



Delivering Omni-Channel Customer Experience

**A Practical Guide to Successful
Omni-Channel Execution**

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Introduction

In the era of digital disruption, acquiring and retaining customers remains one of the main strategic objectives for brands in any industry. Exceptional customer experience can even overshadow the company's product in many instances, creating loyal customers and brand advocates. In order to create a competitive advantage in this regard, brands will need to adopt an omni-channel strategy.

While accomplishing this can initially seem daunting – in reality, omni-channel customer interaction can be achieved with a comprehensive strategy and a well-planned approach. Everest Group's two-part study on omni-channel customer experience details carefully designed steps and provides checklists to help organizations successfully plan and execute their transition to omni-channel.

The first paper in this series – *From Multi-Channel to Omni-Channel Customer Experience: A Checklist for Assessing Readiness to Make the Jump*, discussed the people and technology considerations when pursuing an omni-channel implementation. This second paper delves into the detailed execution of an omni-channel strategy and identifies how to assess post-implementation effectiveness.

This study focuses on answering the following key questions:

- What are the critical organizational success factors for transitioning to omni-channel customer care?
- How should companies approach their transition to omni-channel?
- What are the most efficient and effective methods and metrics to measure the omni-channel implementation?

The checklist at the end offers guidance on managing the people, process, and technology elements critical to a successful omni-channel transition.

Omni-Channel Transition: Critical Success Factors for Organizations

Prior to beginning omni-channel transition efforts, it's important for organizations to ensure they build the following critical success factors that enable omni-channel transformation.

EXHIBIT 1

Critical success factors for omni-channel transition

Source: Everest Group



- Customer-centric approach:** Customer service organizations often organize their operations to accommodate the constraints of certain channels or locations in their delivery model, which do not necessarily align with customers' expectations. Instead, they should identify the customer experience they want to provide – one that engages people anytime and anywhere on the channel they prefer – then invest in the people, processes and technology that gets them there
- Increased role of senior leadership:** Senior leadership can play a significant role in driving forward a corporate-wide omni-channel strategy, especially when it comes to prioritizing investments in necessary technology and people development. Direct involvement of senior leadership to communicate urgency and sponsorship in driving the omni-channel implementation is necessary to mitigate any inefficiencies and roadblocks during implementation
- Organizational readiness for change:** Change readiness in an organization contributes to a more successful transition to omni-channel. It consists of forming an internal transition team, identifying feedback mechanisms, and having a clearly defined plan for integrating existing technology solutions with new platforms and technologies. Along with technology considerations, organizational change readiness also includes understanding the people changes required, like sourcing new skill sets and adapting training methods
- Aligning culture with omni-channel imperatives:** It's important to foster the right mindset and behavior to adapt and seamlessly implement the change initiatives. Through transparent and frequent communication about the vision, objectives, and key milestones of omni-channel transition, organizations can build trust and commitment from employees towards attaining the omni-channel imperatives

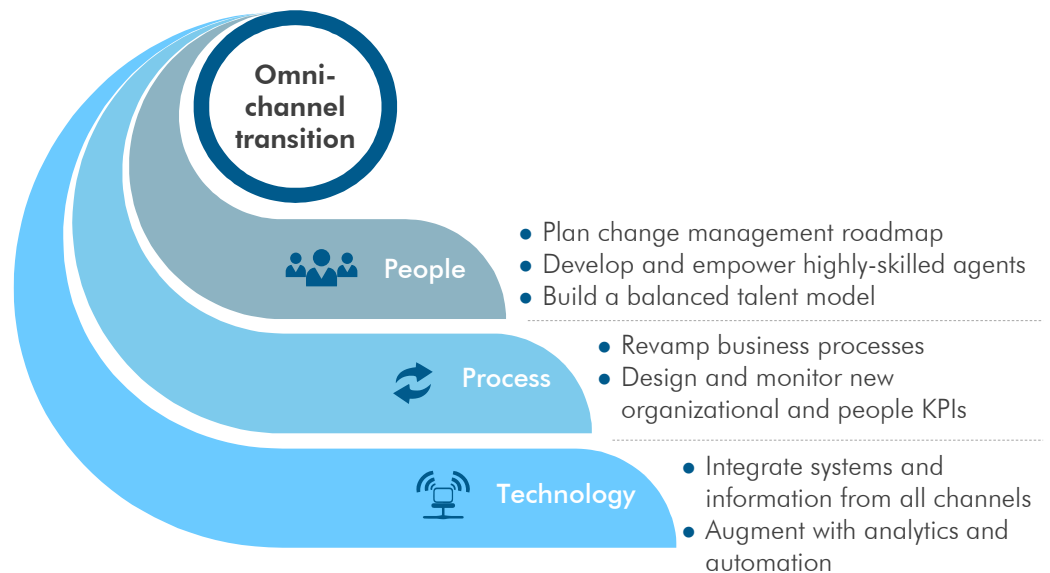
Key Elements of an Omni-Channel Transition

Adopting the right approach for an omni-channel transition is critical and involves a series of necessary planning steps for implementation. The elements of omni-channel transition can be divided across three dimensions – people, process, and technology.

EXHIBIT 2

Elements of an omni-channel transition

Source: Everest Group



1. People:

Benefits:

- Driving bottom-up innovation through empowered agents who represent the firm's brand to customers
- Enhancing customer satisfaction with more impactful interactions between agents and customers
- Improving long-term margins by reducing agent churn and retaining talented employees
- Driving operational and cost efficiencies by achieving an optimal mix of agents (onshore, offshore and nearshore), remote agents (work from home), Robotic Process Automation (RPA), and Artificial Intelligence (AI) bots

Investments:

- Identify new agent profiles, with a focus on brand awareness/advocacy, adaptability, proactive engagement, decision-making, and collaboration
- Recruit fewer yet more highly qualified agents demonstrating complex skill sets around problem-solving and technological expertise
- Train new recruits and the existing agent population to handle processes that cut across channels while maneuvering through different technologies
- Modify the hiring model to recruit new talent with the required skills

- Introduce new performance management incentives to reward innovation
- Offer ongoing competency training and coaching on new technologies, business process excellence, emotional intelligence, and customer experience feedback
- Forecast and re-optimize onshore, offshore, and nearshore resources around location of resources, skill sets, and agent numbers

2. Process:

Benefits:

- Aligning processes with customer expectations enabling greater customer insight
- Targeting outcomes focused on customer impact rather than on operational efficiencies
- Fostering agility to take immediate actions for continuous improvement while fixing root causes of poor customer experiences

Investments:

- Design Key Performance Indicators (KPIs) aligned to the objectives of omni-channel transition and strategic goals of the firm
- Invest in reporting tools to track KPIs
- Map the customer journey to capture the motivations, emotions, and expectations of customers
- Redefine business process workflows to optimally leverage technology functionality across all channels in use

3. Technology

Benefits:

- Enhancing visibility of information into the customer journey collated from multiple sources, with the potential to make proactive recommendations
- Improving agent abilities to better engage customers and suggest next steps to take appropriate actions
- Increasing customer delight by providing a personalized experience based on the analysis of past actions and generation of next best actions
- Significantly reducing Total Cost of Ownership (TCO)

Investments:

- Partner with technology provider(s) that deliver feature-rich, highly resilient, and agile solutions that are as smart and flexible as your best team members
- Invest in analytics and quality management technologies to transform agent interactions into actionable insights for advancing and evolving the customer experience
- Integrate IT platforms and data sources to a centralized solution where all channels can be managed
- Prioritize and fund IT development costs in case of proprietary technology

Measuring Effectiveness of an Omni-Channel Implementation

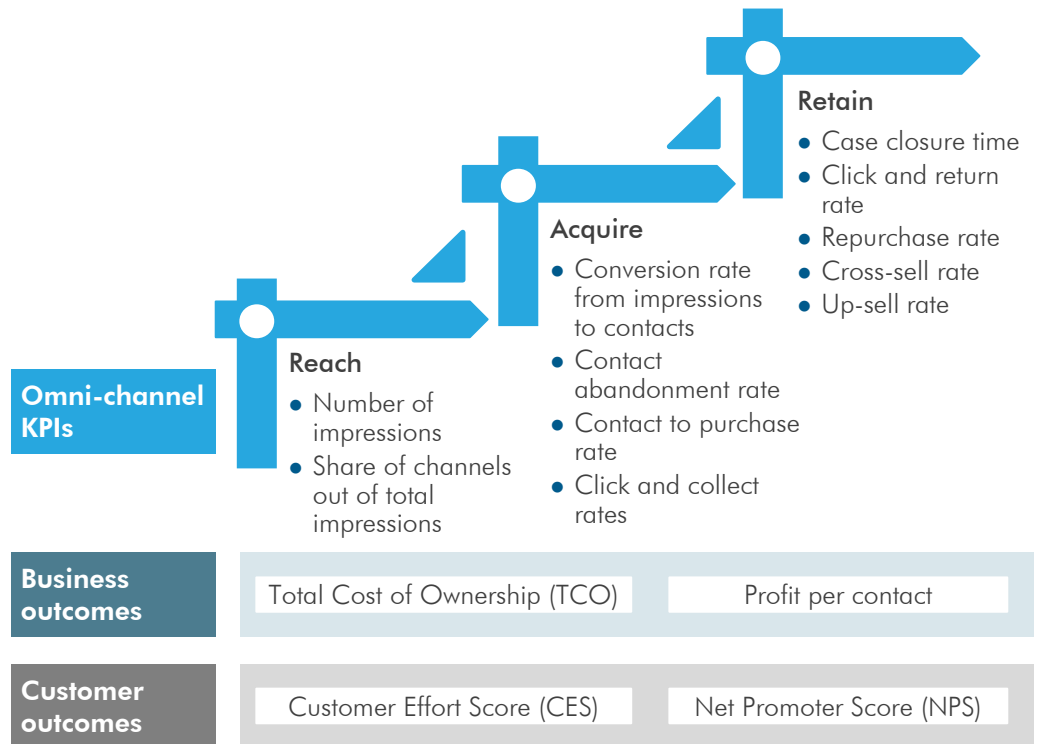
Measuring the success of an omni-channel transition is a challenge for organizations, as multiple touchpoints are managed together, driving both customer and business outcomes. The key is to understand that success cannot be attributed to one particular channel or location, but rather, to evaluating and optimizing a holistic set of touchpoints along the customer journey. It is also important to track channel-specific KPIs in order to effectively locate the root cause of customers' challenges at any point in their journey.

Some helpful metrics that the market has begun to explore to measure the effectiveness of omni-channel implementation are outlined below in Exhibit 3.

EXHIBIT 3

KPIs to measure effectiveness post omni-channel implementation

Source: Everest Group (2017)



Checklist for an omni-channel implementation

The following checklist outlines the key steps for organizations to undertake in the areas of people, process, and technology to ensure a successful omni-channel transition.

People checklist:

<input type="checkbox"/>	Increase employee awareness regarding the need and impact of omni-channel rollout
<input type="checkbox"/>	Identify changing agent and middle-manager skill sets, develop new talent profiles, and align them to evolving KPIs
<input type="checkbox"/>	Modify the shoring and delivery capability mix to align with the new requirements of omni-channel delivery
<input type="checkbox"/>	Adjust labor cost model to account for new mix of skill sets and hiring profiles, as well as separation of non-aligned talent
<input type="checkbox"/>	Revise the compensation structure and incentives to align with revised agent performance expectation and metrics

Process checklist:

<input type="checkbox"/>	Complete customer journey mapping and capture customer feedback at various touchpoints
<input type="checkbox"/>	Identify customers' unmet expectations and map them to the business processes that need improvement
<input type="checkbox"/>	Create business process workflows that can be used across all channels
<input type="checkbox"/>	Identify new KPIs based on firm's objectives of omni-channel transition and design a feedback loop for continuous improvements
<input type="checkbox"/>	Identify and align common omni-channel KPIs and process owners across different channels and business units to ensure consistency and visibility of impact

Technology checklist:

<input type="checkbox"/>	Achieve integration of IT platforms and manage all channels on a common platform
<input type="checkbox"/>	Streamline the information flow from all channels into a centralized platform or database
<input type="checkbox"/>	Ensure consistency and visibility of customer information across all channels
<input type="checkbox"/>	Identify opportunities for implementing automation and analytics solutions and develop a plan to incorporate capabilities such as RPA, chatbots, prescriptive analytics, etc.
<input type="checkbox"/>	Devise a sourcing strategy (in-house or partnerships) to build the identified analytics and automation capabilities

Conclusion

Today's demanding customers are breaking down the barriers between digital and physical channels. In order to serve these customers in today's hyper-competitive world, it is critical for organizations to align their technology, processes, and organizational culture to meet and exceed customers' evolving needs and expectations.

In the near future, a 360-degree view of customers and an omni-channel customer experience will be a matter of survival for brands in competitive industries. Additionally, digital integration and visibility will extend beyond a brand's internal teams to all stakeholders, including suppliers and partners. With an embedded omni-channel strategy, organizations will be better prepared to streamline operations in order to provide a consistent and frictionless customer experience to an ever-wider set of customers.

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