6 Lessons for Omnichannel Marketing

Lesson 1:
"Start small. Start focused."

- ☐ Assess your product and services portfolio, and your business objectives for the year. Identify what solution category can benefit most from an omnichannel approach.

Lesson 2:
"Build internal bridges."

- ☐ Establish an integrated team across all roles and departments that touch the customer's journey OR establish connections with leads across all roles and departments that touch the customer's journey
- ☐ Breakdown the People, Process, Technology required to execute AND measure each part of the customer's journey
- ☐ Set-up a schedule for knowledge sharing and team discussion to assess how the journey is performing
- ☐ Define a vision and overarching objectives for team alignment and buy-in

Lesson 3:
"Form two tracks."

- ☐ Ensure two tracks are defined – one for the implementation of your omnichannel plan and another dedicated to innovation and experimentation
- ☐ Set parameters for the innovation and experimentation track to keep efforts focused
- ☐ Test and iterate – once something is proven, integrate your omnichannel track and scale it

Lesson 4:
"Think people first."

- ☐ Assess customer documentation (research, journey maps, etc.) and validate with team members
- ☐ Based on your understanding of the customer, develop an omnichannel strategy that is informed by their experience, preferences and behaviour

Lesson 5:
"Remove the friction."

- ☐ Assess the planned or current omnichannel strategy to understand where there are potential areas of friction. Friction is defined as anything that prevents the customer from having one seamless and personalized experience.
- ☐ Prioritize the areas of friction identified and work with the dedicated team to identify solutions to create a more seamless experience
- ☐ Reflect on your plan to ensure you're not forcing a customer to the one channel you want them to use – provide them choice and guide them naturally through the journey

Lesson 6:
"Make observation routine."

- ☐ Have a plan in place to frequently and routinely share observations about the customer's interactions throughout the journey
- ☐ Identify opportunities to gain deeper insight into the customer's experience, such as feedback forms, community forums, etc.