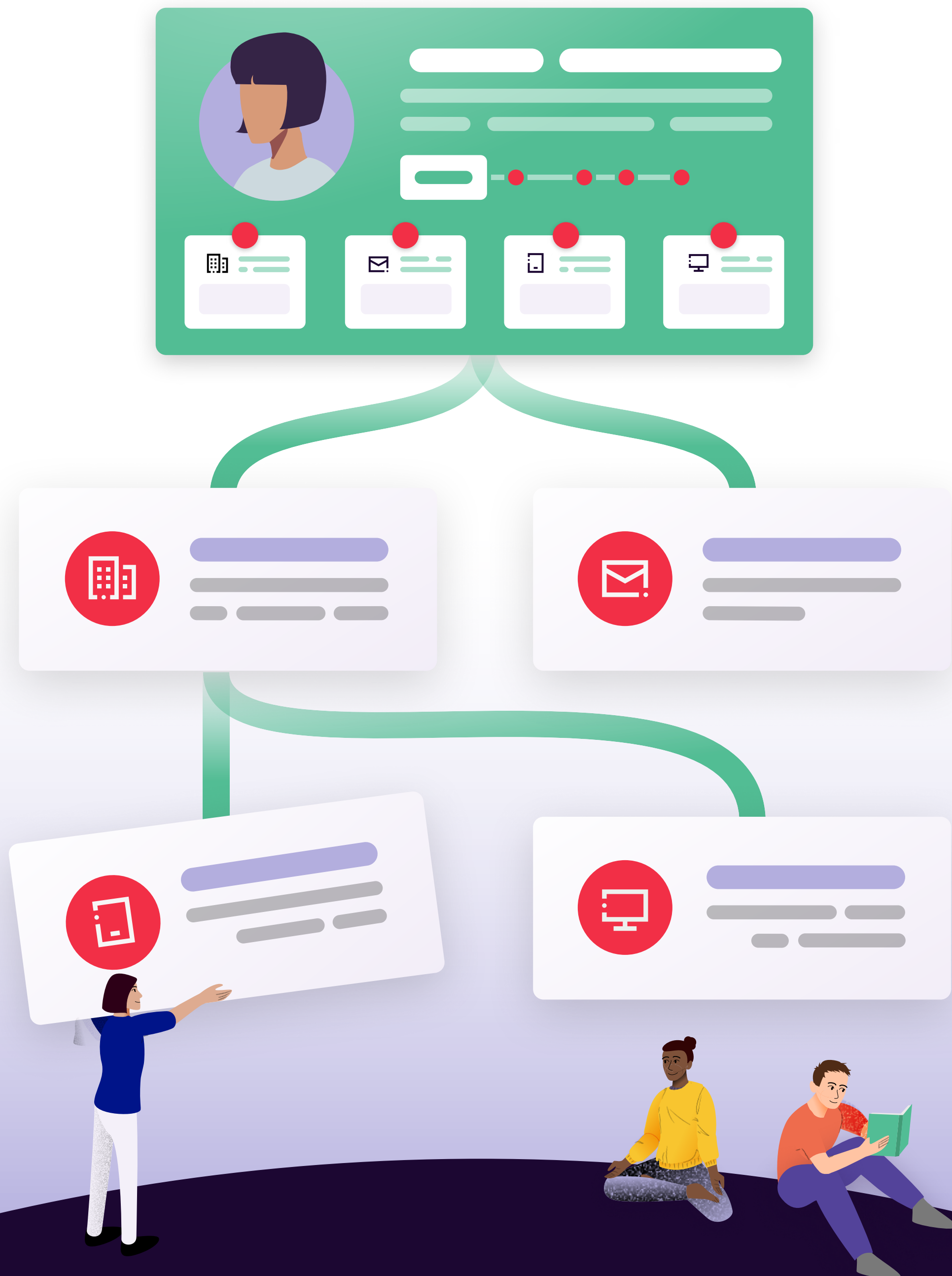


The Ultimate Guide to Omnichannel

How to create seamless customer experiences across channels



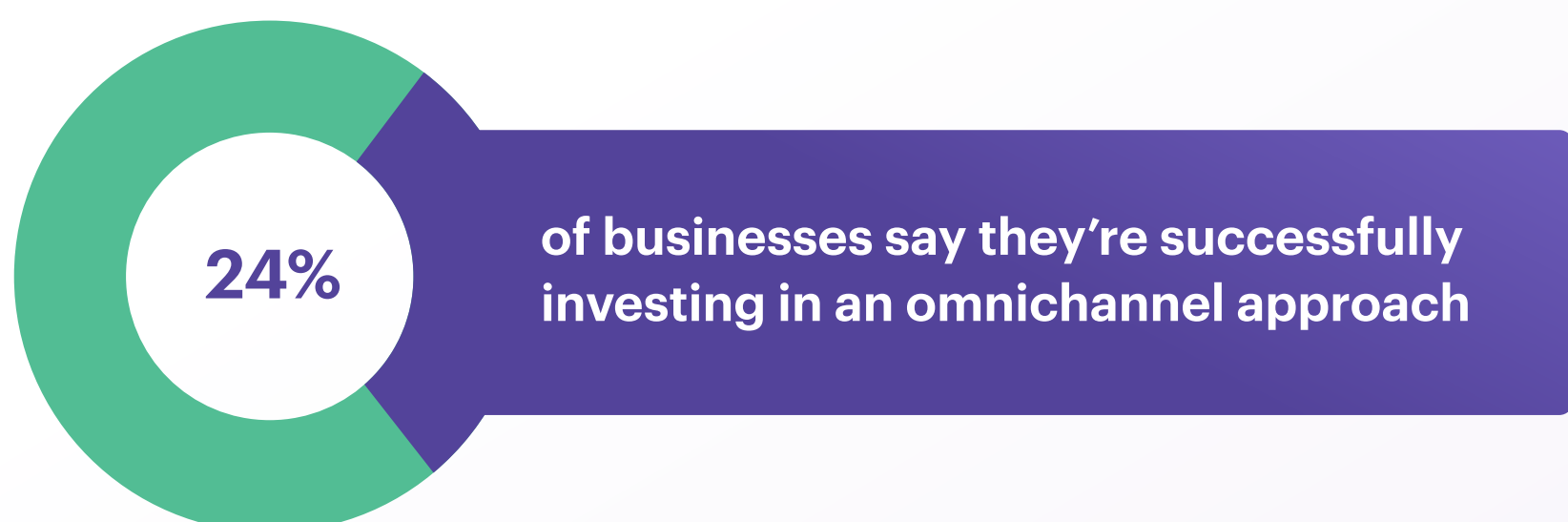
The Ultimate Guide to Omnichannel

Today's customers expect a consistent, seamless, and personalized experience no matter how they choose to do business with your brand – whether that's in-store, online, over the phone, via SMS, live chat, or [email](#).

Yet, as businesses rush to meet customers on their preferred channels, two key problems have emerged: departmental silos and legacy software.

Traditionally, teams have been structured to focus on specific channels (marketing oversees email campaigns, social media is split between paid and organic, customer support handles incoming calls, etc.) But without a centralized data hub, teams often develop tunnel vision, working with only a snapshot of the customer journey. The result is a clunky, disjointed customer experience.

On the other hand, an omnichannel approach integrates every channel together to show a holistic view of the customer journey.



Source: [The State of Personalization 2021](#)

In this guide, we'll outline what omnichannel engagement is, how to successfully implement it, and how other companies have leveraged omnichannel engagement to delight their customers.

What is omnichannel?

“Omnichannel” is often used interchangeably with the term “multichannel,” which is misleading. In fact, many companies say they offer omnichannel communications, when in actuality they're using a multichannel approach.

The key distinction between these two strategies is whether or not customers are able to switch seamlessly between channels (which is the hallmark of omnichannel engagement).



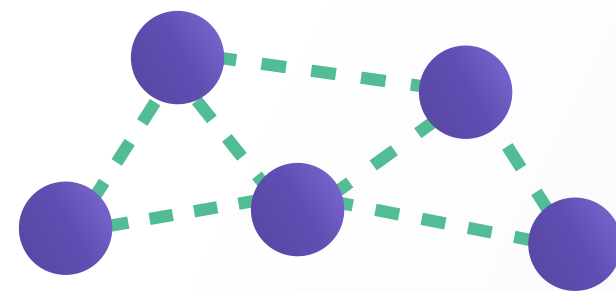
A great example of this is with customer support. Say an individual reaches out to your business first via chat, before rolling into a video co-browse session or voice call with your agent. With an omnichannel strategy, that representative should be able to see the previous chat conversation to understand the issue at hand, rather than coming in cold and asking the customer to repeat themselves. (Or better yet: a business should [intelligently](#) route a customer to the right representative based on their skill and proficiencies.)

With a multichannel approach, a representative wouldn't have access to information about that customer's history on different channels, limiting the level of service they can provide.

For quick reference, here are our definitions of omnichannel vs. multichannel:



An **omnichannel approach** is when every channel a business operates on is connected to provide continuity and a personalized customer experience.



A **multichannel approach** is when a business operates on multiple channels, but doesn't have the consolidated data to understand customers' complete, cross-channel journeys.

Why are omnichannel customer journeys important?

Omnichannel has become the gold standard across industries - especially in the past year. The Covid-19 pandemic had businesses scrambling to meet consumers in the safest and most accessible medium (online) with the [average number of digital touchpoints increasing by 63%](#). And this will be a long-lasting trend.

According to Twilio's latest State of Customer Engagement Report, businesses plan to add [four new customer channels](#) in the coming year (with one-third of respondents listing live chat, chatbots, IVR, and video as the new additions).

But meeting customers on their preferred channels is only half the battle. Businesses need to engage and convert them once they get there. And today's consumers are increasingly disinterested in unpersonalized experiences.

In fact, [45% of consumers](#) admitted that an unpersonalized experience would deter them from becoming a repeat customer with a brand. Whereas [60% of consumers](#) said personalization would convince them to return (only [44%](#) said the same back in 2017).

With an omnichannel view of customer behavior, businesses can go beyond surface-level personalization tactics (like using a customer's [first name in an email](#)) to meaningfully engage customers.

Take Walgreens, which has been focusing heavily on creating seamless, cross-channel experiences. They've been revamping their [prescription](#) refill process to make it as simple as possible, no matter the channel. Using the Walgreens app, a customer can scan the barcode on their medicine bottle and automatically generate the refill for pickup at their local store. A customer could also order a refill by replying to a Walgreens reminder email, or simply calling up the pharmacy.

It's an approach that benefits businesses as much as consumers: Walgreens found that omnichannel customers [spend 3.5-6x more](#) than those that shop in-store only.

Listen to leaders from Walgreens Boots Alliance, Accenture, and Twilio Segment discuss how to orchestrate intelligent customer engagement [here](#).

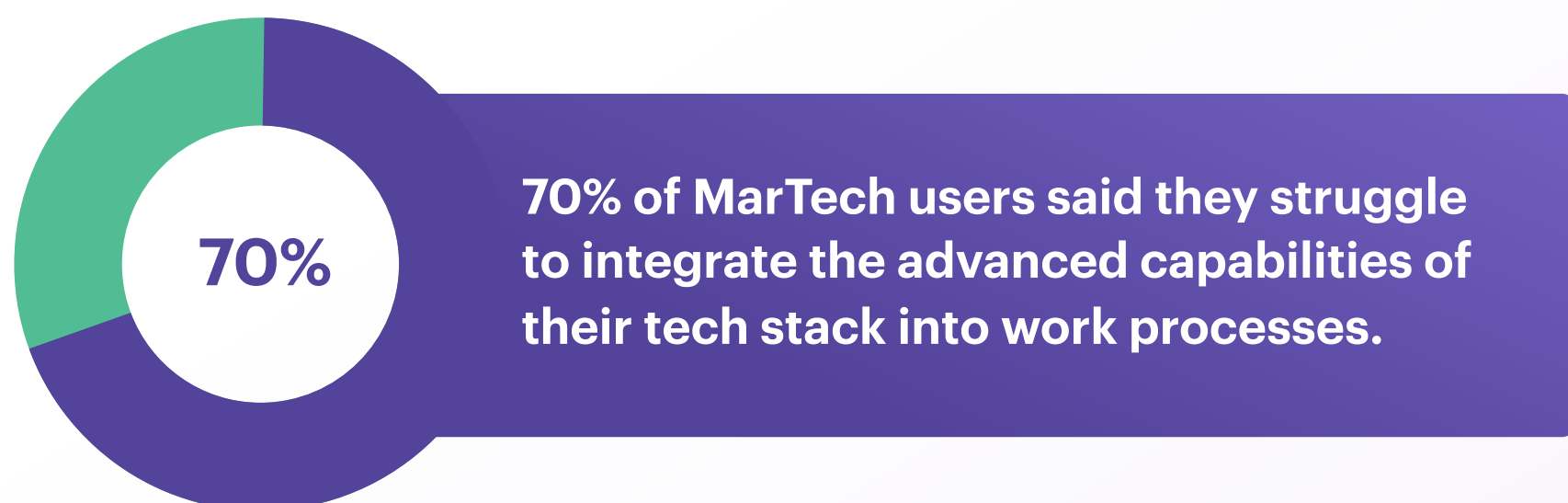


How to pull off omnichannel engagement.

First and foremost, to pull off omnichannel customer engagement, businesses need to have the right infrastructure. Teams across the organization should have access to a centralized data hub that offers a single source of truth on customers' behavior and history across channels.

It might seem obvious to say, but: an integrated customer experience begins with an integrated tech stack.

There are a few key components to consider here. The first being: **accessibility**. The goal is for this consolidated customer data to be actionable. Having an intuitive user interface that allows teams to view, share, and act on insights is essential. This includes the ability to create cohorts of users based on event behavior or specific traits (like pages viewed, purchase frequency, and so on).



Source: [The 2020 Gartner Marketing Technology Survey](#)

The second point to keep in mind is: **scalability**. Customer channels are constantly emerging and evolving, and businesses are continuing to add more tools and apps into their workflows to manage these interactions. Being able to seamlessly integrate new data streams is crucial to keep momentum, and maintain a 360-degree view of the customer.



Source: [The Customer Data Platform Report 2021](#)

Another cornerstone of scalability? Automation. Using real-time data to trigger relevant messaging ensures that businesses never miss a window of opportunity to engage customers.

Here's a quick recap of what's needed for implementing omnichannel engagement:

1. A centralized data hub that consolidates customer data from any source in real-time, and easily integrates with new applications and platforms.
2. The ability to [merge the complete history](#) of each customer into a single profile (updated in real-time), no matter where they interact with your business.
3. The ability to [orchestrate various actions](#) across a set of customer engagement tools (like Twilio and [Twilio SendGrid](#)) to deliver personalized communications [based on customer interactions](#) and preferences.

Not sure where to start with omnichannel?

Building an omnichannel communications strategy may seem intimidating, but it shouldn't. Many Twilio customers start with email and add new APIs as their company grows, allowing them to incrementally develop an omnichannel strategy, without sacrificing customer experience along the way.

[Learn how Twilio SendGrid](#) can scale with your business.



How top brands are building omnichannel experiences.

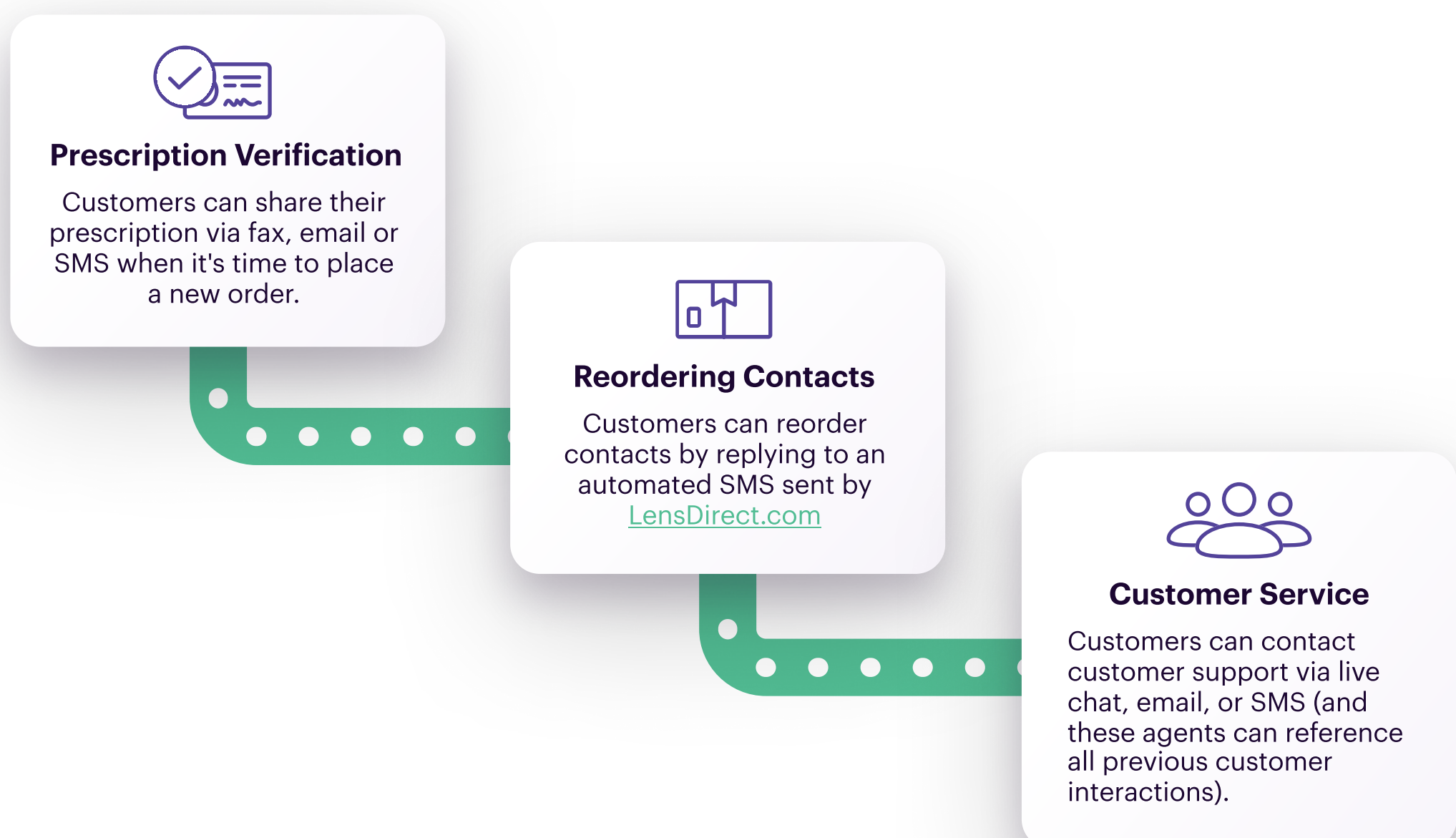
Now that you're up to speed on all things omnichannel, you might be curious about what it looks like in practice.

To help, we've highlighted how four brands built omnichannel communication strategies to cater to their customers' unique needs.

How LensDirect.com envisions a customer-centric omnichannel experience

Founded in 1992, [LensDirect.com](https://lensdirect.com) has helped customers get low prices on contacts for the last 27 years. Having matured during the rise of the internet, LensDirect.com knows how to leverage the latest technology to deliver superior customer service.

Here's a closer look at how the company uses a diverse set of communication channels:






By offering customers the flexibility to do business on their preferred channels, LensDirect.com makes it faster and easier for their users to buy contacts. That ease-of-use paired with an integrated experience across each channel is what keeps LensDirect.com customers coming back time and again.

Cover insurance invests in an omnichannel sales process

[Cover](#) is a U.S.-based insurance brokerage that uses technology to match individuals with the best home, auto, and renters' insurance policies for their needs. From day one, this tech-company-on-top-of-an-insurance-brokerage has offered an omnichannel customer experience throughout its sales process.

Here's how Cover helps customers find the perfect insurance package using their preferred method of communication:





 Phone	 Mobile App	 SMS/MMS
Customers can call Cover's team of qualified sales advisors directly to review their needs and get quick price quotes.	Phone-shy users can use Cover's mobile app to share their coverage needs, receive quotes, and enroll directly in coverage.	Customers can text and share images with Cover's "insurance concierge" to discover the best coverage for them and enroll instantly.

Using Twilio, Cover's customer service team can instantly see every interaction an individual has had with the brand across any channel, allowing them to pick up exactly where a customer left off and more efficiently serve them.

Delivering on the omnichannel promise with Deliveroo

[Deliveroo](#) is a London-based food delivery website and app. By partnering with Twilio, the Deliveroo team has created a true omnichannel experience for their customers, allowing them to choose exactly where they want to receive updates on their latest order.

Here are the ways they help turn “hangry” users into happy customers:

 In-App Messaging	 SMS	 Voice	 WhatsApp & Facebook Messenger
<p>For orders placed via mobile app, Deliveroo can send mobile push notifications to easily update users when their order has been confirmed, picked up, and delivered.</p>	<p>Deliveroo also texts its users to share order notifications, marketing messages, and customer service updates.</p>	<p>Trouble with drop-off? Customers can call their driver via a masked number, allowing them to communicate in real-time without compromising their privacy.</p>	<p>Users who place orders through the company’s website can opt-in to receive order notifications via WhatsApp or Facebook Messenger.</p>

Aimee Ruddy

Product Manager, Deliveroo

“We want customers to be in channels that work for them and not to force them down certain channels. Some prefer Facebook Messenger, others ring us and some customers contact us on social channels. One of the advantages of Twilio is it makes it easier to scale and bring these channels into existing workflows.”

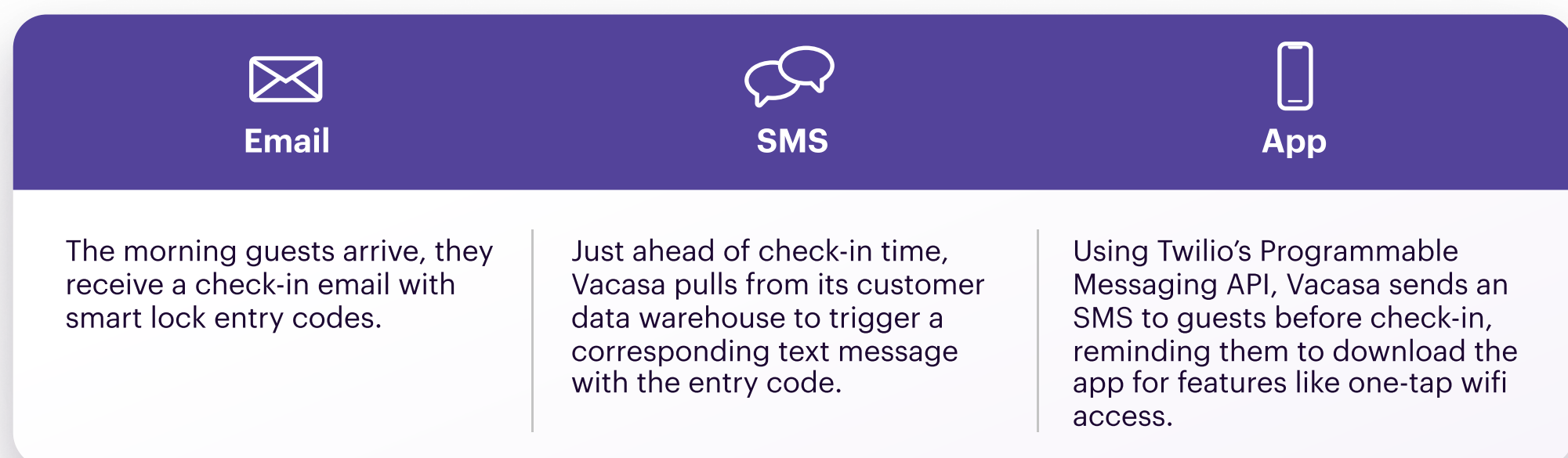
Using Twilio, Deliveroo is able to create a flexible, convenient, and consistent experience across all customer touchpoints, ensuring its app is top of mind the next time users need to order food.

How Vacasa strengthened omnichannel engagement

Vacasa is North America's leading vacation rental management platform, caring for more than 30,000 vacation homes throughout North America, Belize and Costa Rica. [Vacasa](#) started working with Twilio and Segment to visualize the entire customer journey and more effectively deliver personalized messages to guests across channels – removing friction from their vacation experience.

With Segment, Vacasa could consolidate customer data across channels to gain a holistic, real-time view of both guests and homeowners. From there, the team could tailor its messaging across its website, app, email, and SMS alerts based on user behavior.

Here's how Vacasa created an intelligent multichannel welcome sequence to remove friction from the guest check-in process:



Using these omnichannel tactics, Vacasa guests are seamlessly welcomed into their vacation stays (on the channel they prefer) with key check-in information right at their fingertips.

Getting started with omnichannel engagement

Getting started with omnichannel engagement (or even scaling a strategy) requires the right combination of data, infrastructure, and communication APIs to reach customers across an array of channels.

Using [Twilio](#), [SendGrid](#), and [Segment](#), you can deploy [email](#), [SMS](#), [video](#), [chat](#), [voice](#), and more from a single platform, to build personalized, consistent customer experiences based on [customer data](#).

[Schedule a demo](#) today to learn how your business can implement an omnichannel strategy with Twilio Segment.

Want to learn more?



15 Ways to Use Data to Engage Your Customers

15 ways to use Segment and Twilio to make your customer engagement more intelligent across every channel.

[Download guide >](#)



The 2021 Guide to Using Email and SMS

Everything you need to know about email, SMS, and using the two in tandem to reach and engage your customers.

[Download guide >](#)



Journeys 101: Getting Started with Omnichannel Journeys

Learn how journeys unlocks personalized engagement across channels using real-time customer data.

[Download guide >](#)