

Making omnichannel a reality: a practical guide



Omnichannel has been 25 years in the making

In the 1990s, all types of companies started opening call centres as toll-free numbers became a popular marketing tool and sales channel. In the late 1990s and 2000s, everyone had to figure out email, get a website and, after the iPhone launched in 2007, bolt a mobile strategy on to everything. In the 2010s, social media was the new darling, and then first apps and next mobile messaging services like WhatsApp and Messenger took over our smartphones.

Today your customers can come to you from absolutely anywhere, at any time, over a dizzying multitude of channels. Your job is not to second guess them, or even corral them towards the channels you want them to use. Your job is to facilitate communication between your customers and your company, however and wherever that happens.

Today that means omnichannel.

Omnichannel means providing a consistent level of service to customers (and prospects) across all channels. It means making the same information and functions accessible across all channels. It means allowing customers to hop between channels without having to start the transaction all over again or to repeat information.

For reasons to do with legacy technologies, outdated processes, and internal silos, very few companies – at least ones of any size – are currently equipped to do that.

In this white paper, we look at the challenges and offer some practical solutions that can enable companies of any size to start making omnichannel a reality within weeks rather than years.

1. Introduction

When you dig into it, most of the challenges of omnichannel, come down to problems of integration.

To gain a single view of the customer – a prerequisite for creating omnichannel journeys – multiple back-office and CRM systems might need to talk to one another. Some of these might be on-premise and/or legacy, and some might be new cloud solutions.

To route communications wherever the customer or business process demands, all channels must be tied together, including voice, chat, email, SMS, social, messaging, video, and others.

Your agents, your customers, and your processes all need to be able switch channels seamlessly, with relevant customer and transaction data following. That means integrating all those different channels not only with one another, but also with your communications infrastructure and back-office systems.

On the business process side, your customer journeys need to map to your customers' constantly changing channel preferences, while doing their best to optimise efficiency for everyone involved – company, customer, and agent.

And finally, your agents and other representatives need at their fingertips all the communications channels, data, and tools necessary to manage customer interactions quickly and effectively.

It's a big task, but one you can accomplish surprisingly quickly if you go about it in the right way.

1.1 What is omnichannel?

Most contact centres these days are multichannel. That means they interact with customers over several different media channels, as nearly all businesses have to these days.

But that doesn't mean they do it in a joined-up way. Most of those channels exist in silos.

The agent dealing with a webchat, for example, has no idea what the customer's last voice interaction was about. They are also unable to hand the customer on to another channel that may be more appropriate for their needs. And they can only access limited data from some company systems rather than view the whole picture in real-time.

In an omnichannel environment, even if agents specialise in particular channels – voice team, chat team, social team, etc. – they are connected to one another, and information flows freely yet securely between them and between the company's various systems.

To the customer, the transition between channels is seamless and natural. Crucially the choice to transition from one channel to another is always under the customer's control – or at least it feels like it is.

1.2 How to overcome the barriers to omnichannel

In this short white paper, we will look at how to get quick wins that move your company from a multichannel environment to a connected, free-flowing, omnichannel one without ripping out and replacing any of your existing technology.

Adding channels isn't the issue. It takes just a few minutes to create a company account with Messenger, Twitter, Instagram, Skype, and so on. But integrating those new channels with your existing IT systems, communications infrastructure, and business processes is where the real business challenge lies.

In the next few pages we will see how to:

- Keep up with the dizzying pace of technological change by making it easy to add and manage new channels.
- Break down your internal silos so that data can be accessed where and when it's needed, and business processes can cross your self-imposed boundaries.
- Quickly create optimised customer journeys that improve service and reduce costs by emphasising customer needs in the design process.
- Do all this in months not years, and without ripping and replacing a single piece of existing hardware or software.

2.0 The dizzying pace of change

We all know that change is the only constant when it comes to business technology. Yet paradoxically, enterprise IT evolves relatively slowly compared to the lightning fast and constant development in consumer devices, services and software.

Facebook, Twitter and WhatsApp might today be changing how companies communicate with their customers, but these services were not created with corporations in mind.

What it does mean is that the CRM software and telephony system you bought five years ago cannot – without lots of systems integration work – allow your agents to tweet replies to customers, or instant message them a link to an offer, or send them a short video of how to install the latest product they bought from you. Neither can you write business processes that intelligently ‘choose’ to do any of those things without intervention from a human agent without a huge amount of development and testing.

2.1 Customers have the whip hand

Recent and ongoing developments in consumer technology have given customers genuine power. They really can now dictate the terms on which they wish to engage with the companies from whom they buy.

At the same time as they are taking advantage of the explosion of new channels, consumers’ expectations have also skyrocketed as they have been exposed to a wider choice of providers for just about every conceivable product and service.

In this ultra-connected, digital and mobile age they know what they want, and above all they want it quickly and efficiently.

Price and quality are still huge differentiators, of course, but the success of Uber and Amazon show that any company that can deliver with speed hugely increases its chances of winning business.

3.0 Omnichannel challenges

So we know what customers want – choice and speed. Now we just need to deliver.

To win over customers in an always-on, omnichannel world means everything has to be joined up: business processes, front and back offices, departments, and particularly customer journeys. The major business challenges companies are grappling with include:

- The ever-changing customer service technology ecosystem.
- A necessary cultural shift towards the sharing of customer touchpoints, business processes, data management and technology.
- How to join up customer experiences across old and new channels whilst driving customer service automation.
- Pressure on IT to deliver more with the same or less resource, and to drive innovation.

IT systems even a few years old lack the scalability and agility now be demanded, and worst of all, they don't play that well with other systems and applications.

A problem then arises when you want to add new functions, new channels, and new ways of doing things – and achieve all these things in a coordinated way. You end up with a bowl of spaghetti that looks like this:

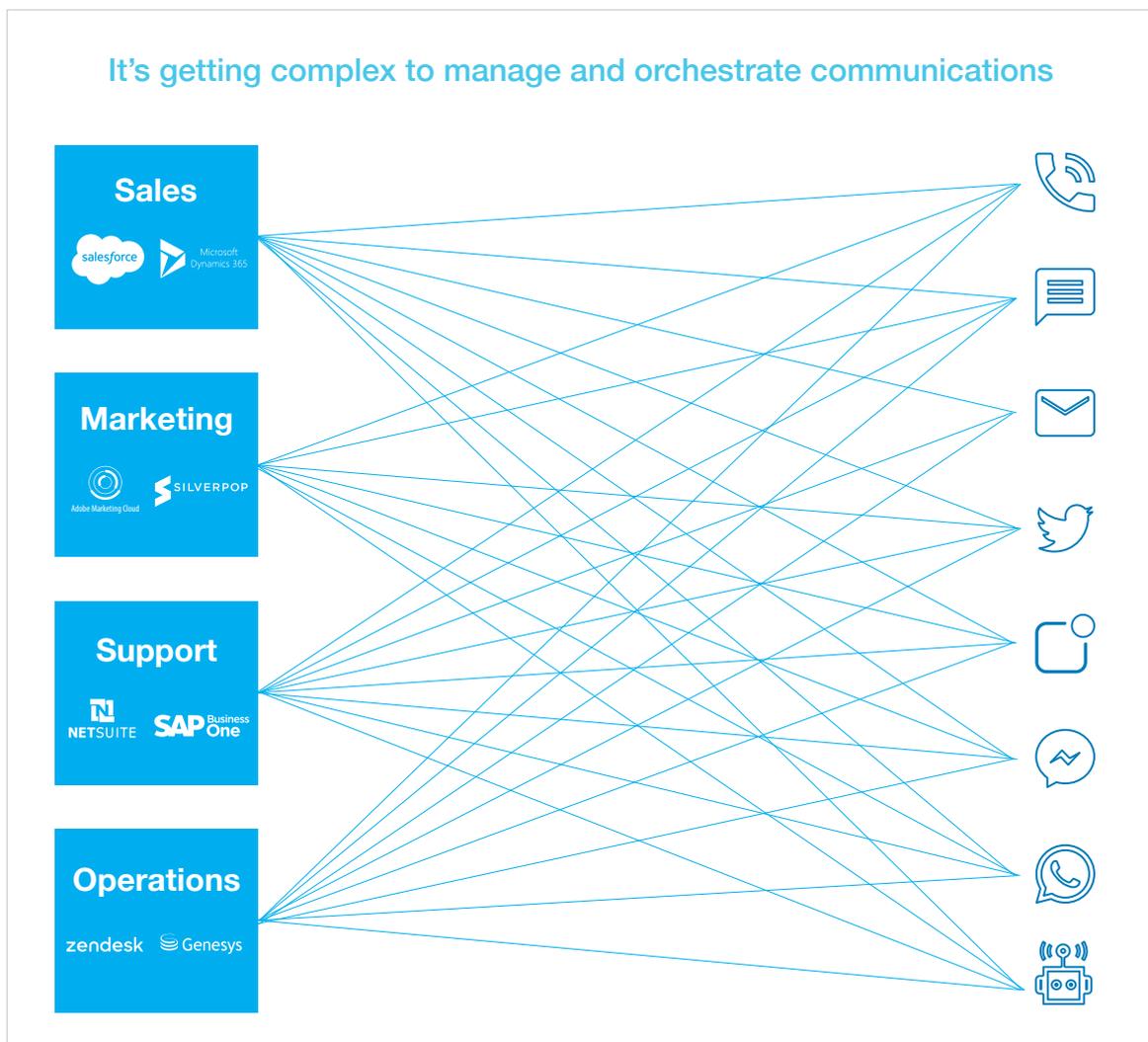


Figure 1: Complexity of managing communication between channels and business systems

3.1 The technical challenges

Getting more specific, in order to deliver modern omnichannel customer experiences, three elements are essential:

1. Sophisticated integration to get all your systems working with each other across multiple channels, departments, and data silos.
2. A single point of orchestration for communications and customer journeys, and a single view of the customer
3. The ability to manage and add multiple channels, vendors, and APIs as they become available or get updated

In other words, we want to be able to create customer journeys that go where the customer, the transaction, the relationship, or the business process need to go – not where the limitations of the technology allow them to go.

The challenges here are not just focused on integration. If you've just spent months of development time integrating Messenger into your legacy and cloud apps, what do you do when Facebook changes the API, or when your customers suddenly all switch to WhatsApp? Channel maintenance and management, as well as future-proofing, are also concerns.

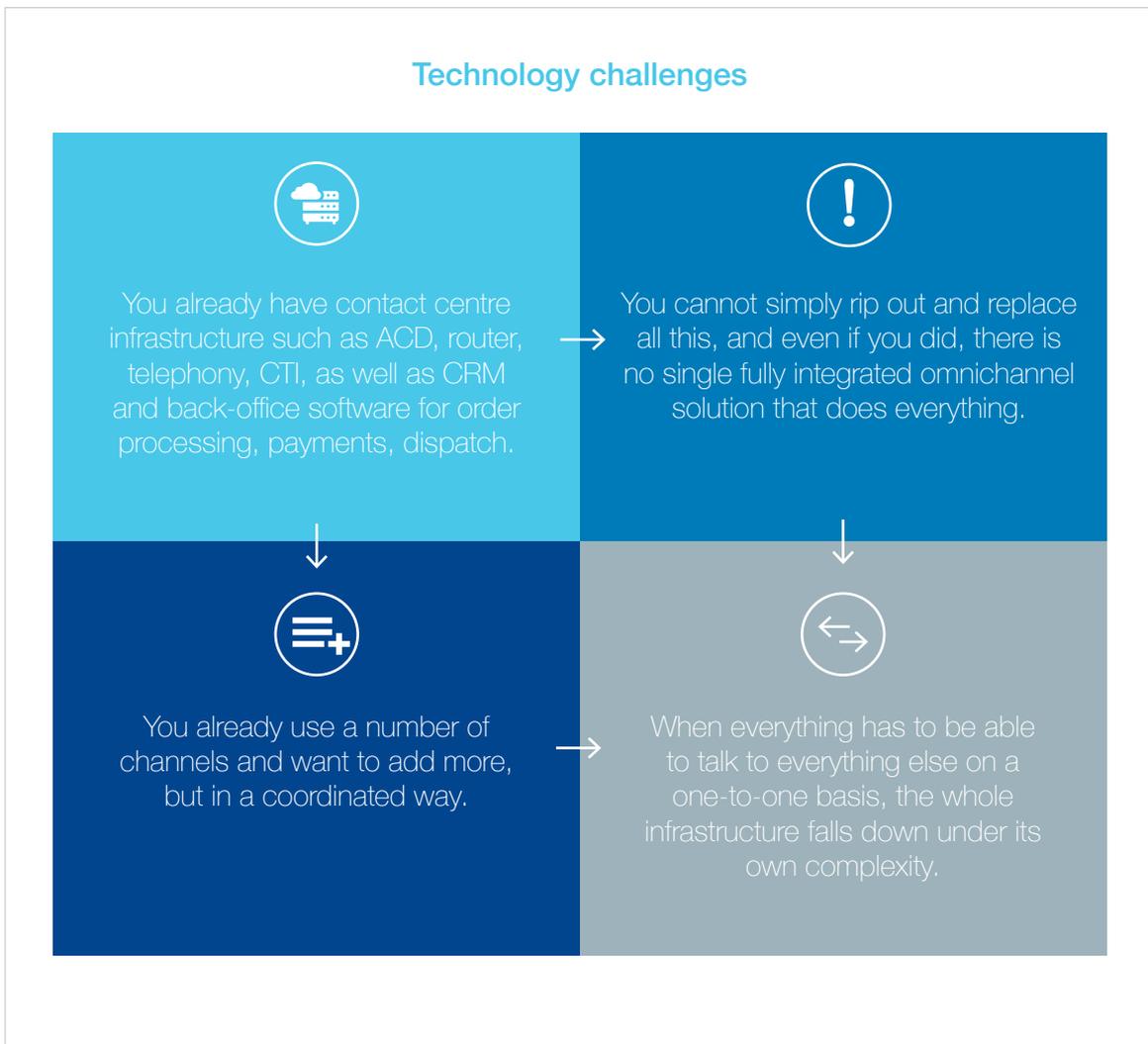


Figure 2: Complexity of delivering omnichannel across your existing systems

4.0 An orchestration layer

As most good answers tend to be, the solution is relatively simple. Instead of integrating everything with everything else, which leads only to exponential complexity, you need to introduce a new layer to which each system integrates only once. Through this new layer, each system, database, channel, or business process can interact with all or any of the others.

We call this new layer an “orchestration platform”, because its job is to coordinate all the links between all the elements that make up a modern omnichannel customer service function:

How we structure the orchestration process

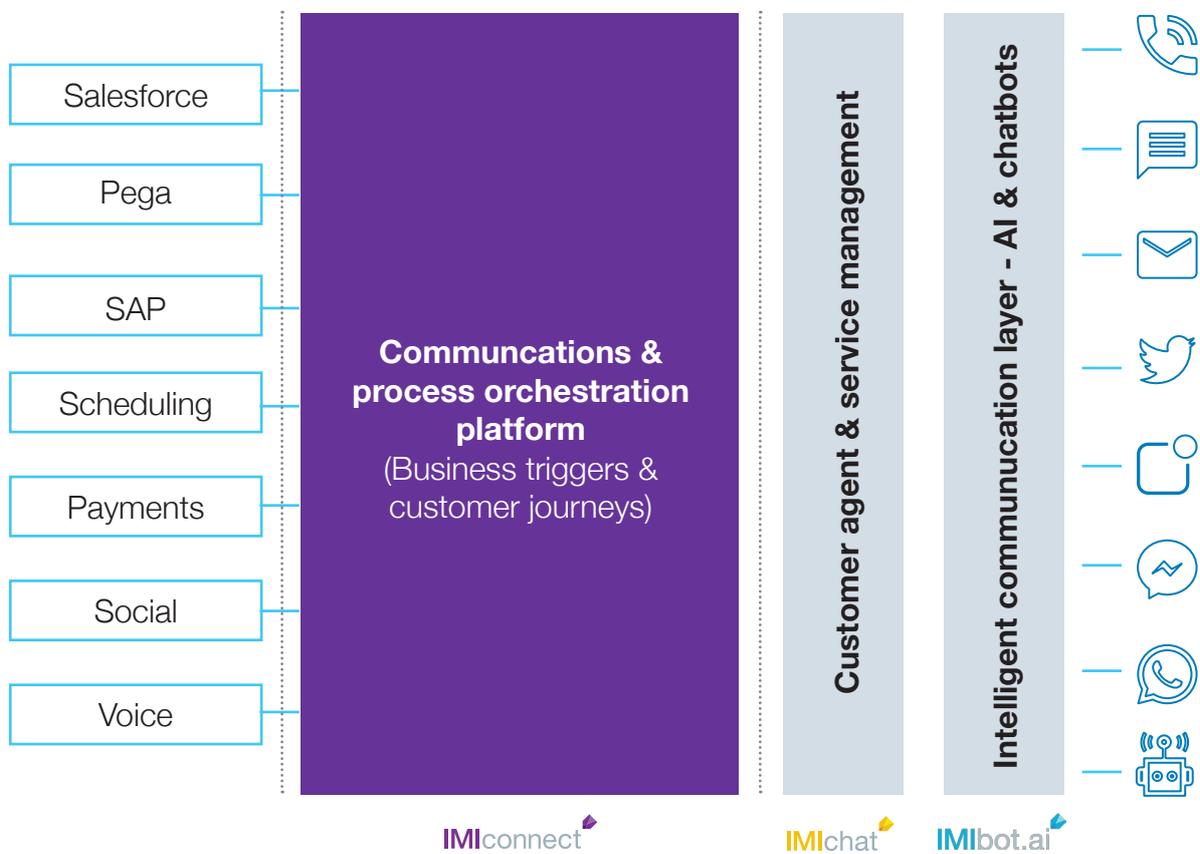


Figure 3: Simplifying communication via an orchestration platform

An omnichannel orchestration platform is integrated with your existing onsite or cloud systems at one end, and with any number of pre-integrated communication channels at the other. As everything goes through the platform, you can set triggers and build workflows that dictate how your IT and data systems interact with channels.

Any business or customer event in a system can be a trigger. For example, a lifecycle point, a piece of critical comms, a Facebook post by an unhappy customer, a cart abandoned. With a drag-and-drop interface, you simply add trigger events from different systems and tell the orchestration what to do - for example, if an email is received from a customer in Salesforce, send this particular SMS back to the customer.

4.1 Creating effective customer journeys

By chaining events, processes and business systems together you can create tailored, personalised customer journeys built on business logic, without needing to replace any of your existing systems. You can even create branching paths combining multiple customer journeys with automated hand-off between live and automated channels.

For example, while you might want live agents to intervene to solve more complex problems, low-value, repetitive interactions – such as filling in a form – could be pushed to automated channels. The result is that each type of interaction at each stage of a process is handled in the most appropriate and cost-effective manner.



Figure 4: Designing customer journeys with IMIconnect's drag & drop workflow builder

4.2 Adding and managing channels

There are currently no contact centre infrastructure or software platforms that offer all the communication channels pre-integrated – and, of course, there are new channels emerging and being adopted by customers every year.

Most channels can be accessed with APIs, but integrating every one of your systems with each of the channels you'd like to use is time-consuming to set up and, more importantly, to keep up-to-date. This is where the orchestration platform can take the strain.

Let's say you use Salesforce for lead management and for CRM, and Genesys as your contact centre platform. Rather than have each of these integrate separately with, say, Facebook Messenger, each system integrates with the orchestration layer, which in turn connects them with the communication channels.

When a channel API changes, or a new channel (e.g. Alexa) or function (e.g. chatbots) gets added, the only thing that needs to adapt is the orchestration layer.

Using triggers to initiate customer journeys

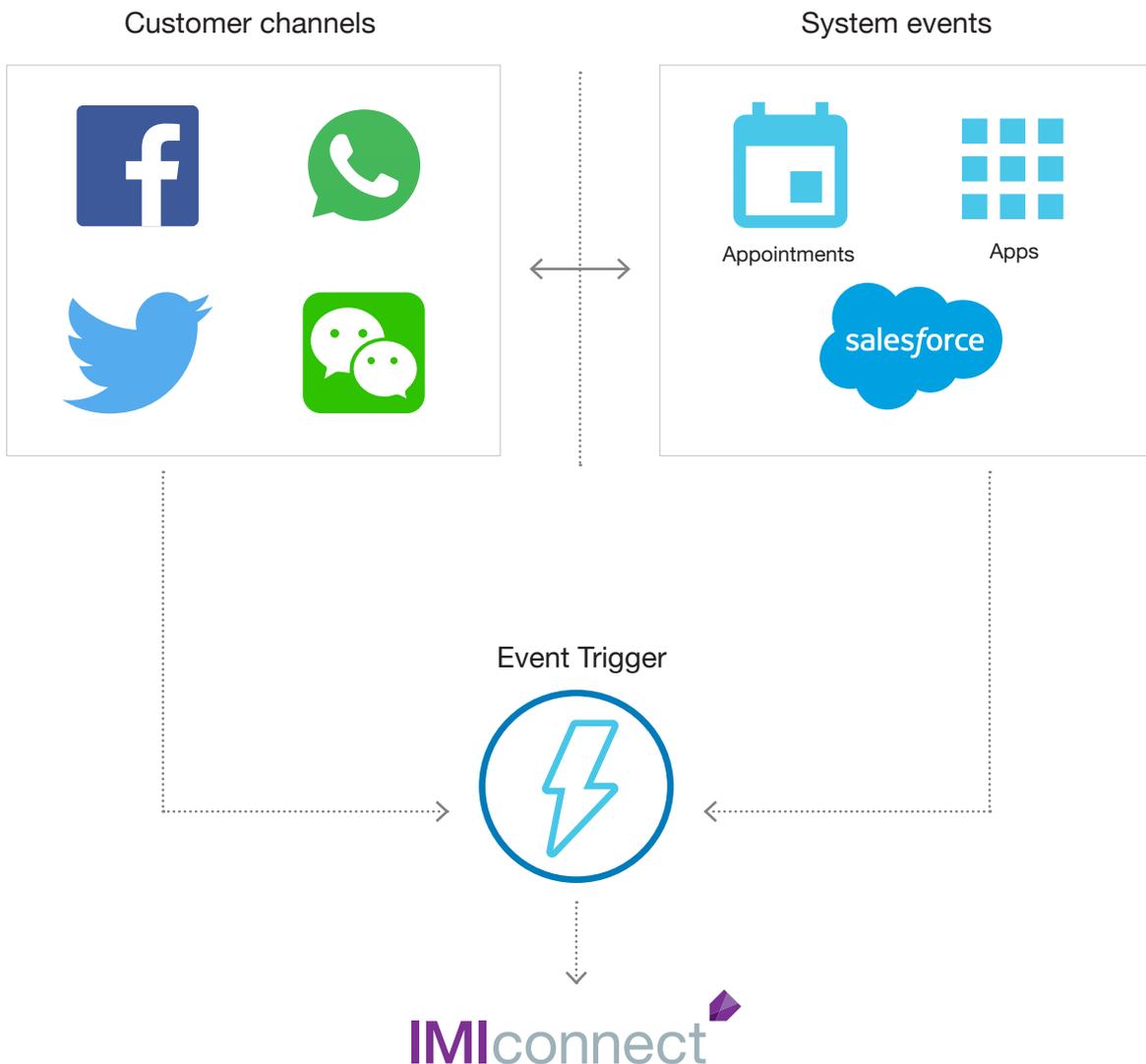


Figure 5: Managing communication channels and system events as triggers to design customer journeys

4.3 Switching between live agent assistance & automated self-service

Sometimes during the chain of interactions known as a customer journey you will want to switch channels or flip between agent-assisted and automated channels. For example, if a customer cancels an appointment via email, you might have this followed up by an agent over voice or chat to find out why.

By creating customer journeys using the orchestration platform, these branching pathways can be configured, ensuring each type of interaction at each stage of a process is handled in the most appropriate manner for your business's success:



Figure 6: IMIconnect allows for easy optimisation of business processes & customer comms

5.0 Business benefits

Within a few years, omnichannel will be a baseline requirement for doing business, much like having a website or phone number is today. If customers cannot interact or transact with you using their preferred method, the chances are good they will just go to someone else.

So the biggest and most obvious business benefit of implementing omnichannel is simply that you get to keep being in business. But there's a lot more to it than that.

In making the necessary technical, process, and organisational changes your company will also begin to undergo a profound transformation. By breaking down internal silos, you will uncover insights that you could never have seen before and encourage teams to look beyond their own turf and think globally about the business.

These benefits are delivered by a new layer of tools that enable the sharing of information across the enterprise, and which allow processes to cross previously unbreachable barriers between departments (for example marketing and customer service), data sets, and functions.

On a tangible and measurable level, the trend is for costs-to-serve to decline even while service levels and other performance indicators (such as customer satisfaction) rise. The simple fact of allowing customers to use the lower-cost, self-service channels which many of them demonstrably prefer sees to that.

This will certainly break old business models, but at the same time enable new, more efficient ones to take their place. While the first mover doesn't necessarily take all the prizes, getting in the game now rather a few years down the line will definitely pay dividends.

Our customers have reported the following impressive improvements across their customer service operations:



QUICK EXTENSION OF CUSTOMER SERVICE
CAPABILITIES TO **DIGITAL CHANNELS** AND
METHODS OF ENGAGEMENT

CENTRALISED ORCHESTRATION
OF ALL CUSTOMER JOURNEYS
ACROSS MULTIPLE CHANNELS

ABILITY TO **RAPIDLY**
PROTOTYPE AND SCALE NEW
CUSTOMER JOURNEYS

UP TO **10X** FASTER
CUSTOMER JOURNEY
DIGITISATION

40%+ IMPROVEMENT
IN NPS / CUSTOMER
SATISFACTION SCORES

5.1 Customer stories

The UK's largest provider of cloud contact centre solutions has, as you might expect, a great product portfolio. The problem is that most of these products were built for a desktop-only world.

While their clients all need to start meeting the omnichannel demands of their customers, none of them can simply afford to bail on the large capital investments they made in contact centre infrastructure, telephone systems or CRM and back-office software.

This solutions provider solved the problem by bolting on an orchestration layer that added the functionality their users needed and extended the lifecycle of many of their flagship products by half a decade.

- **A claims management company, for example, was spending 60p/minute chasing up customers for completing claim documents with live agent outbound calls. Switching to proactive chat-based messaging saved one hour of time per agent per day, while 78% of customers responded within 24 hours.**
- **For a high-street bank, IMImobile quickly integrated Messenger into their suite of contact centre channels, as its social media team was being swamped by customer service queries. Now customer satisfaction rates have soared while inbound calls have dropped 15%.**
- **We also helped a large utilities company leap up OFWAT's customer service table by delivering proactive outage alerts via SMS and automated meter readings via two-way messaging.**

“IMImobile has helped us reduce our inbound call volumes. We are now able to address a higher number of customer queries. For every voice call supported by an agent, 2.4 web chats and 6 mobile chats can be supported which means higher productivity and higher volumes of customer queries handled every day.”

VP of Customer Support, Leading BPO

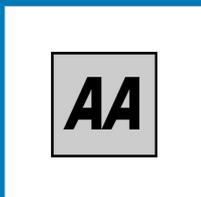
About IMImobile

IMImobile is a cloud communications software and solutions provider that enables companies to use mobile and digital technologies to better communicate with and engage their customers.

Our omnichannel platform enables enterprises to utilise the latest channels and technology to transform and automate the customer experience with minimal development time and lightweight integration.

Organisations that trust us to deliver smarter digital customer engagement solutions include Vodafone, Telefonica, Aircel, Airtel, EE, BSNL, AT&T, MTN, France Telecom, Centrica, Universal Music, Tata, the AA, the BBC and major financial institutions.

IMImobile is headquartered in London with offices in Hyderabad, Atlanta, Dubai and Johannesburg and has over 900 employees worldwide. IMImobile is quoted on the London Stock Exchange's AIM market with the TIDM code IMO.



Offices

Atlanta

IMImobile Inc.
Tower Place 200
3348 Peachtree Rd. NE.
Atlanta, GA. USA.
30326

London

IMImobile Europe Ltd.
5 St John's Lane
London
EC1M 4BH
United Kingdom

Johannesburg

Archer Digital
Clearwater Office Park,
Building no. 3, First Floor.
Corner Christiaan De Wet
and Millennium Boulevard,
Strubensvalley,
Roodepoort, Gauteng,
South Africa

Dubai

IMImobile VAS Ltd. FZE
P.O. Box 293593
Office # 624, Building 5EA
Dubai Airport Free Zone,
Dubai, U.A.E

Hyderabad

IMI Mobile Pvt. Ltd
Plot No. 770
Road No. 44
Jubilee Hills
Hyderabad – 500 033