

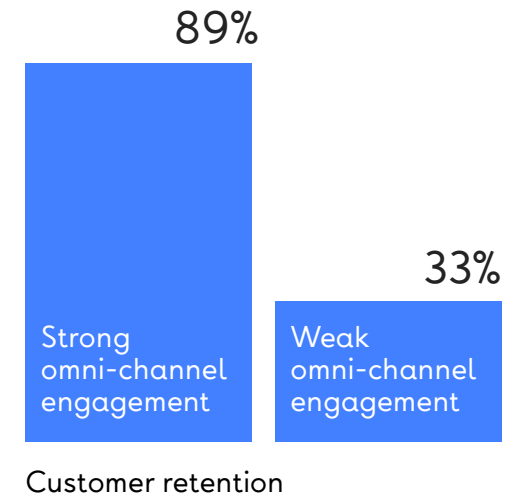
# How to implement a successful omni-channel strategy and solution



## Introduction

This is the era of the empowered and ultra-connected consumer. Consumers expect a rich and consistent experience irrespective of how they interact with a business. More than ever, deploying an effective omni-channel strategy is critical to business success.

According to the Aberdeen Group, companies with strong omni-channel customer engagement retain, on average, 89% of their customers, compared to 33% for companies with weak omni-channel customer engagement.



"A seamless, integrated omni-channel contact center solution has become essential for businesses seeking to compete on customer experience. With the omni-channel capability from NVM and the dedicated focus it has put on tight integration with Salesforce, businesses can deliver that kind of omni-channel experience – offering not only consistency, but also up-to-date customer interaction information irrespective of the interaction channel."

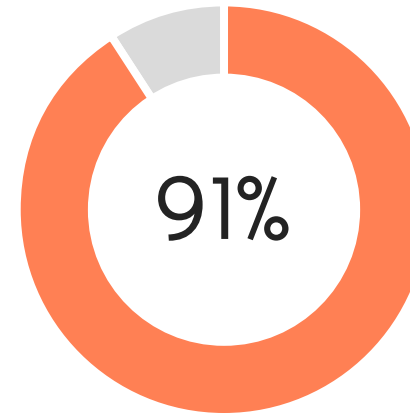
**Sheila McGee-Smith, founder and principal analyst  
at McGee-Smith Analytics**

Additionally, businesses that adopt omni-channel strategies achieve 91% greater year-over-year customer retention rates compared to business that don't, according to a recent survey.

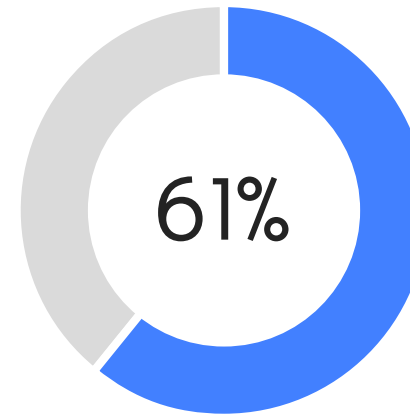
And while businesses have focused on delivering a rich omni-channel experience in the digital world, they have largely neglected the customer's contact center experience. The importance of the contact center, however, cannot be ignored.

And, according to a study by Google, 61% of mobile users call a business when they're in the purchase phase of the buying cycle. The majority of respondents would call instead of reaching out online because they're looking to get a quick answer (59%) or talk to a real person (57%).

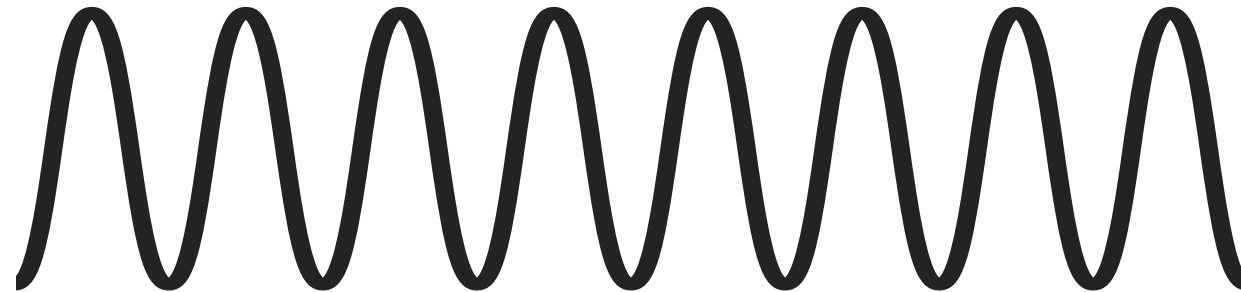
**83%** of U.S. consumers prefer dealing with human beings over digital channels to solve customer services issues, according to research from Accenture.



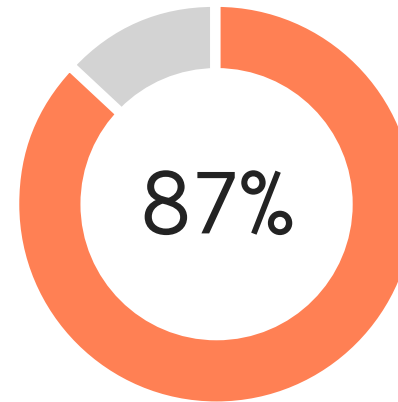
91% customer retention rate for businesses that adopt omni-channel strategies



61% of mobile users call a business when they're in the purchase phase of the buying cycle

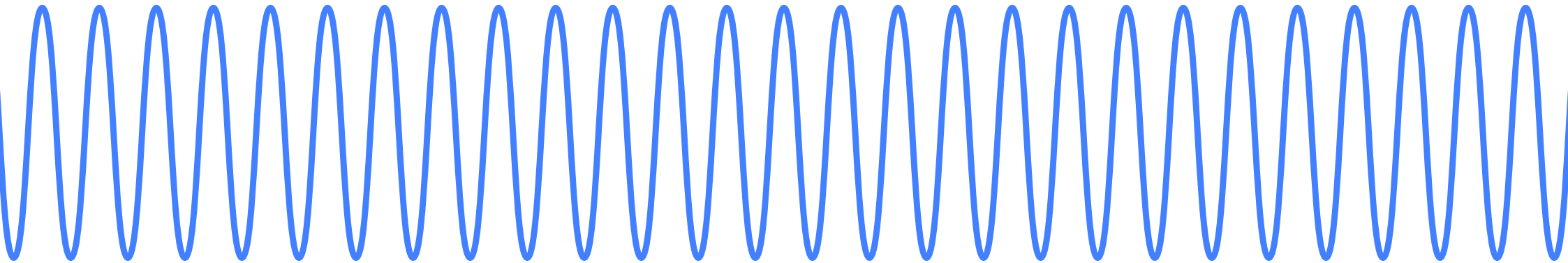


But, for many businesses, the contact center remains disconnected from digital channels. As a result, when customers call a business, they often encounter contact center agents who have no visibility of their digital, online histories or the effort they have already invested. This creates a disjointed and frustrating customer experience, and it's no surprise that 87% of customers think brands need to put more effort into providing a seamless experience. ([Zendesk](#))



87% of customers think brands need to put more effort into providing a seamless experience

So, if your business is looking to deliver a more complete customer experience, what elements should you consider as you develop your omni-channel strategy? And what should you look for in your solution?



## Current Situation

Currently available market solutions claim to offer a complete omni-channel experience – but most fall short. They focus on digital channels while excluding contact center voice channels. So, businesses end up with a “multi-channel” approach rather than a true omni-channel solution. In addition, they do not address the needs of agents or the business trying to deliver a true omni-channel experience.

Figure 1 on the right provides a view of current solution architectures.

In this architectural scenario, when customers reach out to a business through a digital channel, a digital platform handles the request, and if they call the contact center, they are directed through a contact center platform. The requests end up being routed by two separate engines with different levels of routing sophistication. They are fed to either separate groups of agents or to blended groups of agents, and the business relies on different systems for statistics to track and manage digital and contact center interactions. The result is:

- inconsistent customer experience
- inconsistent agent experience
- non-integrated reporting, analytics and workforce management
- inefficient use of resources

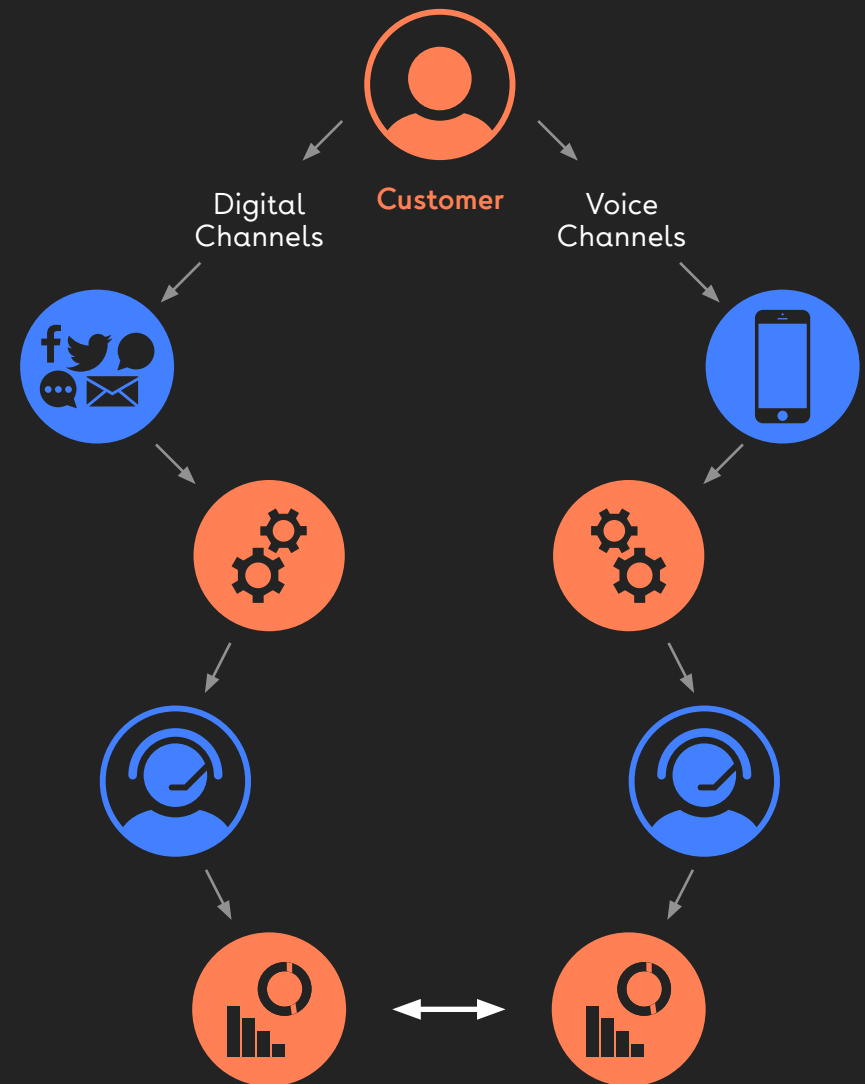


Figure 1: Current Solution Architectures



## The Ideal Solution

A true omni-channel solution should manage digital and voice channels and should address the needs of the entire business, including:

- customers
- agents
- management

### Customers

The solution must provide a seamless, connected customer experience across digital channels (webchat, SMS, email, social) and voice channels. This capability is critical because it will allow customers to switch seamlessly between digital and voice channels without any loss of context during the journey. All customer data and history should be available across every channel and without requiring extra effort.

## Agents

The solution should also consider the agent experience, enabling the same consistency provided to customers. Agents managing digital and voice channels should all have complete visibility to cross-channel interaction history. They should also be able to use a single interface for all channel operations and not need to switch between platforms to handle the different channels.

## Management

Sales and service managers must also have omni-channel visibility of statistics and reporting that relies on a single source of truth for all data. Ideally, the solution should tightly integrate with the CRM system, so it is the single source of truth for all interactions and data.

Figure 2 on the right provides a view of an ideal solution architecture.

This architectural scenario enables customers who contact the business to be routed and optimized through a single routing engine across all available pools of digital and voice resources, irrespective of the channel (if so desired). Agents have access to all available information, customers can easily move across channels without loss of context, and the business has a consolidated view of omni-channel statistics and reports.

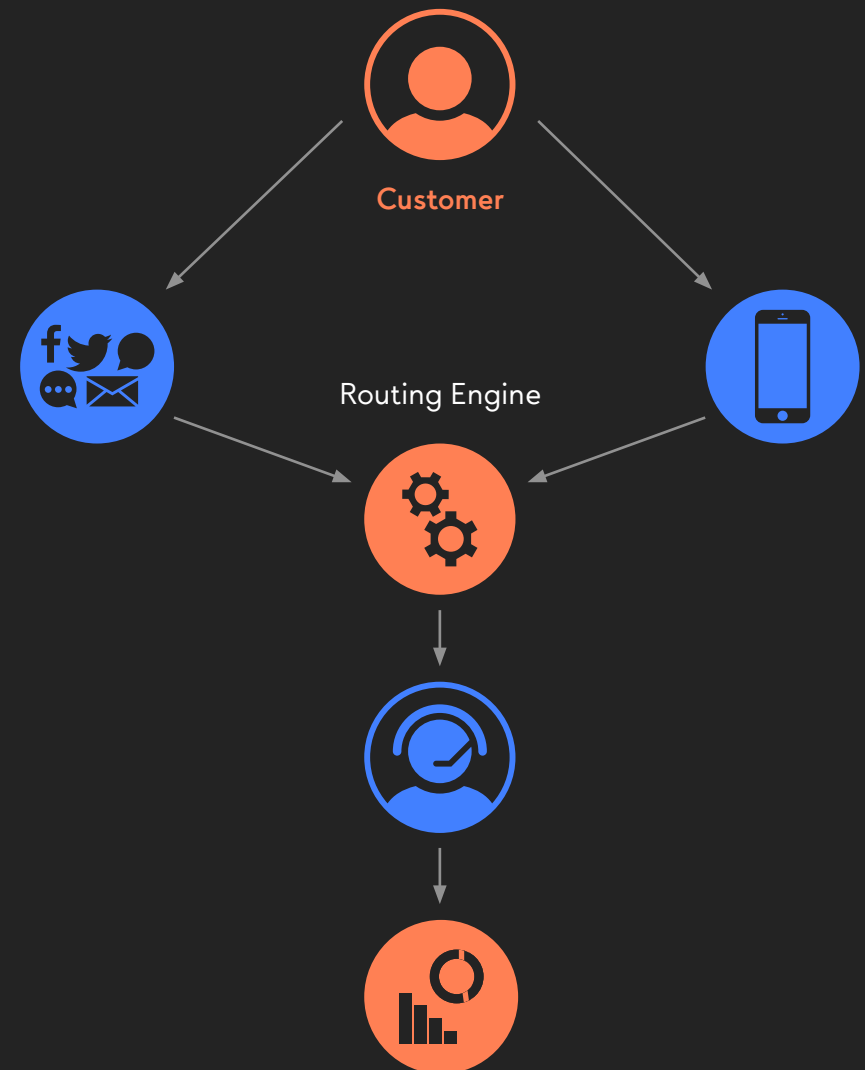


Figure 2: Ideal Solution Architecture



When you are considering an omni-channel solution for your customer engagement, create a list of criteria for evaluation so you can objectively compare solutions and pick the best one for your environment. Listed below are some to consider:

## Solution Criteria

01

### Channels supported

Leave no channel behind! Select a solution that will enable you to deliver a truly omni-channel experience. Because voice is such a key part of the customer experience, it is critical that your solution address and support not only digital channels, but voice channels as well. And, whatever capabilities your solution offers, ensure they are consistent across your digital and voice channels.





## 02

### Role of your CRM

Chances are you have invested significantly in your CRM system and all your customer information resides in it. If you wish to use the digital channels offered by your CRM platform, ensure your omni-channel contact center solution that manages your voice channels will work with your digital channels in order to maximize your investment. Additionally, your omni-channel solution should leverage your CRM as the single source of truth for all customer and interaction data. This enables all digital and voice channels to draw on the same CRM-sourced data to deliver a rich, consistent customer experience and guarantees that all agents are equipped with the same information as they interact with customers.

## 03

### Handling of routing

Use a single brain! Ensure that your solution will employ a single routing engine for all your digital and voice channels, so that when a customer interacts with your business, the available resources can be optimized across all channels for maximum efficiency. This will enable you to apply a unified business logic or same set of rules for all your channels. You should be able to apply skills-based, personalized or SLA-based routing across any digital or voice channel for a seamless consistent customer experience. See Figure 3.

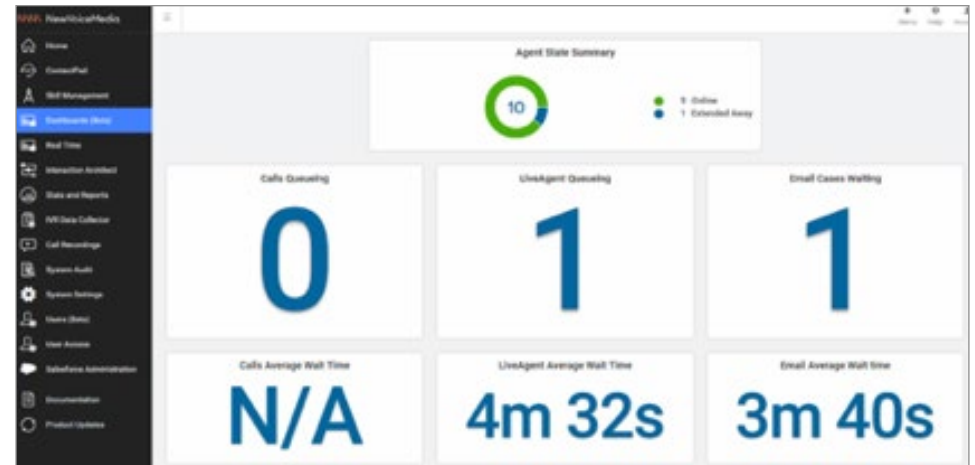


Figure 3: Omni-channel routing across voice and digital channels

## 04

**Data visibility**

Get the complete view. Your solution must provide consolidated real-time and historic reporting for customer interactions, so you have complete visibility to manage the business. Additionally, your solution's workforce management should include digital and voice channels to truly maximize efficiency. See Figure 4.

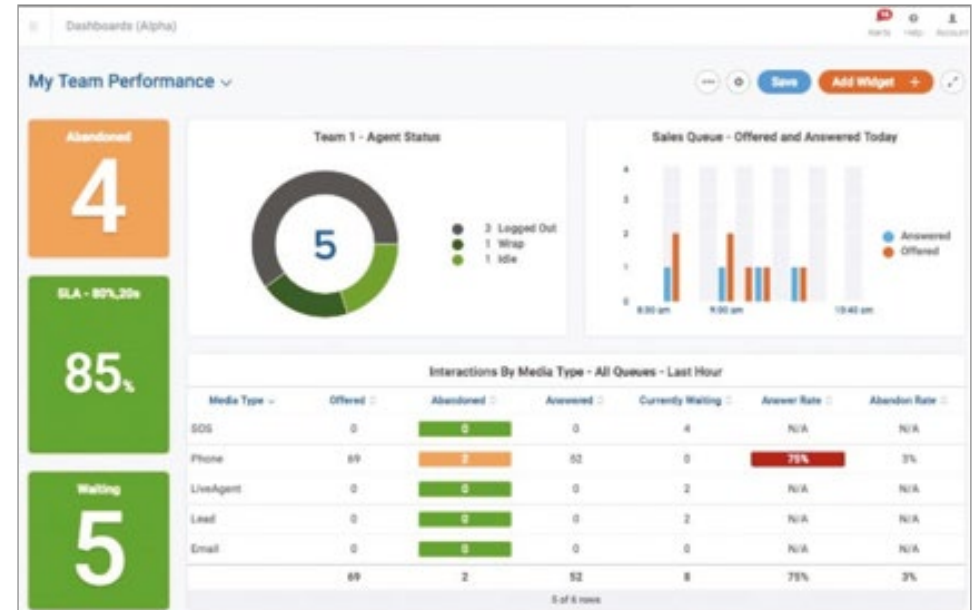


Figure 4: Consolidated omni-channel statistics

# 05

## Adoption considerations

Pick a solution that makes it painless for it to be adopted across the business. If your CRM is the hub of your operation, make sure your omni-channel solution tightly integrates with it and relies on the CRM as the single source of truth. This will minimize disruption to various functions of the business. And, if your agents operate within your CRM, ensure that your solution will not force them to use another interface. See Figure 5.

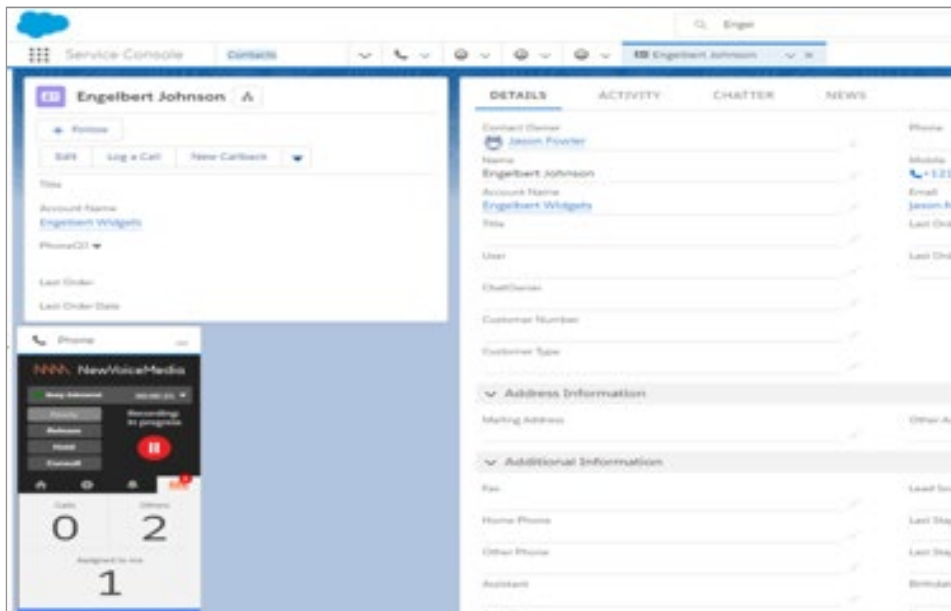


Figure 5. Agents conducts all operations within CRM

NewVoiceMedia is a leading global provider of cloud contact centre and inside sales technology that enables businesses to create exceptional, emotive customer experiences to serve better and sell more. Its award-winning platform joins up all communications channels without expensive, disruptive hardware changes and plugs straight into your CRM for full access to hard-won data.

With a true cloud environment and proven 99.999% platform availability, NewVoiceMedia ensures complete flexibility, scalability and reliability.

NewVoiceMedia's 700+ customers include Canadian Cancer Society, Ebury, FCR Media, FlixBus, JustGiving, Kingston University, Lumesse, Paysafe and Vax.

For more information, visit [www.newvoicemedia.com](http://www.newvoicemedia.com) or follow NewVoiceMedia on Twitter [@NewVoiceMedia](https://twitter.com/NewVoiceMedia).

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