



6

STAGES OF  
OMNICHANNEL SUCCESS

## If customers can interact with your brand via more than one channel then, like it or not, you are delivering some kind of omnichannel experience.

Optimising that experience for customers across multiple channels is no small task, but reducing friction is crucial to customer loyalty and maintenance, and growth of retail sales.

This guide leads you to an evidence-driven, proven and validated omnichannel optimisation solution that will refine the journey for your customers.

It takes a logical path through 6 stages of investigation, discovery, innovation and testing:



## STAGE 1

# WHERE ARE THE PROBLEMS AND OPPORTUNITIES?

You can probably already point to at least one part of your customer journey that should be better. But when it comes to omnichannel optimisation it's best to start with a blank sheet.

1. **Gather the data you already have** on your customers' experience - particularly in relation to your key touch-points and journeys.
2. **Look at everything** from customer services feedback, existing user research, persona, to cross-device analytic reports - any data that offers a window into the mind or actions of your customers as they interact with your business.
3. **Pool your data sources.** Group insights according to common themes - e.g. Which customer journeys display the greatest number or most severe pain-points? Which micro-conversion drops off on the path to conversion?
4. **Look at live customer sources.** Are the issues you can see in the data reflected in customer information you're getting from complaints or live chat feedback?
5. **Identify a set of strategic, priority areas.** Use your grouped insights, validated by customer feedback, to narrow your focus on the areas that most need attention or offer the biggest opportunities to improve your omnichannel CX - the areas where customer barriers, frustrations, unmet needs and expectations lie. But avoid looking for solutions too soon.

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## STAGE 2

# INVESTIGATE WITH REAL CUSTOMERS

You need to understand in detail how customers interact with the identified problems and their experience in these areas, if you are to have any chance of optimisation and realising the opportunities;

1. **Develop a tailored research plan.** Focus on the few key areas of opportunity you identified in Stage 1. Your plan should set out clear aims, the scope/types of research activity to be conducted; and what the purpose/intended output of each research activity is.
2. **Use triangulated user research to trace a realistic omnichannel journey.** Click and Collect is a simple example. Have customers go through the website journey with usability testing in the lab - understand what their expectations are, what information they expect. Then take the same participants in-store to collect the item, and explore their needs and expectations here too.
3. **Frame lab-based sessions according to context.** Understand shoppers' background experiences of the brand, paths that may lead to a website visit (e.g. promotional email, display ads), how website tasks fit with the overall customer goal/wider journey and what customers do after visiting the website.
4. **Structured in-store research completes the picture.** Use a structured format for tracking interactions and behaviours, ensuring a consistent capture of relevant data. For example:
  - The types of interaction that occur during customers' in-store experience;
  - Specific customer needs, met and unmet;
  - Main decision points and actions that progress customers through their tasks;
  - Instances of 'omnichannel in the moment' (e.g. kiosk or mobile use in store? And why?) if they occur.



# “ Understand the opportunities ”

5. *Use Follow up interviews and/or surveys to consolidate insights. Discuss your initial findings with relevant staff members or customers to understand why certain things happen, the underlying motivations, feelings and expectations affecting the experience.*

## STAGE 3

### STEP BACK AND SEE THE BIG PICTURE

You can probably already point to at least one part of your customer journey that should be better. But when it comes to omnichannel optimisation it's best to start with a blank sheet.

1. **Create a map of the customer journey** and overlay key findings, behaviours and pain-points over it to highlight where the optimisation opportunities lie.
2. **Make your goals and objectives specific.** Scope the problem and what you are trying to solve. Base this on areas of most influence from the data, research and journey map generated so far.
3. **Prioritise the most significant areas identified for improvement** and their associated goals or objectives. With this 'problem statement', provide key points of information to effectively guide the ideation phase and creative input, such as:

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- Which 'portion' of the customer journey are we looking to fix, refine or add value to?
- What is the basic problem to be addressed
- What is the customer expectation and state-of-mind as they enter this part of the journey
- What are the main goals of the customer at this point of the journey?
- Which touch points are currently utilised at this point?

4. **Be realistic.** In addition to the relevant CX insights, any correlated business objectives, internal barriers and limits on project scope should be reiterated here.

## STAGE 4

# CREATE SOLUTIONS, BUT START SIMPLE AND THINK AHEAD TO TESTING

This ideation phase, creative process and validation-by-testing strategy will help our business translate customer insights into proven, optimised omnichannel experiences.

1. **Cross-discipline creative process.** Having input from design, content and UX perspectives is important at this point to ensure the solution is addressing problems in the fullest sense.
2. **Surround the ideation phase with assets** to help focus and let everyone have a shared knowledge, such as:
  - Outline customer journey map (bounded by problem statement)
  - Screens/photo/quotes to recall existing experience and problems.
  - Competitor examples for inspiration and perspectives.

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### 3. Start simple and work up:

- Start with initial sketches, mock-ups that reflect the core of solution, i.e what is the new input or value being generated for the customer? This enables a focus around key requirements that can be refined through cycles of feedback from UX, design and content.
- Gradually work towards higher fidelity development of ideas, to design assets with content/interaction flow as appropriate.

## STAGE 5

## TEST AND ITERATE

Every optimisation should be based on extensive testing, to ensure it will deliver the expected outcomes, and avoid any unexpected ones. Iteration is a natural consequence of this.

### 1. Test simple prototypes. Whatever the creative content/functionality, there is a way to test - with real users:

- Recruit sample customers into the lab to explore a cross-device experience, or take them to store to visualise a journey with new cross-channels inputs.
- Testing with minimum-viable prototypes allows you to test the new omnichannel experience concept and refine the requirements, prior to spending development resource.

### 2. Gather feedback from prototype testing:

- Look at usability barriers, missed needs, user (customer or employee) opinions or responses and take key learnings back to creative iteration.
- Conduct follow-up validation testing to ensure barriers were resolved, needs tackled, and users concerns or uncertainties alleviated.

### 3. Two or three cycles depending on budget:

- Start with early sketch prototypes then revisit when you've added the UI and then take to a higher level that reflects what you understand about customers' interaction, perception and emotional response.



# MEASURE

Understanding the impact and reusing learnings is important to continued innovation and improvement over time.

**1. Set up clear, focused metrics to track relevant data surrounding the optimised experience - similar to Stage 1:**

- Site analytics, CRM etc.
- Depending upon the solution, select the relevant data source and ensure metrics are set up to measure behaviours and KPIs in keeping with the original problem statement.

**2. Keep measuring:**

- Deploy monthly or quarterly surveys as appropriate to gather relevant insight on the relevant aspect of the omnichannel experience.
- Understand to what extent the new customer experience has made a difference to customer frustrations or difficulties, the perception of service quality, connection to brand etc.

**3. What worked well, what didn't?**

- Understand where impact and influence over KPIs has been achieved - whether positively or negatively.
- Understanding which are the most sensitive touch points across the user journey by tracking impact (on sales, visits, recommendation or brand opinion) after a new solution or change allows continual improvement in business knowledge and decision-making for future omnichannel work.

**4. Record and revisit insights on customer pains, joys and noted behaviour:**

- Learnings are easily lost, so future optimisation can fail to harness previous results or insights.
- Maybe a pain point has been resolved in one area of the omnichannel customer journey - but the solution may offer insights on customer behaviour and opportunity elsewhere in the journey.



## 5. Share insight:

- *Insight can come from everywhere. In-store people are face to face with customers every day - the wealth of knowledge there is often ignored by the online business.*
- *This is especially true for omnichannel experience optimisation, so aim to build a culture which shares and invites customer insight across all levels of the business.*



## IN CONCLUSION

*Follow these six stages and you will have an evidence-driven, proven and validated omnichannel solution that will reduce friction and delight your customers.*

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