

Understanding omnichannel

Your guide to cohesive and connected customer support

Not all that long ago, customer support was pretty cut and dried. If people had a problem or a question, they typically had two routes to choose from:

1 Pick up the phone and call the business

2 Visit a customer service desk within the store or business

Today, customers have seemingly endless options to contact businesses and get their questions answered. There are still the phone calls and in-person visits, but there are also emails. Instant messages. Social media accounts. Even forums and message boards.

Customers can opt for a variety of different channels to get the support they need. But here's the important part: They expect a consistent and cohesive experience between them. In fact, a whopping 86% of consumers say they expect conversations with agents to move seamlessly between channels.

That's at the root of omnichannel support — it's an approach that offers advantages for both customers and businesses. But what exactly is omnichannel and, more importantly, how do you pull it off? We have your guide to go beyond the buzzwords so you can effectively understand and implement omnichannel customer support.

What exactly is omnichannel support?

Omnichannel support means using all of your available channels — email, chats, social media, phone calls, and more — to provide support to your customers. However, these channels aren't their own little siloes or islands. An omnichannel approach integrates all of your channels to provide a far more seamless and consistent customer journey.

Omnichannel vs. multichannel support: What's the difference?

Omnichannel and multichannel support are often used interchangeably, but they're actually two different things.

They both rely on multiple channels to provide support (which is likely why they're often confused). However, with multichannel support, those touchpoints all stand on their own — there isn't any strategic overlapping between them.

In contrast, omnichannel looks at all of the channels as a connected part of the whole so that customers can seamlessly move between channels without redundancies, repetition, confusion, or frustration.

Digging deeper with an omnichannel support example

Let's clarify the difference between multichannel and omnichannel with an example (one you've probably seen or even experienced yourself several times before).

Imagine that a customer comments on a brand's Facebook post with a question or issue. The brand responds with a templated comment directing the customer to their other support channels.

The customer follows the link and sends a live chat — and, when doing so, needs to recap the entire problem all over again. After some back and forth via chat (whether it's with a chatbot or a live support agent), they're told someone will reach out to them via phone or email. When that happens? They start all over again — repeating the issue that they've explained twice already.

That's multichannel support. It gets the job done, but each touchpoint requires that the customer starts back at square one. Omnichannel customer support cuts out those redundancies. All of the support channels are seamlessly connected so that consumers (and agents) can move between them with all of the information and context they need.

When that customer moves from Facebook to a live chat, the agent will already have an overview of the issue and be able to jump right in with targeted support. It's far less frustrating for customers and far more efficient for businesses.

The benefits of omnichannel support



As customer expectations continue to evolve and increase, an omnichannel experience has quickly moved from being a competitive advantage to a non-negotiable requirement (particularly if 86% of customers have anything to say about it).

And brands are taking notice. In recent McKinsey research, companies point to driving a simplified customer experience as one of their top three most pressing priorities. Here are a few of the compelling reasons why they're throwing their weight behind omnichannel support.

1. Better customer experience and satisfaction

As the above examples highlighted, a customer support experience that lacks any cohesion and consistency is infuriating for customers. In fact, 51% of consumers say that not having to repeat themselves at all makes for the best customer service experience.

When the same study found that 79% of customers think personalized service is even more important than personalized marketing, it's tough to overstate the importance of an omnichannel experience. Agents are able to approach those support interactions with all of the information they need — identifying information, purchase history, and past conversations — to facilitate a highly targeted and specific conversation.

That also means much faster resolution times for both customers and support team members. They spend way less time getting up to speed and searching for details — and that means more time spent fostering a positive relationship and brand identity.

It all pays off in terms of customer retention, with companies that use omnichannel experiences reportedly retaining customers 89% better than companies that don't.

2. Boosted agent efficiency and productivity

It might feel like customers are the main beneficiaries of omnichannel customer support, but support teams stand to gain plenty too — especially in terms of efficiency.

Offering omnichannel support typically requires that support teams consolidate their tech stack. That alone saves support agents time and stress as they don't need to navigate between so many disparate apps and tools.

And, as mentioned above, agents are equipped with all of the history and information they need to handle support interactions efficiently and effectively. Some estimates state that companies that offer omnichannel support resolve tickets three times faster than companies that don't use an omnichannel approach. When 80% of consumers say efficiency is the most important element of a positive customer experience, speed matters.

3. Enhanced analytics and insights

Companies also benefit from a better understanding of customer behavior. Rather than looking at individual channels and having to piece things together, you get a far more holistic view of all of your customer interactions.

That level of insight into the customer journey can be powerful for every aspect of the business. The support team can improve support interactions. The sales team can highlight the right selling points and smoothly handle objections. The marketing team can tweak the marketing strategy. The product team can adjust the roadmap.

You get the idea. A multichannel approach is a lot like having puzzle pieces strewn out in front of you — you know they fit together, but you can't quite see it. An omnichannel approach is like looking at the entire, completed puzzle.

When 79% of organizations say a solid grasp of the customer journey allows their organization to become more customer-centric, an omnichannel approach can help you get the complete understanding you need to better serve and retain your customers.

The challenges of omnichannel support



Alright, so there's no doubt that omnichannel support is the best way forward. So why doesn't every single company do it? The reality is that, much like a thousand-piece jigsaw puzzle, it can be somewhat daunting and challenging to pull off. Here's why.

1. Getting the right technology

Managing so many channels requires a lot of tools, and most support teams have a huge array of apps and software in their arsenal, including:

- CRM software
- Help desk software
- Workforce management software
- Communication tools
- Knowledge base software
- Collaboration tools

It's tough to build and maintain a consistent customer support experience when you need to rely on all sorts of disparate and often outdated tools. In fact, 30.2% of workers say using outdated systems that are cumbersome and slow is a major concern.

To offer an omnichannel experience, many companies need to update legacy systems, knock down data silos, and overhaul their existing tech stack to ensure they're set up to manage and maintain an omnichannel approach.

Ultimately, having an integrated platform to oversee the entire customer journey and all of the support interactions is easier — but the process of getting there can require a lot of time, energy, resources, and tolerance for change.

2. Training and empowering agents

For companies that have previously separated support channels (and, as a result, team members), omnichannel support will come with a bit of a learning curve. Agents will need to develop their cross-channel proficiency, as well as an understanding of any new tools that are implemented for omnichannel support.

The support team isn't the only group impacted, though — an omnichannel approach often involves other teams and departments too.

Take marketing as just one example. Marketing oversees many of the channels that can be used for support, such as social media. Research from Hootsuite found that 32% of organizations say it's exclusively the marketing team that provides service through social and messaging apps. Those team members will also need to be trained on how to provide omnichannel support.

In short, omnichannel isn't just about unifying your customer journey and your technology — you need to unify your team too.

3. Maintaining consistency

With omnichannel support, customers expect a connected and cohesive experience. Yet, that level of consistency can be hard to guarantee (particularly when there are different agents or even entire teams involved).

To fully support an omnichannel strategy, companies need to clearly outline:

Information and answers: While you don't necessarily want templated support interactions, there shouldn't be any debate over your protocols or the best way forward for customers. Put simply, they shouldn't get a different answer from different channels.

Processes and workflows: Similarly, defined workflows will help teams juggle all of the available support channels without feeling like they're pulled in a dozen directions.

Brand voice and messaging: Consistency across channels isn't just about the support you provide — it's also about what you sound like. Using a casual and conversational tone on social media but a formal and rigid tone via email is confusing for customers. Voice and tone guidelines will ensure your brand identity remains constant across all of your channels and agents.

How to implement and optimize omnichannel support

Looking at the above three challenges of rolling out omnichannel support highlights three of the major steps companies need to take to implement an omnichannel approach:

- Find the right tools to integrate customer support channels and internal workflows.
- Provide adequate training and resources to the support team as well as any other team that might handle support interactions.
- Develop standard operating procedures, guides, and other resources to support consistency across channels and efforts.

But what else do companies need to do to not only implement omnichannel customer support, but optimize it? Here are a few additional strategies.

1. Understand what success looks like

How will you know when you're not only doing omnichannel support but

doing it well? Much like with any other business initiative, it comes back to setting goals and attaching quantifiable metrics so you have clear indicators of when your efforts are paying off.

There isn't a hard and fast rule about what metrics or key performance indicators (KPIs) you need to use for omnichannel support. It all depends on your business and unique objectives. Here are a few ideas in several different categories to get the wheels turning about what targets you can set:

Customer-focused metrics

Customer satisfaction (CSAT): Ask customers how satisfied they were with their experience. Add the positive responses, divide by the total responses collected, and then multiply by 100.

Net promoter score (NPS): Ask customers how likely they are to recommend your company on a scale of zero to 10. Subtract the customers who answer with a six or lower from the percentage of customers who answer with a nine or 10.

Operational metrics

First contact resolution (FCR): The percentage of customer support tickets that are resolved by agents on the first try.

Average handle time (AHT): The average length of a customer's call — essentially, how long they need to communicate to get a resolution.

Workforce management metrics

Schedule adherence: Measures the overlap between when a call center agent is scheduled to work and when they actually work.

Occupancy rate: Measures the proportion of time that a support agent is actively working with a customer contact, either directly engaged with a customer or completing any ancillary work associated with the contact.

That's not an exhaustive list. The point is to understand exactly what you're trying to achieve with an omnichannel approach — whether that's boosting customer satisfaction, improving your operational efficiency, or all of the above — so you can clearly identify when you've hit your target.

2. Regularly review and update channel offerings

Omnichannel support doesn't mean that you can't ever go beyond the whole picture and zone in on a specific channel. In fact, it's worth regularly taking inventory of all of your channels so that you can:

- Add new channels that could be helpful
- Remove existing channels that aren't being used
- Create resources or automations to support popular channels
- Offer additional training on popular or upcoming channels
- Tweak and refine your internal workflows
- Improve upon your customer journey maps

You can use data and analytics, customer surveys, agent feedback, and more to understand how certain channels are performing and adjust your approach from there.

Put simply, omnichannel doesn't need to equate to offering and using all of the channels — it's still well worth determining which ones are the most impactful for your customers and your overall business.

3. Implement customer feedback loops

Customer feedback is always important — and that's especially true when you're trying to implement and optimize omnichannel support. You need to know if it's having the desired effect.

Your customers might not be forthcoming with their feedback (whether it's positive or negative). So, when you decide to prioritize omnichannel support, build in some opportunities to collect their insights.

Including brief surveys and feedback forms at the end of your support interactions will clue you in on how they feel about your customer experience. Combine that with data, social media comments, customer reviews, discussions on forums, and anecdotal evidence from support agents and you'll get inside your customers' heads and continue to improve upon your omnichannel support.

4. Leverage AI and automation to enhance support

Customers crave personalization and a human touch, which might lead you to believe that the robots (read: artificial intelligence and automation) have no place in modern customer support.

However, these technological advancements can further enable omnichannel support. As recent [McKinsey research states](#), “In the AI-powered care ecosystem, around 65% of tasks and 50-70% of contacts are automated, creating a true omnichannel experience that provides a consistent and seamless experience across interactions.”

From chatbots to handle common inquiries to automations to prioritize and organize customer support tickets, AI and automation aren't meant to replace human support agents in offering omnichannel support — they're meant to empower them.

5. Remember your self-serve service options

When it comes to omnichannel support, it's tempting to only think about live, real-time channels — your live chats, phone calls, emails, and more.

However, you can't neglect any self-serve customer service options you've created (like a knowledge base, help page, or other educational resources). Much like your live channels, those need to be integrated as part of an omnichannel approach.

The same [McKinsey research](#) found that, while 77% of respondents report that their organizations had built digital platforms, only 12% of digital platforms were highly-integrated.

As you assess and take stock of your channels, make sure to include your self-serve ones too. Those need to be evaluated and updated just as frequently as your real-time support channels.

An omnichannel customer experience: convenience, consistency, and cohesion

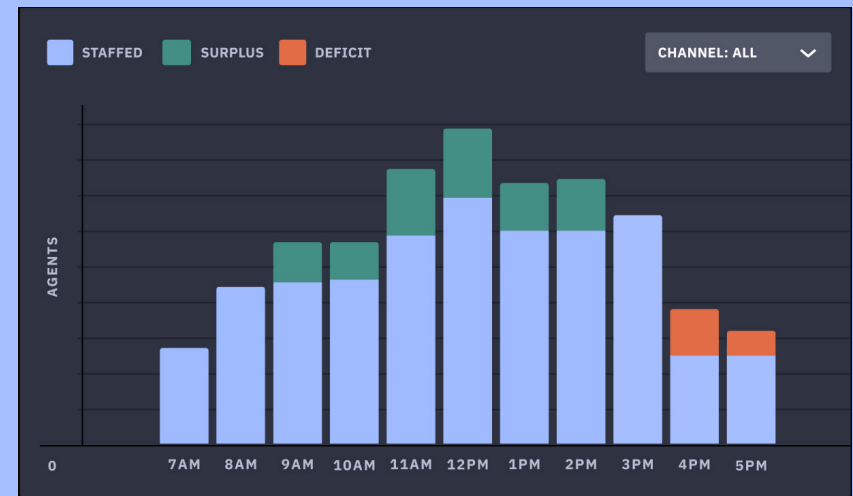
Not that long ago, customers didn't have many options for support interactions. But as more and more channels continued to crop up, most support teams were left to play whack-a-mole—adopting those new channels to keep pace with customer expectations.

When embracing a truly customer-centric mindset, it's not enough to have those channels—they need to be thoughtfully integrated and connected. They should feel like different stops on an overall journey and not different destinations entirely.

That's the value of omnichannel customer support. It offers the undeniable convenience of numerous support channels—balanced with the cohesiveness and consistency that today's customers not only appreciate, but expect.

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