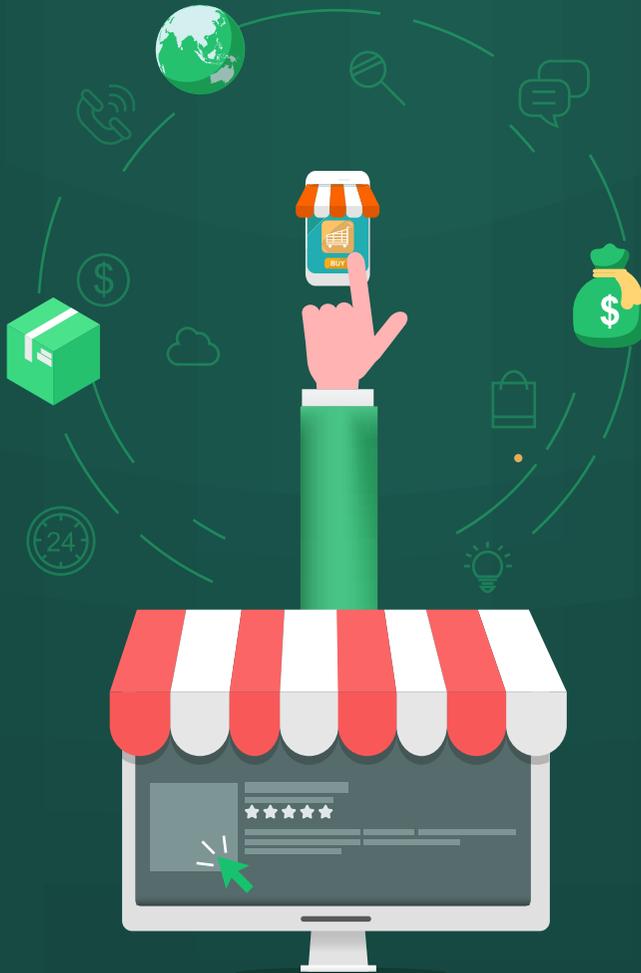




# Health Check: Is Your Team **Omnichannel** Ready?



Planning to launch an **omnichannel** support strategy for your business? Already running an omnichannel program but want to confirm you're on the right track? For omnichannel success, you need to provide your customers with coverage across a wide array of channels, a seamless experience for every channel they use, enhanced mobile access, and a strong, personalized agent interaction.

## **How to use this checklist**

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Fill out the twelve-point checklist below, giving yourself one point for every box you can check off. Don't just assume you can tick every box - take the time to walk through your customer support experience as a customer would. Then compare your score at the end, to see how your omnichannel readiness stacks up.

## **Channel Coverage**

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Covering multiple channels is the first step towards a winning omnichannel strategy. It's critical to have a plan for traditional channels and social media channels in addition to self-service options, which are rapidly becoming the preferred service channel for most customers.

- ✔ Currently providing coverage on one or more traditional channels, including live chat, phone, or email.
- ✔ Currently providing coverage on one or more social media channels, such as Messenger, Twitter, or Instagram.
- ✔ Currently offering an up to date knowledge base for self-service assistance.

[Read more about channel coverage for omnichannel support](#)

## Integrated Experience

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Customers are quickly turned off when they need to repeat information or are told they should use a different channel to have their concerns addressed. It's important for companies to provide a **central location where agents can view all available channels along** with customer history to provide a seamless omnichannel experience.

- ✔ Customer information is safely and accurately passed between channels without disruption to the customer.
- ✔ Customer history is available across channels so each agent is able to pick up a request without asking customers to repeat information.
- ✔ Customers receive answers in their original channel, even if the agent is responding through a separate system on the back end.

## Mobile Access

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Customers expect companies to offer **multiple channels for mobile communication and support**, often looking for dedicated iOS or Android apps. A specific mobile strategy is crucial for a strong omnichannel support program.

- ✔ Currently offering at least one SMS-focused channel.
- ✔ Currently offering support through a dedicated app or app-based widget.
- ✔ Currently providing mobile-optimized web pages for self-service tools and contact forms.

## Quality of Interaction

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When customers do need to contact your team, they expect to be delighted with the **friendliness and knowledgeability of your agents**, as well as the low effort needed to solve their concern. A winning omnichannel strategy starts with a well-trained team who have the right knowledge and tools to deliver knock-your-socks-off service.

- ✓ Agents have access to internal documentation, A.I.-enhanced search, or other troubleshooting tools to minimize delays in resolution, without needing to escalate to another team.
- ✓ Agents add value during interactions by customizing solutions based on customer history and preferences. CRM data is integrated into your help desk software.
- ✓ Agents receive on-going training to customize responses and approaches to resolution to deliver a friendly and knowledgeable experience.

## Score

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### ✓ 6 points or less:

Your strategy could use some focus! Start by determining which channels are most important to your customers and begin talking to them there.

### ✓ 7-8 points:

Your strategy is taking shape! Review your metrics and customer feedback to see where you can reduce customer effort, especially when moving conversations between channels.

✓ **9-10 points:**

Your strategy is strong! Make sure your technology and training programs are aligned with what your customers are really looking for.

✓ **11-12 points:**

Your current strategy is a success! Keep talking to your customers and make sure your strategy evolves along with their preferences!



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