

## Omnichannel Best Practices

1. **Customers who buy from multiple channels spend more than a single-channel shopper.** When customers can shop and interact seamlessly across all your channels, the revenues, loyalty and lifetime value of these customers will increase – often dramatically. Your customers will convert at higher rates, return to your stores, website and catalog more often, and spend more – 4x more than a single channel shopper – if you have a strategy and infrastructure to support a omnichannel experience.
2. **There are as many channels as you think – maybe more.** It's no longer just about stores, ecommerce and catalog. Mobile and social have rapidly ascended as revenue drivers and customer touchpoints alongside more traditional channels. Don't assume that you will drive more revenue – regardless of where the cash register ultimately rings – from your website than your mobile or social presence. It depends on your business and your customer.
3. **Prioritize the most valuable channels within your omnichannel strategy.** If you have multiple channels you will have different priorities and should plan your strategy and investments appropriately. Your objective should not only be to maximize your ROI based on whether you are primarily a brick-and-mortar retailer or a web retailer – but also with an eye towards where your greatest opportunities are for driving future profitable growth in terms of revenues and customers.
4. **Creating an omnichannel experience is about knowing who your customers are.** Demographics, psychographics and sales data are important. But knowing what your customers prefer and buy – when, how and where – is the core critical data. Do customers near stores behave differently? You cannot assume Facebook and Twitter are less relevant to a mature baby boomer – or that young customers will embrace these same vehicles. Analytics, testing and careful allocations of spend across proven channels and newer options in this evolving landscape are critical.
5. **Planning for multiple channels and cross-channel interaction is an art and a science.** Customers may want to research or order online and pick up in-store, locate your closest store on their phone and find out what's in stock, or see if their friends like their selections and then order the item via Facebook. Customers are crossing channels in many directions, so enabling this experience can win incremental revenue and build loyalty.
6. **Branded manufacturers, wholesalers, retailers can all win.** Branded manufacturers and wholesalers need to balance driving traffic to retail partners while managing channel conflict. Department stores may have unique potential to regain prominence in the retail world and maximize store revenue from cross-channel traffic.
7. **Extend your digital offering.** Store assortments need not be limited by the four walls. 'Extend your aisles' and leverage enterprise selling with kiosks, tablets and special order capabilities – whether assisted or self-serve. Inventory need not be limited by store stock or even your own DC – ship-to-store, ship-from-store, intra-store transfers and drop shipping can increase overall company turns as well as capture sales of goods never held in your own inventory.
8. **Inform customers across touchpoints.** The ability to inform, advise and convert your customers in store or in the call center is no longer constrained by the experience and acumen of your floor staff or customer service reps. Astute content management and alignment of promotional opportunities across channels, as well as use of QR codes and CRM tools, enable you to maximize the ROI of available offers, provide deep product content and realize cross-sell and up-sell opportunities.
9. **Break down silos.** The mandate for collaboration must flow from the top of the organization, and the cross-functional and cross-channel integration required for success needs to be developed and fostered at all levels and in all directions of the company. The right organizational structure, operational alignment, resource planning, incentives and metrics for team members are important.
10. **Leverage strengths of each channel.** Each channel has its own unique advantage in creating a powerful customer experience. The web provides rich content and personalization, stores offer live customer assistance and tactile products, mobile offers convenience, guided shopping and loyalty. While it is difficult to fuse all channels into a consistent offering and customer experience, know what you can achieve and leverage it to your advantage, such as tailoring the merchandise and service offering.
11. **Many channels, one brand.** Make sure your brand message and value proposition are consistently communicated and coordinated across all your channels and touchpoints. The availability of multiple channels provides greater opportunities to reinforce your brand and create a deeper relationship with your customer.
12. **No single provider offers a complete spectrum of solutions.** You should review each type of solution and each vendor to understand how it will enable your omnichannel strategy – whether that is a new capability, a more efficient process, an easier way to manage, a reduction in cost, or a foundation for a longer term goal.

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# eCommerce Diligence™ Checklist

## Omnichannel Key Questions to Ask Providers

### Company

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1. How long have you been in this business?
2. How many clients have you sold? How many have you lost, and why?
3. What type of clients fall into your “sweet spot”?
  - a. Do you consider your solution to be best for small, medium or large businesses?
4. What peripheral or supporting services do you offer (e.g., design, customization, integration)?
5. Can you provide case studies for 3 clients in my vertical?

### Products/Services

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1. What is the breadth of your offering for an omnichannel solution?
  - a. Cross-channel marketing & commerce
  - b. Enterprise fulfillment
  - c. Clienteling
  - d. 360-degree customer care
2. Do you have more experience with stores, online, mobile, social, or catalog retailers? B2B vs. B2C?
3. In what ways are you helping lead your clients to implement better solutions? What strategy services do you provide?
4. How well have you integrated with legacy systems or other providers to help build out an omnichannel solution?
5. Do you offer professional services to assist with implementation or integration with existing systems?
6. Does it typically require a lot of customization to integrate with existing systems?
7. Can your solutions accommodate many different kinds of data inputs and outputs?
8. Do you recommend a middleware layer?
9. Does your solution typically require significant business process change? How do you help address that?
10. What is your typical timeline to complete implementation?
11. What skills does my organization (or hired third party) need to implement this solution?
12. What type of training do you provide to use your solution?
13. What technical support services are available?
14. Is your support team located in the US or abroad? What is your SLA for support issues?
15. What ROI should I expect from implementing your solution? How do you compare on a TCO basis with your competition?

### Features

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1. What key features are included in your solution?
2. What unique differentiating features do you offer? Name your top 3.
3. Is there a key feature you have that none of your competitors have?
4. What features are currently missing that many of your competitors have?
5. What features are on your roadmap?
6. What is your product’s competitive advantage? Why? Price? Features? Ease of use? Flexibility? Don’t say “all”.
7. Is your platform geared strictly to B2C sales or is there special B2B functionality available as well?
8. How does your platform address the evolving security standards?
9. Tell me about why (each of) your system component(s) is better as a standalone solution or as part of your integrated offering.
10. What redundancy and disaster recovery do you have in place?

### Pricing

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1. How do you price your solution?
  - a. Are there different pricing levels?
  - b. How often are upgrades deployed?
2. Do you provide upgrades based on your product roadmap?
  - a. What drives your roadmap?
3. How do you charge for annual support? What about maintenance?
4. Are there any additional fees (e.g., implementation)?

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