**Omnichannel Marketing for Small Businesses**

Hello, Alexa thank you for having me. Thank you for the introduction. Let's get started. Thank you for being here. Welcome to Omnichannel for small business where I will talk about how you can embrace Omnichannel to deliver great experiences for your customers. We will talk about what Omnichannel is for those who don't know.

We will talk about why you should care about it and run through some examples and give you tips and tactics to help you get started on the path.

To begin, what is Omnichannel? Why should you care about it? If you go and look up the word on Google you will find no shortage of explainers, articles, explanations, definitions . Already you will find articles about why Omnichannel is dead. You will find articles on why you must embrace it or get left hind. You will find a lot of information. What I will try to do is boil some of this down to a more meaningful descriptor. Omnichannel has gotten out there is a buzzword. It does represent something meaningful and something important users are starting to expect and customers expect from their organizations both on and off-line. Here at phase 2 [Indiscernible] creating a personalized frictional eyes and continuous experience regardless of channel, format, location or device online it off. Simple, right? A lot of words in there. Personalized pics so users are expecting an experience that speaks to them. Frictionless meaning they don't have to start over when they change from one channel to another. The experience should feel the same whether on the mobile app or in the store. Contextual, the experience knows where I am. It knows where I come from. When I get reminders from you they are relevant to where I am may be in my purchase or checkout process. Continuous. There's not huge gaps that leave me wondering what is going on and where am I in the process. Regardless of channel, format location and device online or off means Omnichannel is thinking about content and customer experience that bridges an entire journey from start to finish. It is a way to meet your users

needs throughout their entire interaction with you. Their interactions with you go beyond the website or just the store or a phone call. That is not just digital experiences in your platform. There's a part - - there's a word not on here which I want to talk about which is data. Data powers you are Omnichannel experience. We will get into that later on. That's my little\* for this slide. How is this different from multichannel? Multichannel is simply representing your brand across multiple channels. It's where most brands are today. You have your website. You have your mobile , optimized responsive site. Maybe you have a mobile app. Maybe you have a twitter account. You are representing yourself in various places. As you can see, in the multichannel one, these channels don't really cross over. When I interact with you want twitter that is nothing to do with my interactions with you when I walk into a store or a website. Omnichannel is about creating a unified experience. It's about having communication with an organization between an organization and customer that crosses over boundaries. That tries to get out of those silos so when I interact with your brand over your mobile site it's a continuation of the experience I had in person. A continuation of the experience I have I post a question to your Facebook page. It means it should feel like I am talking to the same person or the same organization of matter where I am. Speaking of things like Facebook and twitter I want to throw this out early, just setting up a Twitter account is not Omnichannel. How you use it that is on the channel. Being responsive and really existing on these channels is Omnichannel. Another tidbit I will throw in is that I hope you don't come away from this thinking we need to spit up more channels. You want to be careful about where you do spit them up because once you establish a presence in some places once you establish a Facebook page or Twitter account, there's an expectation on the part of your users that you are going to be there. When you are going to put your flagpole in the ground make sure you actually have the resources to represent yourself. >>

A couple examples to explain the concept. The world of pizza is a great place to learn about Omnichannel. Dominoes started this anywhere campaign. It lets you order and track your - - order pizza and track your status from pretty much anything. I will show a video in a moment that helps explain it. Across a variety of devices and channels and context basically anywhere you are from a car to your smart TV or your wired home you can not only order pizza but order by texting the minimal G once you set your account up but you can track the status of that. This is an extreme version of Omnichannel but it helps illustrate the point. Another point is you can get silly with Omnichannel. In part as a response to dominoes and all the good press they got, Pizza Hut came out with a limited set and I think they only produced like 60 or 100 of these speakers called pie tops. It lets you order the pizza by clicking on your sneaker. Maybe not the most realistic example of meeting a need that was out there, but it does illustrate the point that the thinking behind Omnichannel is being anywhere and everywhere. Not necessarily in an intrusive way but making yourself available. I will show the video in a moment to explain this. May be a more realistic example for some of you may be if you see something cool on your Insta Graham feed they see a great picture of your product in action. From there they go to your website and that has analytics set up so it knows they came from your Insta Graham feed and maybe later on they go into a store and they scan info bars into the store. And that pulls up something on the mobile device that gives them information on the product. They buy it and treat it - - tweet about it. If you set up your data properly you can capture the information and track the journey and see how the channels contribute to creating one piece of experience. The video is not narrated but it will show you all the ways you can order a pizza and track status through dominoes.

[ Video Playing ]

[ Music ] >> At this point you may be thinking, so what? I can order a pizza through my car what does this have to do with me and my small business? The answer to that lies in some statistics I want to show you. Users are expecting more today than ever before. Studies showed

73 percent of consumers now perform online research before setting foot in a store. I think a lot of this we know intuitively because we do it ourselves. That online time sets expectations. They are spending a lot of time with your brand before they ever interact with you in person. Assuming you have some sort of brick and mortar presence.

They are expecting something. They expect their future interactions with you to match what they experienced so far. Even if you don't think about it your customers are. Even though they are probably not using that word, they are expecting the next time the interact with you for to feel and sound the same way it did when they were doing all of that research. The time they spend with your brand is teaching them who you are and its setting an expectation they will have a certain amount of friction if you don't need it.

As you can see through these graphs but essentially consumers are demanding personalized experience.

62 percent of consumers personalize their mobile web experience at they want website content that speaks to them. They want reminders that are set up for them. Promotions and product offers. They don't just want to subscribe to your standard email is they want emails relative to their interest. They don't feel like telling you a ton of information about themselves. They want you to know. It's interesting we will talk about this but there's a fine line between what users want you to know about them

and then on the other side of that line is getting the sense you now know too much about them. I don't want to make it sound too easy. There is a lot of care and thought that goes into it. Ignoring it means users are going to feel like you are not catering to them and the way they would like to be catered to. You can even see 28 percent want their layout to be optimized. There's definitely an expectation they want to be met where they are. They want content to be personally relevant.

As you can see here, consumers are spending more time with digital media. 2010 versus Internet usage 105 percent up everything else is trending downwards. Everyone's online and using social media more. Everyone is on their phone. You don't need these charts to teach you that. This is intuitive. We know this because we are doing it. What that means for consumers is all of this daily behavior is beginning to set an expectation. If I am on Facebook already I want a brand to be there I don't want to brand intruding on my feed with advertising but what I want to get help with something I don't want to go to your website and find your help page and then find the area I am looking for. I want to write a question on your Facebook page and get an answer. Consumers want you to be where they are. They want you to be ready for them. Ready to help them through their journey in the places they are spending topic they want to interact with businesses on their terms using tools they know and use everyday.

Good credit - - good for consumers. They want this what happens if you ignore? Everyone wants to be catered to but what if you don't do it? I would say the risk of ignoring Omnichannel is sort of summed up neatly by this quote. Nearly half of US online adults agree they tend to shop more with retailers that offer consistent customer service both online and off. The key word here is consistent. If you are not keeping up with changes in consumer behavior, you are not reaching your audience where they are essentially it means you don't reach them. They want to shop with you when you are offering a consistent experience. This quote says online and off-line. I think you could replace this with across channels. Every place I want to interact with a brand I want to get a similar feeling. I want the same level of service no matter what channel I am. Channels look different from the business side.

They are managed differently. Sometimes they are in different departments. From a consumer side, I want things to feel consistent. It's a disconcerting feeling to feel like you are talking to a different person or a completely different brand every time you interact. That can build friction which leads to customer dissatisfaction which leads to people going somewhere else. There's also a danger with inconsistent messaging. If you have a website that has a very corporate tone a little button-down maybe a little professional maybe not too jazzy. Not too much personality. That's fine but if then your twitter account is - - if your twitter account is run by someone infusing a lot of personality into it and has a sense of humor and is engaging. That's great. Except now you've introduce cognitive distance. It sounds like I am hearing two different people. That inconsistent messaging leads to a loss of confidence in your brand. It leads to friction because people feel like they are talking to two different entities. If I get this warm and fuzzy feeling from your twitter account and call you to make an order and get a different tone and experience, that is offputting. I think an easy way to illustrate this is to think about when you call the cable company and you enter all your information. You get that recording. To help you please enter your account number you do that. You wait. What happens? The first thing they ask you when they pick up the phone is please enter your account number. Then they transfer you to someone else and say what is your account number? Every time that happens they are introducing friction into this process. Every time they introduce friction people get angrier and angrier and they begin to lose confidence. So Omnichannel thinking as a means to help you avoid this problem. It helps you build confidence with your consumers and customers helps you connect with them and it helps you seem like a continuous entity across channels. So how do you do it. What are the pieces that go into Omnichannel. The two pieces that are simple we talk about this we are talking about channels and touch points. Channels are nothing more than the means of an interaction. The channel across which interaction takes place. Examples might be a customer service hotline or a brick-and-mortar store. The mobile app print materials mailings each one of these represent the channel you could be present on.

Your social media channels and your marketing these are all channels. Already you might be thinking there's a lot to keep track of. There are and we will talk about how to make sure they are in the same place. And that you are representing yourself across the same way. Touch points are specific points of interaction. For example when someone calls customer service that is a touch point. If I may can input recent visit to a store that is a touch point. When I open up your email newsletter that's a touch point of Facebook post a mailing, the online checkout process opening just a page on your website all of these are touch point. Touch points happen across channels. Really Omnichannel doesn't have to be big and scary and fancy. It's just beginning by taking account of what channels you have, and making sure that every touch point across them is aiming for a certain level of consistency. Consistency is a keyword. If you can represent yourself across touch points you begin to feel and sound and act like a cohesive unit which makes you feel like a person. This makes customers feel confident and comfortable talking to you and interacting with you. Let's show an example here. Of someone who's doing this well. Since this is for small businesses I picked the smallest business I could think of. It's a little group you may have heard of called the Disney Corporation. Disney is doing a great job with this. When you go to the park you will find the website is fully responsive and adapts to visuals sizes without sacrificing identity or performance. You can plan a trip to the park even on a mobile device. You never get to the point where it says you have to go to the desktop site. Do the whole thing from a mobile device and then you can use the experience tool. You can plan your trip and manage it once you book that you can add dining plans and purchase a fast pass that get you to the front of the line. You can make your hotel reservations and handle everything. You can leave off in the middle from your mobile phone. You can call an agent and say here's my reservation number I want to pick off where I left off. You're not constantly starting over. The experience feels consistent and seamless across the channel. The data carries over from one to another so you are not starting fresh each time. The real magic comes when you are in the park . When you're in the themepark you can have when you can purchase a thing called the magic band. Essentially it's about the same size as a fit bit. He goes around your wrist. It's a piece of off-line - - in person analog equipment. It integrates with your profile. You got it when you get to the park. It acts as your room key it opens the door to your hotel, it acts as storage any time you get your picture taken with a character in the park. It will get stored on this and you can go later and check out and view the photos and the thumbnails. It acts as a food ordering tool. You can be in line at a ride and maybe your kid wants to get burgers you can order burgers through this thing. And then get to the front of the burger line and they scan it and here's your food. It's integrated with your fast pass so it knows you are allowed to do this. They have taken all this data about you from your online experience and it creates an amazing customer experience. It's representative of the brand. It seamless and frictionless. It's probably also expensive to implement. What do you do if you don't have Disney's resources? How can you get on your way to Omnichannel? Steps you can start with now we're looking at data and personas and user journeys. There are steps you can take to get into Omnichannel or get yourself on the path

without having to outlay a huge investment in technology or people. The point of a lot of these is figuring out where you are now. And then planning for where you want to be. Omnichannel thinks about your content strategically. I sometimes call it content strategy on steroids. It's a way of thinking about how your content serves your customers and brand. Across different channels. And within different channels. The first piece I want to talk about is user persona. Content without thinking about users is decoration. It sort of your best guess as to what content serves you. The first thing I recommend is to spend time doing user personas. These can be fairly low fidelity you don't have to spend a lot of money to create them. This screenshot is one example. There are different ways to do these. The point of a persona is to try to get a representative set of who some of your biggest types of users or customers are. It builds on data you have. It's about people who use your service. What technology or channels to these. What motivates them? Why are they coming to? Did they try one of your competitors first? Why are they with you? Or when they come to you what frame of mind or the end? Outside of your business what other businesses are they interacting with. What are their demographics? What languages do they speak wax if you don't know all of this information or if you can't glean it from your analytics, you can make the best educated guess which is better than not having personas at all. And/or, you can pretty cheaply put this with your users and asked them for information explain you're trying to make their experience better. Users will often offer a little gift card or a hat something like that. You can usually get people to spend a few minutes giving you some of this data if you don't make it too long and onerous. Your analytics will help you fill out a lot of this. And then talking to real users will help you finish out the rest. Once you have a handle on who your customers are, you need to think through their journey. What is their path looking like on their way to using your product or your service? The goal here is to understand the context that your customers are operating in. You can identify the gaps where you are not there. Those gaps introduce friction. Friction erodes trust. A good user journey would include both online and off-line interactions. Maybe someone starts by - - they will also include interactions that have nothing to do with your brand. You are not there yet. Maybe those gaps are places you want to fill in. If I buy a new TV, the first thing I do is talk to a friend who has one that I like. Maybe I do some online research. Maybe I go to a store. Maybe I go to the website of a manufacturer and compare different models. ABI go back to the store . My journey doesn't and once I have the TV. I have to get it home. Either delivered or picked up . I have to unboxed it. Maybe I need help installing it on the wall how easy is this to onboard and now we've gone from hardware to software. Had have to enter the information on my accounts. Can I customize this? Do I need to call customer service? All along the way, we want to think through what are the touch points? What steps does a customer have to take? We know a little bit of doubt the demographics and the frame of mind and what else influences them. The user journey is a good place to think about how are they feeling? What is there sentiment? Is there a risk of losing them? Is there a step where they are likely to bail out if we are not there being supportive. Even a simple process can turn emotional. The fourth time I have to tell the cable company my account number my emotions are now in a much more higher state than they were when I first called. Maybe all I wanted to do was ask about different Internet packages. But now am angry. It's important if you know that and you know what sentiment they have or what the risks are or where to channel your efforts. Data on it.

Data audit. That looks like looking at the data you have and what you know about your customers. How can you inform the Omnichannel experience you are not designing in the dark. Data can be the driver that enhances the customer experience. Some caveats with data is it's important as you are responding to what you know about your customers makes you keep your data anonymous and take into account privacy concerns. Make sure it's relevant to your users and the journeys. If you open up your dashboard there will be a lot of information in there are not all is relevant. A side benefit of crafting user journeys is that they help you understand which data sets to look at and what pieces of data are relevant to your users and to their journeys. User sign-ups. They are part of the journey that you have data about online checkouts. Conversion trackers. Sales tunnels. There's different places you can see what data you have and you can really gain insights thinking about that data differently. Thinking about it in the context of a journey. That's a helpful frame for how to deal with a massive data. Once you have this in place, we recommend embarking on a channel audit. This will tell you how far along you are. It's essentially an assessment of start with your user journey you mapped out and then see where are we present we - - where are we meeting a user along the journey and where are we not? If a user is googling around for information, are we hitting the right keywords? Is it optimized to insert the brand into that process. You're looking across your existing channels and social website and all the ones we talked about before to see is our messaging consistent? What is the maturity level of each one? Are we for example I mentioned don't just set up a twitter account to have one. If you have when you have to use it and be responsive. When you respond are you using the same words and messaging we are on the website and print materials when we talk to people on the phone or email them. Is our user experience the same. When I use the mobile version of the website doesn't feel the same as when I use the desktop? Is the tone and voice consistent? Is the content consistent? Even going above messaging to overall am I seeing does it feel like I interact with the same brand? And it still somehow surprising to me nowadays brands it feels like a completely different person or set of people are running the website versus the social media account versus the email. In small businesses I found some of this is alleviated because typically there isn't the IT or marketing team. These are may be a few people rather than giant departments as they can be in some larger businesses. It's still easy to fall into silos. That inconsistency can creep in. Part of what you are auditing for is not just what's our level of maturity, but how consistent are we across each one. It's also good to go back to analytics to see what's performing well? What is our engagement metrics?

This way you can see how one channel come - - conforms compared to the others. If you don't have the resources yet to utilize something to its fullest extent.

All this leads me to being Omnichannel. I think of it that Omnichannel is not something you do it certainly things you do but once you've done those it's not like you certainly are Omnichannel. Being Omnichannel, involves a cultural mindset as well. It's a way of thinking about communication and customers and data. As I said even small businesses and silos can creep in. People can feel more ownership than they should over a given channel or data set.

Being Omnichannel means adopting a mindset of looking at things holistically and looking across channels and across your data. Trying to be open to what you see. Trying to be overall consistent and customer centric.

The strategy part as I mentioned is thinking about where do you want to end up? What are your goals? A lot of businesses tend to overlook it. Where you trying to go? Let that informer you target your efforts. What is your strategy?Omnichannel thinking is a great framework for running experiments. You can briefly invest in a channel and see what kind of engagement you get. If you are getting nothing, it's okay to pull back. It's okay to try something new . If your tone and voices and consistent across channels, and you don't know which one is right, pick one and try it across for a while. It's totally okay to experiment. Customers will forgive experimentation, more than they will forgive you not being there with a need you to be. Or inconsistency across channels. Omnichannel at its core is informed by data and manifests its content. Content needs strategy. I'm a little biased as a content strategist but it's trumping - - something I strongly believe. >> Set your data free. Break it out of its silos. Share it across your company. Have an open mind. Try to be open to what you might find in the data. What you may not find may not be good news. You may think we have a great twitter account or 10,000 followers. When you really start to dig in and your thinking strategically about what you are doing with them are they actually doing anything? Are these followers buying things or interacting? Are the engaging with you? Are you responding when they need help? Are they funneling into whatever conversion metrics you set up that matters. That is how you want to be thinking about your data as you look at things. Be willing to experiment and try new things. In the name of Omnichannel. There's a final piece of this which is a culture piece. As I mentioned Omnichannel as a way of thinking. You don't do Omnichannel it means having a cultural - - having a culture that encourages experimentation, openness, try new things maybe some of those things will fail it and encourages honesty about what's working and what isn't. It encourages basically being okay with not knowing. The data can only take you so far. You don't know if you've mapped out that journey correctly. Be open to and be willing to going back and revisiting these things. Keep looking at your data it's not a one time thing this is not - - this is part of how you operate. It's revisiting them see you can craft your message to your customers. So you know you are meeting them. We say organizational culture eats strategy for breakfast and we've added lunch and dinner because we think it's a port. Be willing to learn. Be willing to try. Be willing to fail and pick yourself up again. With that, we are not going to be around live in person. If you have questions, please send them to at phase 2 or at Jordan Hirsch on twitter. We do have a few questions that have come in.

Thank you so much, Jordan. We will start the Q&A portion of the call. I will be reading the chat questions that are participants have sent in. Please note we don't have time to get your question, I encourage you to connect with a SCORE mentor after the webinar. Mentors are available online or in a chapter near you to help you apply the strategies that were presented today. With that, let's jump into these questions.

How do you measure the impact of a Omnichannel strategy?

Great question. That comes up a lot. The first thing I will say is if you get a chance, take a look on the Phase 2 blog. My colleague Karen Snyder has a long post on this. Rather than overburden you with a long post, I will say two things. One is there sort of two ways you can measure what's going on at your channels. There's the top down or you can look at conversion rates and your finals. You can look at and results which is the top view. That's what the end result of a lot of these interactions is and see are these numbers trending in the right direction. There's the bottom up. Where you look at numbers like Twitter followers and page views and repeat visitors and different pages that matter. How are things trending on those pages. You can get granular and you can look at the big picture. You have to look at both at once to see the connections. If you want to spend a lot of money there is software and marketing automation software so you can add a weighting system to pages. You can say this one followed us on twitter and they visited three product and they are pretty close to making a sale. We want to nurture them a different way. That aside I would say the most important thing when you're measuring impact is to define what impact means. What questions do you want to answer three or measurement. Measure your measuring towards the right thing. If you want to know which channel is most effective

and you want to target limited resources that's a different question than which messaging leads to conversions and that's a different question than how do we increase sign-ups.

Just like the rest of your Omnichannel strategy think strategically about what you want to measure. What questions you want to answer and that will tell you to parse your data set that you had to get those answers.

Can you please elaborate about over personalization.

There some examples I did not include but if you start googling SCORE. You find a lot of examples from retail channels - - retailers that get a little [Indiscernible] with how their parsing your data and trying to pop up and be there for you all the time. When things get over targeted a concert to feel creepy. Companies have a massive amount of data and they need to use it responsibly. >> Some base covering thing is always having a way to opt out to make it clear you are using cookies and let them opt out of being tracked if they don't want to be tracked let them opt in if they do. Explain the benefits. Explain what they give up if they opt out but definitely make it a choice. Always this user experience principal help. I find common sense

is a good answer. Basically if you have to ask if you are sitting around the table with the marketing team and someone has to ask is this creepy? It's probably creepy. Still even after them having been around for a long time targeted ads that fall you people still get creeped out.

There's definitely a line between personalization and creepy. That will be different from each brand. It will be different for each customer. I would say air on the side of transparency and let them know why you're doing it give them away out if they don't participate and let them know the benefits of staying in proceeding for mentally don't invest a ton of time and in - - and resources into this feature that may out - - and up being super creepy. To get some real world feedback.

Let's take one last question. Any tools to help with data audits?

Sure. Your analytics are your biggest. Use your analytics package.

Google analytics is a great free tool for your website it can tell you so much if you're overwhelmed and overloaded with that data they have a bunch of great online courses that can tell you how to get the most . It can get into a lot of math but if you can get through that part I think you can get a lot out of it. Even if free analytics tool can be a immensely helpful and telling you what is consistent across those pages and what is the data telling you ? If you had a website you've had for a while even something as simple as a web crawler can be helpful. Just to tell you to tell you how many pages you had and are you using them well on a tactical level you TM tags that tell you where you came from and what they clicked on to get to you be consistent with those across devices and channels. Make sure consistency. Make sure the tagging is consistent and you can track journeys. You can keep your data clean so it's telling you a story. Internally make sure people communicate. If someone runs your social media account and that's a different person than a person reading analytics keep them in communication with each other because each will have data to share that can be valuable to the others. With that I will say thank you for having me.

Thank you so much as well. Those are all the questions we have time for today. Ladies and gentlemen on behalf of SCORE, I want to thank you all for attending today's webinar. In closing I want to give a very big thank you to Jordan for presenting today. We wish you all a wonderful day. Take care. Thank you for attending.

[ Event Concluded ]