Whitepaper

censhare

Getting Started with Omnichannel Marketing

A hands on guide to adopting today's most powerful marketing strategy

freedom
to create

Contents

Different Channel, Same Content – Reaching Customers in the Ways They Want

Multichannel marketing and omnichannel marketing may sound similar, but they are far from being the same thing.

While all companies contact customers using more than one channel, relatively few can use all channels in parallel to provide personalized, timely and consistent content that customers want.

Nor can many organizations meet customer expectations as they shift from one channel to another. For example, a customer may engage with a company by using the brand's app on a mobile phone while on the move. Then, when they are at home, they expect a consistent experience on their laptop computer connected to the brand's website. They also expect the same product images and information when using a partner's website or app. Only by delivering seamless, tailored experiences on the customer's preferred channel at the time of consumption can companies deliver the ultra convenience that people value.

What is Content?

Product information, service descriptions, photos, video clips, price lists, user guides, infographics, logos and articles – content comes in many forms and is one of the most important assets of any business. High quality content fuels marketing campaigns and drives, ultimately, sales. In fact, it could be said that publishing content is a complementary business for every organization.

Digitization is powering the customer experience. It's providing more content to make experiences relevant, enticing and informative for each customer.

Omnichannel Approaches Boost Customer Spend

The channel explosion is unprecedented. Marketing, sales, customer service and indeed entire organizations use a vast array of ways to interact with customers – print, web, mobile apps, social media channels, email, digital Point of Sale (POS) signage, ATMs and digital outdoor advertising.

Where multichannel marketing uses several of these routes separately to deliver content to customers, omnichannel marketing focuses on using whatever channels are appropriate to produce a personalized, harmonious customer experience. It puts customers first, regardless of which channel they prefer. Also, customers do not concern themselves about whether their choice of channel is useful for the brand – the brand must follow them if it wants their attention.

That creates greater customer satisfaction and significant commercial gains. According to Worldpay, omnichannel shoppers spend between 50 and 300% more than single channel shoppers.[1]

New Thinking Required to Break Out of Silos

Moving to omnichannel marketing calls for the adoption of highly integrated technology platforms. Separate processes for creating and managing content for specific channels are no longer feasible. Yet, many organizations are carrying such silo systems forward into today's world, strangling their ability to realize the full value of their content through omnichannel marketing.

These silo systems hold back organizations in many ways, mostly by wasting resources and increasing costs:

• Time is wasted, costs are added and sales can be lost when deploying content that is stored in silos (i.e., somewhere in the organization) across different channels, while the effort taken to produce and distribute channel specific variants reduces its value. Work can be duplicated, and legal requirements overlooked, leading to fines and damage to the organization's brand image.

• Inconsistent and poorly updated content can also cause the audience to lose trust in the content producer, whether a traditional publisher or a brand is interacting with consumers.

However, the shift from multichannel to omnichannel marketing takes more than just adopting a new marketing platform. As leading research firm Forrester states: "You can't just buy technology to prepare content for omnichannel delivery. First, it'll require rethinking how you commission content, how you structure outputs, and how you store it."[2]

1 *"The Store of the Future and the Role of Omni-Channel Payments in Driving Business Growth", 2015, Worldpay. https://www.worldpay.com/sites/default/files/WPUK-Omni-channel-payments-store-of-the-future.pdf*

2 *"Omnichannel Strategies Demand A New Content Approach", March 2018. Forrester Research*

From Here to There – A Process for Adopting Omnichannel Marketing

Omnichannel marketing is clearly an effective way to build lasting and close customer relationships, but as a report by Forrester Research[3] points out, few organizations are ready for it.

What's needed is a practical process that puts organizations on the right path to exploit this powerful integrated approach to reaching audiences with the right content.

In this whitepaper, we look more closely at how that process could work in practice.

Based on a Forrester report,[3] this diagram outlines an iterative approach to defining, deploying and refining an omnichannel management solution.

Getting Started

Moving to an omnichannel content strategy takes more than just installing the right content management platform and pressing 'go'. Inevitably the way that the organization works and the way that a platform runs will need to be adapted to each other. The adoption of such a platform is a compelling opportunity to review and improve how content management works for the organization.

Overall, it's a process with defined steps, the first of which is to review your current situation, as well as what success for your organization will look like.

You can then refine your requirements, followed by the development stage in which you firm up your content types and data structures. The deployment phase is followed by testing and review, which feeds back to help you further refine your requirements. Essentially it is an iterative process that constantly seeks to improve your omnichannel management so you can continue to serve customers better while improving your own efficiency and cutting costs.

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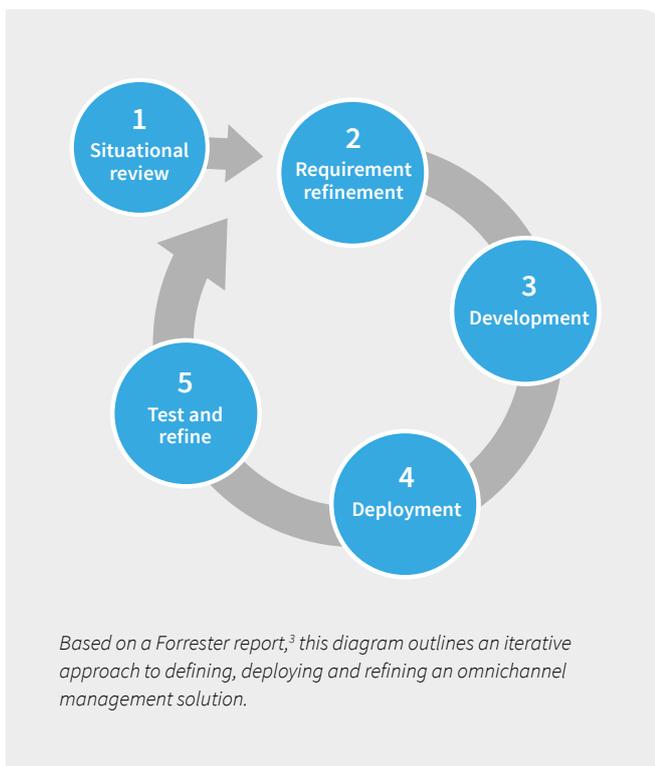
3 *"When And How To Start The Shift To Omnichannel Content", August 2018. Forrester Research*

Step 1: Review Your Situation

Get Stakeholders on Board

An omnichannel marketing strategy will benefit the whole organization, not simply the project owners. Depending on the type of business, these will usually come from the marketing department, but may also come from other teams in the organization, for example the production department of a print publisher that wants to create and edit content just once and then use that content across different brands and distribution channels.

This means that the marketing team will need the participation, cooperation and, perhaps above all, the enthusiasm of the other teams and stakeholders who will need to provide access to the data they own and maintain.

Some will understandably be wary of the changes that the new strategy will introduce, in particular of losing control over the data and processes they used to exclusively own. These fears can be allayed through a meeting that explains the overall omnichannel marketing strategy and outlines the benefits for each function, as well as what they can contribute.

For example, the customer service team will need to provide access to any FAQs it has prepared. The benefits they will receive will include access to a single source for all marketing collateral and campaigns, including up to date product information and special promotions that they could offer. It may also help them to better understand enquiries from customers, who may refer to specific promotions they've seen.

The meeting should also involve stakeholders who usually have a loose connection to marketing, for example, the legal department to advise on disclaimers or specific restrictions for individual markets. Requests by the legal department to quickly and consistently amend the disclaimer on all material may lead many marketing teams to their limits even if the changes are "tiny" from the legal department's perspective.

It is also vital to get the IT team to support the project. While it may look as though implementing a new platform would involve substantial IT support, the IT function would ultimately benefit through the operation of fewer platforms and thus a reduction in IT queries from Marketing. They would also benefit through the introduction of greater automation capabilities and professional administrative tools offered by the right platform, freeing up IT resources.

It is also important to obtain a CxO level sponsor of the project to emphasize the importance of the strategy and its long term benefits for the organization.

Setting the Requirements

Once stakeholders have bought into the plan, each should list their requirements:

• **What does each stakeholder need from the solution?** Examples could include access to the latest collateral and respective campaigns, access to product images and descriptions for use in flyers

• **How would each stakeholder like to operate the solution?** Examples could include one web interface for all, customized web interfaces for each function, global access

• **Which data does each stakeholder need and from whom?** Examples could include product information from corporate Product Information Management (PIM), or high resolution image data from stock photo services

• **What's the value of using the solution for each stakeholder (and the entire business)?** Examples could include savings in agency costs due to central image storage, savings from eliminating the use of rights expired images.
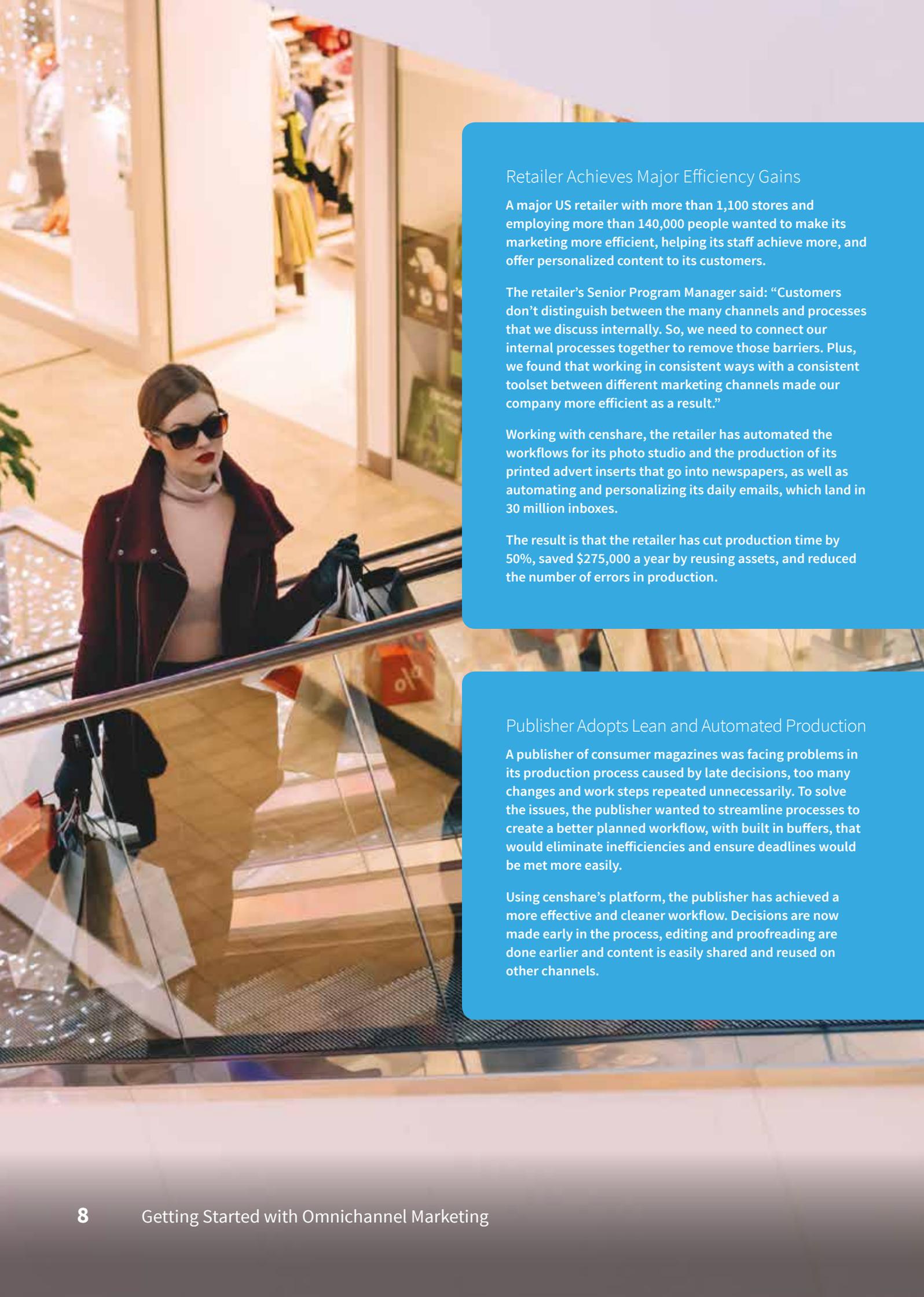
Retailer Achieves Major Efficiency Gains

A major US retailer with more than 1,100 stores and employing more than 140,000 people wanted to make its marketing more efficient, helping its staff achieve more, and offer personalized content to its customers.

The retailer's Senior Program Manager said: "Customers don't distinguish between the many channels and processes that we discuss internally. So, we need to connect our internal processes together to remove those barriers. Plus, we found that working in consistent ways with a consistent toolset between different marketing channels made our company more efficient as a result."

Working with censhare, the retailer has automated the workflows for its photo studio and the production of its printed advert inserts that go into newspapers, as well as automating and personalizing its daily emails, which land in 30 million inboxes.

The result is that the retailer has cut production time by 50%, saved $275,000 a year by reusing assets, and reduced the number of errors in production.

Publisher Adopts Lean and Automated Production

A publisher of consumer magazines was facing problems in its production process caused by late decisions, too many changes and work steps repeated unnecessarily. To solve the issues, the publisher wanted to streamline processes to create a better planned workflow, with built in buffers, that would eliminate inefficiencies and ensure deadlines would be met more easily.

Using censhare's platform, the publisher has achieved a more effective and cleaner workflow. Decisions are now made early in the process, editing and proofreading are done earlier and content is easily shared and reused on other channels.

Stakeholders should also prioritize these requirements into must haves, should haves and nice to haves, and adopt an evolutionary approach – what they would like to see happen on initial release, in year 2, and year 3.

However, it is also important to be realistic at this stage about what would be achieved in the initial deployment. Do not over promise, but rather ensure that all stakeholders understand that they are entering a process of continuous improvement that will deliver benefits at every stage. If expectations are set too high for the initial release, implementation time may be affected, and the project team (and, in fact, the entire business) will be disappointed with the project even before it is launched.

Define What Success Means to You

Stakeholders also need to provide numbers that will define whether or not the project has been a success on their terms. Examples from censhare's projects include clients such as the Swiss retailer Migros, one of whose criteria was the reduction of marketing related IT costs (Migros achieved a 70% reduction).

One of Jaguar Land Rover's criteria was increasing the speed of collateral production and it achieved an acceleration of nearly 70%. A travel company has seen a 90% reduction in its costs for using images protected by royalties.

Not all benefits will be financial though. Increased awareness of campaigns can reduce the duration of customer support calls by 5% or more. Customer satisfaction will improve, for example Net Promoter Score (NPS) gains can be substantial.

Estimate the Costs

An important stage is estimating the total cost of the solution. This will include elements such as the platform license, onboarding, hosting and maintenance, training for initial and new users and any upgrades as required. Don't forget to include the costs of promoting the tool to your own staff to create awareness and excitement across the organization.

Build Your Strategy Team

Each function in the organization (marketing, IT, sales, customer service etc.) must have a single point of contact tasked with communicating the project to each involved team, gathering requirements, and providing status updates.

Step 2: Refine Your Requirements

Build the Domain Model

The domain model defines who needs access to which information, data, and files. It takes the form of a tree, a hierarchy of nodes, starting from a root node. Each node can be freely named by the user to suit their organization's structure and operations, very much like a folder structure in an IT file system.

For example, a business publisher may have a central office in one location, the root node, with subsidiaries in other countries. These offices are in a lower domain. There might be a lower domain level under these for business areas such as reports or journals and another under this for different customers.

These domain nodes serve three main purposes:

• Assigning an asset to a domain node determines where its documents are stored within the system.

• User accounts and permissions are also associated with domains – a user can see only those assets belonging to one of the domain nodes assigned to that user. Everything else is invisible and inaccessible.

• The domain node assignments of assets can be used as search criteria, so domain trees might resemble the corporate structure, business segments, geographical distribution of subsidiaries or any other criteria, as in the example of the publisher above.

It's also a good idea to seek advice from the platform vendor to help with these definitions, as well as other essential tasks.

Map Your Customers' Journeys

An important consideration is how your customers discover your organization, find out more about your products and services, and what you need to provide to help them interact with you in a positive way that meets their needs and expectations.

For example, take your online store. Customers will visit to browse and purchase products and look for user guides, reviews and ratings and FAQs. For this, you will need to provide assets such as brand elements, product images and descriptions, PDF user guides, reviews and ratings, and FAQ documents.

On your YouTube channel, customers will watch brand videos, product promotions, and tutorials. Assets required here are brand elements, video clips and descriptions.

Channel	Potential Interaction	Required Assets/Information	Priority
Website	Looks for company brochure, thought leadership material for specific topics	Brand elements, downloadable assets	**A**
Online Store	Browses and purchases products, looks for user guide, reviews and ratings, and FAQs	Brand elements, product images and descriptions, user guides, reviews and ratings, FAQ documents	**A**
Owned Community Site	Shares product experience with other users, e.g. recipes for a community of retail shoppers	Brand elements, user profiles, user generated content, relations to matching products in the online store	**C**
Email Newsletter	Clicks on relevant promotions of thought leadership material, user community and products matching the user's interest profile	Brand and campaign elements, product images, newsletter copy, user profile (for segmentation)	**A**
Mobile App	Clicks on relevant promotions of products and thought leadership material, interacts directly with the user community, uses value added services	Brand elements, product images and descriptions, user guides, reviews and ratings, FAQs, promotional copy	**A**
In Store Display	Sees current promotion and seeks product in the store for hands on assessment	Brand elements, product images, descriptions	**B**
Print Catalog	Browses products and additional information, identifies ways to purchase	Brand elements, product images, descriptions, additional promotional copy	**A**
Direct Mail	Sees relevant promotions of thought leadership material and products matching the user's interest profile	Brand elements, product images, promotional copy, user profile (for segmentation)	**B**
Contact Center	Wants to place an order over the phone or by email, or has a question for customer care (e.g. technical issues or billing problems)	(FOR CUSTOMER CARE AGENT) Product descriptions, recent promotional campaigns, user profile, user guides, FAQs	**B**
YouTube Channel	Watches brand videos, product promotions and tutorials	Brand elements, video clips, descriptions	**B**
Partner Portal	(PARTNERS ONLY) Downloads corporate identity guidelines, brand elements, thought leadership material, sales presentations, product information	(PARTNERS ONLY) Brand elements, product images and descriptions, video clips, presentations, marketing and sales collateral, CI guide	**A**
Event	Sees promotional banners, looks for printed thought leadership material and product information	Brand elements, printed marketing and sales collateral	**B**

Table 1 – Examples of channels to customers and how an organization may identify assets and information required for each channel

Build a Prototype

Here you need to describe the requirements more fully by putting in detail to help you prove the concept and show how the solution would work in practice – how would someone find a piece of artwork? How would a call center agent get to the right campaigns?

Tasks for this stage are:

• Identify the data sources and content types
  – Which internal data do you need?
  – Which remote (external) data do you need?
  – What's needed to access these data sources?
• Identify the actual users and their roles
  – Who will use the system?
  – What roles will they perform?
  – Which access rights do they need?
• Describe the workflows
  – How will content be 'pushed' through its lifecycle, from planning and creation to execution and analysis?
  – Who needs to be informed about status changes?
  – Who (if anyone) needs to approve a step before moving to the next phase?
• Finalize the Key Performance Indicators (KPIs)
  – Which KPIs need to be tracked?
  – How shall these be displayed in your dashboard?

Step 3: Development

Create Content Types

Each data source needs to be assigned to a content type, either a newly created one or an existing type.

Decide How They Are Linked

For each digital asset, related assets need to be mapped and linked. For example, one asset might be a sales presentation. Related assets might be product brochures, product descriptions, product images and more.

Similarly, a product image could be linked to image variants, alternative images of the product, product description and price and a link to the product page in the online store. Remember that this linking is a powerful way to use content in new ways, especially if the chosen platform incorporates automated functionality to make these linkages.

Decide the Metadata You Want to See

For each content type, select which metadata should be displayed. For example, for a photograph, the metadata might include the usage rights for the photo, or the photographer who took it.

Consider whether the platform can apply automation and artificial intelligence to create additional metadata whenever possible. For example, if you use a huge image library of many thousands of images, some platforms can automatically recognize and describe the image content, the color spectrum, the mood and even the exact location where each image has been taken.

This data can then be added to the metadata, helping those users who look for images and variants. Not only can all images be tagged in this way, the tagging will be consistent across all images and image sources.

Set Up Workflows

Set up the workflows defined in Step 1.

Decide Responsibilities

Decide who looks after which data, who is responsible for administration of users and who is in charge of system administration.

It's a good idea to work with teams or departments to produce Service Level Agreements that are acceptable to everyone. When expectations of people's inputs are formalized, their importance to the process is emphasized.

Step 4: Deployment

Build Connections

The data sources identified earlier now need to be technically connected. This clearly involves the IT team, which needs to connect the data sources (or enable access, for example by configuring firewalls), but also regular users who contribute content – they may have to upload files using the system.

Provide Appropriate Training

The training each person requires will vary according to their role. Managers will have different training objectives to the staff who work for them, requiring training to be customized to meet exact needs.

Get the Reports You Need

The solution's dashboards should be adapted to show the information and reports relevant for each role.

Step 5: Test and Refine

Ask About Experiences

Once the solution is in operation, you can start to get feedback from the users about how it is performing and if it is meeting their needs:

- Talk to people individually to get their feedback

- You could do an anonymous online survey to get unbiased opinions

- Provide ways for people to feed back any problems and issues they have

- As well as problems, ask what benefits they have received and whether these could be increased in any way

Consider gaining first impressions through a beta test program that invites selected staff members to test the system before it is actually launched.

Review the Feedback

- Stakeholders should review the responses and decide how the system can be improved to overcome the most pressing issues

- Continue the process by going back to ask for more experiences and feedback

For major or fundamental changes affecting the organization, such as the acquisition of a new company, it may be beneficial to review the process from Step 1.

Swiss Insurer Gains Transparency, Speed and Efficiency

A Swiss insurance company with more than 4,000 employees wanted to manage media assets such as images, logos, and advertisements on a centralized system as well as making them available to a wide range of users including agencies and partner companies.

Adopting the censhare Digital Asset Management solution transformed the insurer's working processes, improved communication and the storage of data, and halted the uncontrolled growth of digital data. The agencies now create their own advertisements, brochures and advertising material using an intuitive web interface. This system is highly standardized but also customized to meet the requirements of each branch and agency.

The Head of Marketing Support summed up the major benefits of the solution: "The transparency and the structured processes were the key requirements for us and one of the main reasons for making this investment. The general agencies quickly obtain the printed material required which they can access interactively."

Selecting the Right Platform for Omnichannel Marketing

At some point in the process you will need to decide which technology platform will best suit your needs.

The platform will need to be implemented in order to support the Step 2 development stage, so it is important to find not just the most suitable technology but also a vendor that is able to provide expert support in the development work.

Key to obtaining the right platform is to create a well thought through Request for Proposals (RFP) document based on the requirements and outputs that you have defined.

censhare Universal Content Management

censhare Universal Content Management is a single platform that offers organizations a practical and cost effective route into omnichannel marketing. The platform solves the problems organizations typically experience with conventional digital asset and content management software, as well as product information management software.

It provides a streamlined platform for collaborative communications across the entire organization as well as an efficient system for managing all marketing processes involving content, tasks, and resources. It promotes the efficient coordination of marketing activities wherever and whenever they are.

censhare helps you achieve many benefits:

- Increase the consistency and quality of your campaigns
- Use resources efficiently and save time
- Achieve the full value of your content

- Take advantage of sales opportunities as soon as they arise
- Reduce costs and create more effective campaigns

The censhare Universal Content Management platform meets the needs of individual functions with a range of solutions:

- **Digital Asset Management** – Manages every type of digital content, such as images, videos, PDFs, graphics, media files, presentations, and more
- **Product Information Management** – Manages product data by linking all information objects to available sales and marketing material, and related information
- **Content Management** – Translates and transforms digital assets for specific uses and use on all digital channels, including corporate websites, regional sites, online shops, and mobile sites.

These three core solutions then enable further use cases that include:

- **Brand Management** – Manages and provides access to brand assets such as logos, pictures, templates, best practice examples, and brand guidelines
- **Print Production Management** – Enables auto–mated updating and production of printed items
- **Headless CMS** – Allows organizations to operate a 'Content as a Service' model so their assets can be used by external applications. This broadens its usefulness and value beyond website and direct customer communication.

Conclusion

Organizations have so far used multichannel marketing to deliver content to customers and get them to engage with their message.

By contrast, omnichannel marketing focuses on using whatever channels are appropriate to produce a harmonious customer experience. It puts the customer first, not each channel's needs.

Omnichannel marketing offers enormous benefits to the organization that can adopt it successfully – cutting costs, reducing time wasted, improving efficiency, and making it easier to get the right content to the right customers at the right time.

To do this, organizations are advised to follow a process, defining their requirement to ensure the building of a system based on a capable, flexible platform and is developed and improved to suit the changing needs of users and stakeholders.

censhare offers a platform and relevant business services that can help achieve the many benefits of omnichannel marketing and can help organizations take it into their operations as a natural part of the way they work and go about their business.

about censhare

Our pioneering, universal content management platform lets you connect with your audiences on any channel, in any language, locally or globally. Clients like Allianz, Dyson, Christie's, Lufthansa and many more have already discovered new freedom to create and deliver consistent quality content with exceptional efficiency.

Contact us at **www.censhare.com**