

Omnichannel Marketing: A Complete Guide for 2024





Introduction

In 2024, the digital commerce landscape will be more competitive than ever. The recent pandemic accelerated the shift towards online shopping and highlighted the importance of a cross-channel customer experience. Consumers now expect businesses to offer a variety of channels for shopping and support - both online and offline – and they want these channels to work together seamlessly.

Businesses that can meet these expectations are likely to thrive, while those that can’t risk losing customers to competitors who can offer a more integrated shopping experience. Add in the immense capabilities of **AI-powered personalization** and the stage is set to revolutionize personalization in digital marketing.

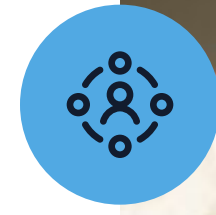
Twilio’s 2023 State of Customer Engagement report found that customer engagement leaders, working hard to develop and execute omnichannel customer engagement, are seeing the biggest results from their investments in digital customer engagement, including **increased revenue by an average of 123%**, with 27% stating that the **investments tripled revenue**.

Table of Contents

What is omnichannel?	4
Why are omnichannel customer journeys important?	5
How to pull off omnichannel engagement	8
How top brands are building omnichannel experiences	12
Getting started with omnichannel engagement	18
About Twilio Engage	19
About Twilio Segment	20
Recommended Reading	21

However, companies still face the dual challenge of optimizing technology to align with budget constraints and achieving key business objectives. Obstacles such as departmental silos and outdated software persist to this day. Despite these challenges, the omnichannel approach has never been more ripe with opportunity.

In this guide, we'll break down what omnichannel engagement means, share why omnichannel journeys are important, and show how other companies have used it to make their customers happy. Whether your business is new to omnichannel or aiming to grow an existing strategy, we'll provide all the essentials for you to reap the benefits.



What is omnichannel?

“Omnichannel” is often used interchangeably with the term “multichannel,” which is misleading. In fact, many companies say they offer omnichannel communications, when in actuality they’re using a multichannel approach.

The key distinction between these two strategies is whether or not customers can switch seamlessly between channels (which is the hallmark of omnichannel engagement).

A great example of this is customer support. Say an individual reaches out to your business first via **chat**, before rolling into a **video** co-browse session or **voice call** with your agent. With an omnichannel strategy, that representative should be able to see the previous chat conversation to understand the issue at hand, rather than coming in cold and asking the customer to repeat themselves.

With a multichannel approach, a representative wouldn’t have access to information about that customer’s history on different channels, limiting the level of service they can provide.

For quick reference, here are our definitions of omnichannel vs. multichannel:



Omnichannel

An **omnichannel approach** is when every channel a business operates on is connected to provide continuity and a personalized customer experience.



Multichannel

A **multichannel approach** is when a business operates on multiple channels, but doesn’t have the consolidated data to understand customers’ complete, cross-channel journey.

Chapter 02

Why are **omnichannel customer journeys** important?





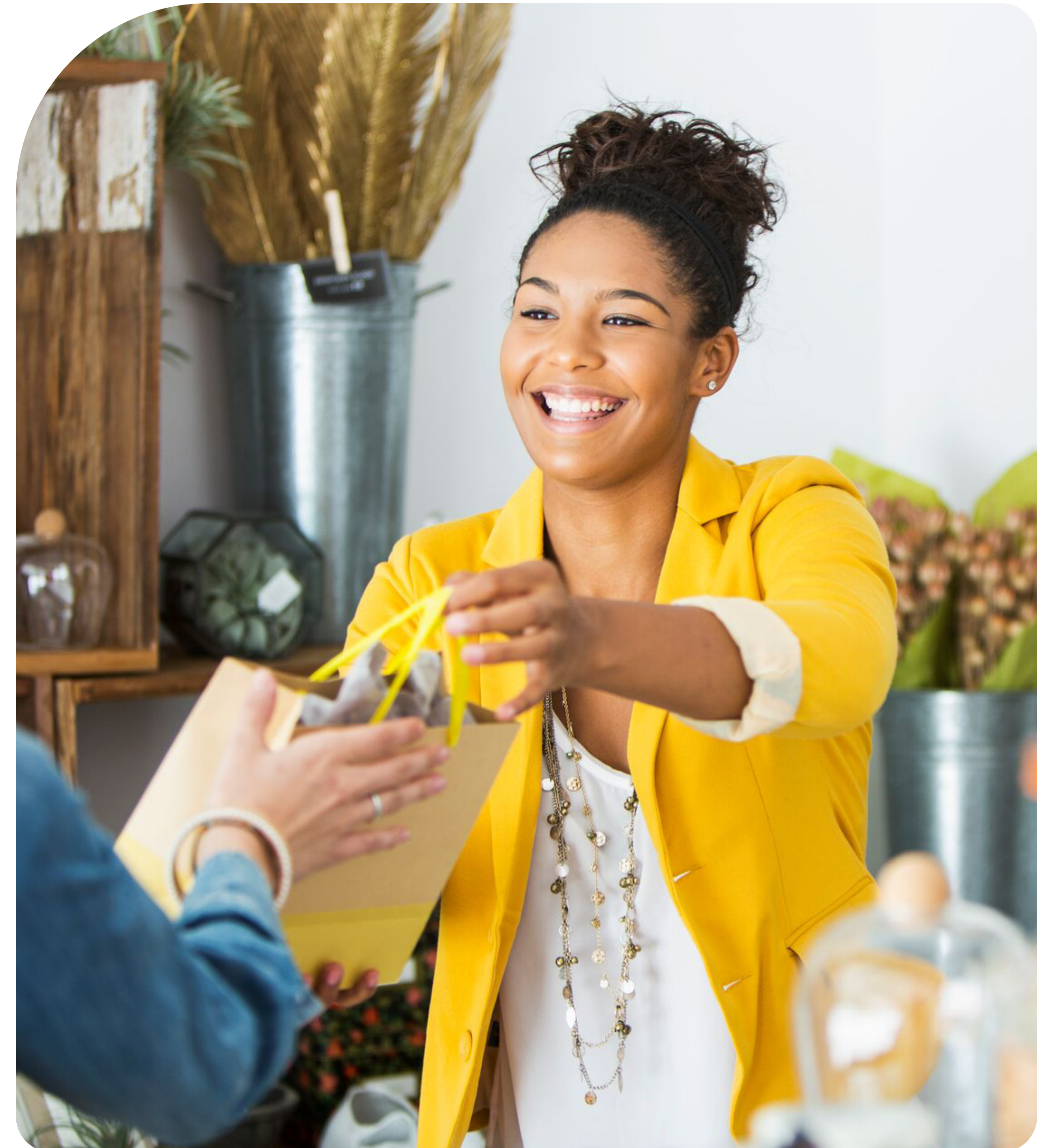
Omnichannel has become the gold standard of customer experience across industries, but meeting customers on their preferred channels is only half the battle. Businesses must also build experiences that engage and convert its customers on each and every channel they interact with.

Unfortunately, that's easy to say, but hard to do – which is why we're experiencing a “customer expectation gap.” This gap is the growing disconnect between the seamless, personalized experience customers crave and the actual experiences businesses create. In fact, Twilio's **State of Customer Engagement Report** found that while 75% of companies think they're providing good personalized experiences, 48% of consumers disagree. Clearly, there's room for opportunity and improvement.

If businesses can successfully build engaging and personalized omnichannel experiences for their users, they can:

- Drive loyalty,
- Boost sales and conversions,
- And increase customer LTV.

In fact, **83% of consumers** say a personalized experience increases brand loyalty, while nearly two-thirds of consumers say they'll stop doing business with a company if it doesn't personalize their experience. Plus, companies that use personalization report that it influences a 46% average increase in user spending. Clearly, there's a business case for effective omnichannel experiences.





Omnichannel in practice

With a centralized view of customer behavior, businesses can go beyond surface-level personalization tactics (like using a customer's **first name in an email**) to meaningfully engage customers.

Take Walgreens, which heavily focuses on creating seamless, cross-channel experiences for their customers. They've simplified their **prescription refill process** to make it as easy as possible, no matter the channel. Using the Walgreens mobile app, a customer can scan the barcode on their medicine bottle and automatically generate the refill for pickup at their local store. A customer could also order a refill by replying to a Walgreens reminder email, or simply calling up the pharmacy.

An omnichannel strategy ensures that a customer can take the next step in a customer journey without encountering friction (no matter the channel they use). It's an approach that benefits businesses as much as consumers: Walgreens found that omnichannel customers **spend 3.5-6x more** than those who shop in-store only.

So, how can *your* business get omnichannel right?

Chapter 03

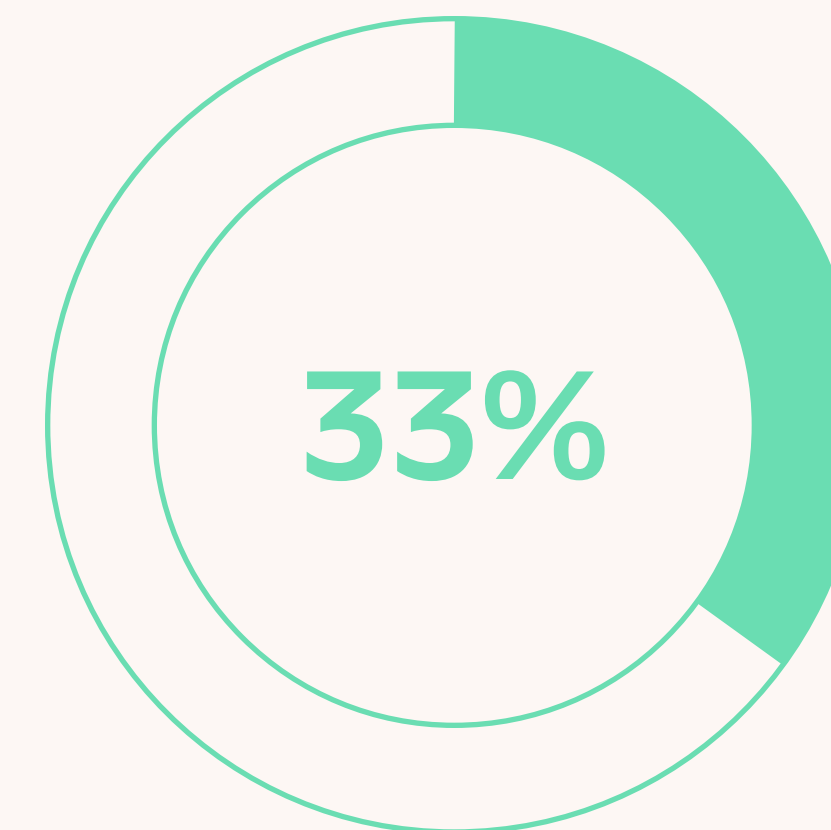
How to pull off **omnichannel engagement**



First and foremost, to pull off omnichannel customer engagement, businesses need to have the right infrastructure. Teams across the organization should have access to a **centralized data hub** that offers a single source of truth on customers' behavior and history across channels.

It might seem obvious to say, but an integrated customer experience begins with an integrated tech stack that includes AI capabilities. Gartner predicts that by 2025, organizations that implement AI in the martech stack will **shift 75% of their staff's operations** from production to more strategic activities that can lead to increased customer lifetime value.

When evaluating a tech stack there are a few key components to consider. The first is accessibility. The goal is for this consolidated customer data to be actionable. Having an intuitive user interface that allows teams to view, share, and act on insights is essential. This includes the ability to create cohorts of users based on event behavior or specific traits (like pages viewed, purchase frequency, and so on).



Martech utilization has **plummeted to 33%**, creating risk and drawing CMOs into a choice of how to respond. CMOs must balance AI pursuits with the need to maximize returns on existing investments.

Source: Gartner's 2023 Marketing Technology Survey

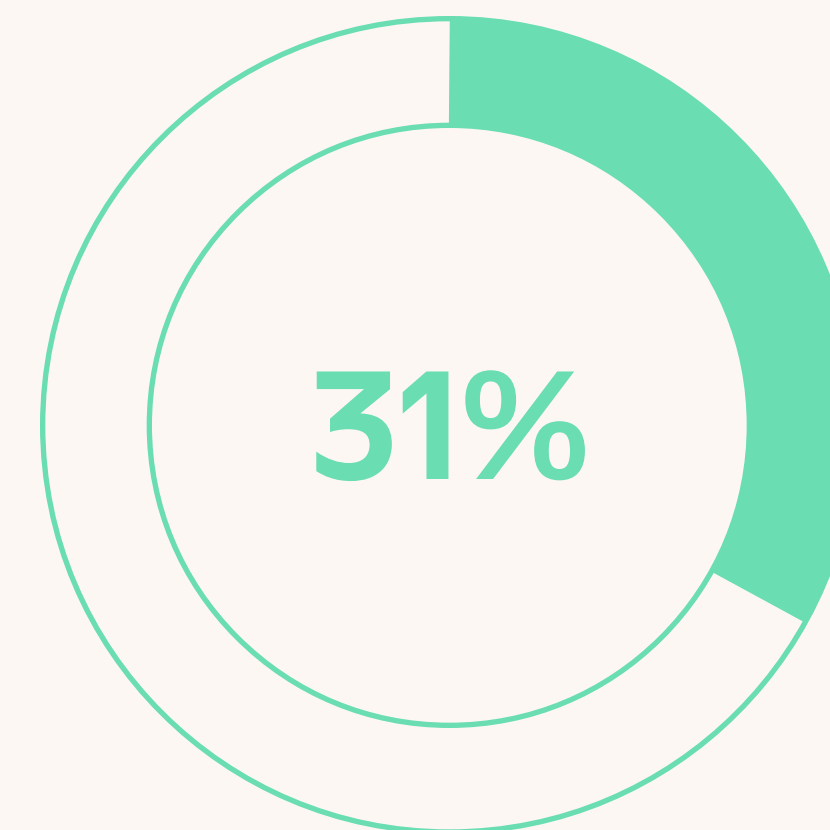


The second point to keep in mind is scalability. Customer channels are constantly emerging and evolving, and businesses are continuing to add more tools and apps into their workflows to manage these interactions. Being able to seamlessly integrate new data streams is crucial to keep momentum, and maintain a 360-degree view of the customer.

Another cornerstone of scalability? Automation. Using real-time data to trigger relevant messaging ensures that businesses never miss a window of opportunity to engage customers.

Here's a quick recap of what's needed for implementing omnichannel engagement:

1. A centralized data hub that consolidates customer data from any source in real time, and easily integrates with new applications and platforms.
2. The ability to **merge the complete history** of each customer into a single profile in real-time, no matter where they interact with your business.
3. The ability to **orchestrate various actions** across a set of customer engagement tools (like **Twilio Engage** which allows you to connect native email and SMS channels and 400+ out-of-the-box integrations) to deliver personalized communications **based on customer interactions** and preferences.



31% of businesses say the ability to “orchestrate new personalized journeys across multiple channels and touchpoints” is a top critical gap in aligning their marketing technology stack to organizational needs.

Source: Gartner's 2022 Marketing Technology Survey Insights



Not sure where to start with omnichannel?

Building an omnichannel communications strategy may seem intimidating, but it shouldn't be. Many businesses **start with email** – an easy, reliable way to reach and target customers. With Twilio SendGrid, you can seamlessly add new APIs as your company grows, allowing you to incrementally develop an omnichannel strategy, without sacrificing customer experience along the way.

Get started with Twilio SendGrid or **talk to a member of our team** to learn how email can scale with your business.



How top brands are building omnichannel experiences

Now that you're up to speed on all things omnichannel, you might be curious about what it looks like in practice.

To help, we've highlighted how four brands built omnichannel communication strategies to cater to their customers' unique needs.



04 How top brands are building omnichannel experiences

VERONICA BEARD

USE CASE

Data powered performance marketing

INDUSTRY

Retail

HEADQUARTERS

New York, New York

REGION

NAMER

PRODUCTS

Connection, Journeys, Twilio Engage

How Veronica Beard built omnichannel experiences and decreased customer acquisition costs by 20%

Like many companies during the pandemic, luxury retailer **Veronica Beard** found themselves in need of a platform that could support both online and offline communication, as well as tie together data across its many customer touchpoints.

The company used Twilio Segment to integrate and unify its technology stack, and leveraged **Twilio Engage** to build sophisticated audience segments for its marketing campaigns that personalize the customer experience.

Here are just a few examples of how Veronica Beard is using first-party data to create better marketing campaigns and thus, better omnichannel experiences for its customers:

Social Media Advertising	Emails	Customer Service
With valuable first-party data, Veronica Beard elevated its paid social channel from being one of the most markdown-heavy channels to one of the most full price-heavy channels, all while scaling advertising budgets.	Using online form software, the company enriches customer profiles with respondents' preferences and likelihood to purchase. They then use this data to trigger personalized emails based on a user's response.	If customers need help, they can contact customer service via live chat, email, phone, SMS, and more. The rep can then quickly pull up and reference all of the user's previous interactions with the brand to better serve them.

Using Twilio Segment, Veronica Beard delivers customer-first experiences based on real-time interactions across touchpoints, all while driving better marketing efficiency.





Sanofi builds omnichannel engagement to improve patient outcomes

Global healthcare company **Sanofi** helps healthcare providers (HCPs) discover and learn about new medications so they can give the best possible care to their patients. Unfortunately, generic “Hello Doctor...” emails weren’t helping the company effectively achieve its mission and goals and leverage the wealth of data it had on its customers. That’s what pushed Sanofi to partner with Twilio Segment to put their data to work and start delivering more personalized, omnichannel experiences for HCPs.

Now, by building customer profiles using data points (like prescriptions written, webinars attended, and sales interactions), Sanofi can send customers more complex, targeted messages based on their previous interactions with the brand, as well as their interests and needs, including:

E-Commerce Website	Emails	In-Field Reps
Using real-time audiences and messaging, Sanofi delivers personalized on-site communications based on previous online and offline user interactions.	The company now sends targeted messages to HCPs based on previous interactions, interests, and needs.	In the future, in-field Sanofi sales reps will be able to use this customer knowledge to deliver timely treatment information to busy HCPs, resulting in more rewarding in-person interactions.

Now, the Sanofi team can easily compile user data all in one place so they can easily utilize and activate personalized campaigns that drive conversions – bringing the company one step closer to achieving its mission of helping individuals serve healthier, fuller lives.

USE CASE	Data enabled sales and support teams, Data powered performance marketing, Customer insights and analytics, Customer 360
INDUSTRY	Healthcare
HEADQUARTERS	Paris, France
REGION	EMEA, APAC, NAMER
PRODUCTS	Twilio Engage, Protocols, Connections, Profiles Sync



USE CASE	Alerts and notifications, Verifications and onboarding, Marketing and promotions
INDUSTRY	On-demand services, Retail and ecommerce, Transportation and logistics
HEADQUARTERS	London
REGION	Global
PRODUCTS	Messaging, Verify, Voice, WhatsApp Business API

Delivering on the omnichannel promise with Deliveroo

Deliveroo is a London-based food delivery website and app, connecting users with delicious food from nearby restaurants in just 30 minutes or less. By partnering with Twilio, the Deliveroo team has created a true omnichannel experience for their customers, allowing them to choose exactly where they want to receive updates on their latest order.

Here are the ways they help turn hangry users into happy customers:

In-App Messaging	SMS	Voice	WhatsApp & Facebook Messenger
For orders placed via mobile app, Deliveroo can send mobile push notifications to easily update users when their order has been confirmed, picked up, and delivered.	Deliveroo also texts its users to share order notifications, marketing messages, and customer service updates.	Trouble with drop-off? Customers can call their driver via a masked number, allowing them to communicate in real time without compromising their privacy.	Users who place orders through the company's website can opt-in to receive order notifications via WhatsApp or Facebook Messenger.

Using Twilio, Deliveroo can create a flexible, convenient, and consistent experience across all customer touchpoints, ensuring its app is top of mind the next time users need to order food.



“We want customers to be in channels that work for them and not to force them down certain channels. Some prefer Facebook Messenger, others ring us and some customers contact us on social channels. One of the advantages of Twilio is it makes it easier to scale and bring these channels into existing workflows.”

Aimee Ruddy

Product Manager, Deliveroo



USE CASE	Data powered performance marketing, Data powered digital customer experiences
INDUSTRY	Travel, Real Estate
HEADQUARTERS	Portland, Oregon
REGION	NAMER
PRODUCTS	Connections

How Vacasa strengthened omnichannel engagement

Vacation rental management platform **Vacasa** started using Twilio Engage to visualize the entire customer journey and more effectively deliver personalized messages to guests across channels – removing friction from their vacation experience. With Twilio Engage, Vacasa could consolidate customer data across channels to gain a holistic, real-time view of both guests and homeowners. From there, the team could tailor its messaging across its website, app, email, and SMS alerts based on user behavior.

Here’s how Vacasa created an intelligent multichannel welcome sequence to remove friction from the guest check-in process:

Email	SMS	App
The morning guests arrive, they receive a check-in email with smart lock entry codes.	Just ahead of check-in time, Vacasa pulls from its customer data warehouse to trigger a corresponding text message with the entry code, saving guests from the hassle of scrolling through their inbox to retrieve it.	Vacasa uses Twilio’s Programmable Messaging API to send timely promotional messages. Prior to the reservations, the vacation rental company prompts guests over SMS to download the app, granting easy access to features like one-tap wifi-access and issue reporting.

Using these omnichannel tactics, Vacasa guests are seamlessly welcomed into their vacation stays (on the channel they prefer) with key check-in information right at their fingertips.

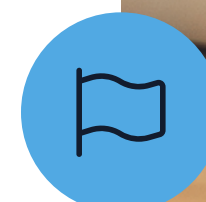


Getting started with omnichannel engagement

Getting started with omnichannel engagement (or even scaling a strategy) requires the right combination of data, infrastructure, and communication APIs to reach customers across an array of channels.

Using **Twilio Engage**, your business can deploy **email**, **SMS**, **video**, **chat**, **voice**, and more from a single platform, to build and scale data-driven, personalized customer experiences that grow lifetime value. Put simply, Twilio Engage combines the power of a native customer data platform and native omnichannel together in one solution to help companies drive efficient growth, delivering AI-powered customer engagement built on trusted data.

Schedule a demo today to learn how to uplevel your omnichannel strategy with Twilio Engage.





About Twilio Engage

Deepen customer relationships and efficiently grow your business by personalizing customer interactions on every channel from a unified, data-first offering. Twilio Engage uniquely puts the power of a native customer data platform (CDP) and native omnichannel together in one marketing solution.

Engage in real time – anywhere, anytime

Activate highly personalized experiences with real-time customer data and go from idea to campaign in minutes.

Build a complete view of your customer

Build profiles and audiences without SQL expertise, with real-time customer interactions collected in a privacy-first way across digital touchpoints.

Orchestrate journeys where your data is

Deliver personalized experiences where, when, and how your customers want with our native email and SMS channels, custom channels, and 450+ out-of-the-box integrations.



About Twilio Segment

As consumer sentiment, industry trends, and regulatory enforcement all push companies away from depending on third-party data, the need for an alternative source of customer data can't be understated. First-party data is the solution, bringing a competitive advantage as it fills the gaps where third-party data falls short: accuracy, relevance, and building customer trust.

To adopt a first-party data strategy, companies look to the CDP, a centralized tool that helps modern businesses collect, govern, synthesize, and activate customer data. Twilio Segment is the leading CDP with more than **450 pre-built integrations** to different data sources and destinations.

Twilio Segment provides a complete solution that eliminates the need for manual data cleansing, complex data engineering processes, and analytics reporting functions. By automating all of the backend customer data operations, Twilio Segment helps companies get the most out of their first-party data.

You can see Twilio Segment in action yourself when you [schedule a demo](#).

Recommended Reading



The Real-Time Data Advantage: Perfecting the Art of Customer Engagement

Explore the realm of real-time, personalized communications and unlock the keys to building resonant relationships that foster customer loyalty and retention.

[Download guide>](#)



Perfecting Customer Data: The CDP Playbook for Marketing Teams

Learn how a customer data platform offers a unified customer view and simplifies connections for impactful insights on audience performance, resonating messaging strategies, and optimized marketing budget allocation.

[Download guide>](#)



The Growth Report 2023: AI Edition

Twilio Segment's third annual Growth Report is a yearly exploration of the tools, technology, and techniques businesses are using to grow in 2023. It should surprise no one that one trend came through in our survey loud and clear – the rise of AI.

[Download report>](#)



Today's leading companies trust Twilio's Customer Engagement Platform (CEP) to build direct, personalized relationships with their customers everywhere in the world. Twilio enables companies to use their communications and data to add intelligence and security to every step of the customer journey, from sales to marketing to growth, customer service and many more engagement use cases in a flexible, programmatic way. Across 180 countries, millions of developers and hundreds of thousands of businesses use Twilio to create magical experiences for their customers.

For more information about Twilio (NYSE: TWLO), visit: www.twilio.com.

All rights reserved. Copyright @ 2024 Twilio Inc.