



HOW TO BUILD AN OMNI-CHANNEL STRATEGY

EXECUTIVE SUMMARY

Organizations develop and maintain dozens or even hundreds of proprietary and vendor-based applications, that serve both customers and employees. By building a long-term and sustainable omni-channel strategy organizations must set the necessary foundation to provide access to their applications via all currently available channels. They should however also take into consideration how the market will evolve; this includes paying attention to easy onboarding of new channels and devices yet to come; technical flexibility that will allow them to react quickly to user-experience trends and requirements and finally and perhaps most importantly, maintaining a unified user-experience across channels and applications.

Maintaining a large number of applications from multiple vendors, along with proprietary applications, sets a real challenge for many organizations seeking to develop a comprehensive and sustainable omni-channel strategy. Ongoing development cycles and never-ending upgrade cycles leave even the newest deployed solutions outdated and out-of-reach. In such an environment a successful implementation of an omni-channel plan can only be achieved following a well-defined strategy, a robust architecture, and clear priorities. While not everything can be implemented at once, there should be a clear path that leads to a satisfactory implementation of the strategy.

Creating a separate presence for each channel and device will damage an organization in the short and in the long term, leaving it with no means to react in real-time to market changes. When choosing an “omni channel” strategy, as opposed to a “multi channel” strategy, an organization is devoted to building a long-term and sustainable omni-channel presence, that can react to current and future trends quickly and efficiently, by utilizing technologies, methods, and gained experience from all channels and devices.

SUPPORTED CHANNELS

One part of building an omni channel strategy will be to decide on the channels that the company will support in the short and long-term. While it is recommended to include as many channels and devices as possible under your omni-channel-strategy-umbrella, an organization should take into consideration business needs, technical limitations and most importantly the actual usage by the users by employing an analytics tool.

Recommended list of channels

Type	Native	Web	Devices
Desktop	Not mature	Must	Windows, Mac, Linux
Laptop ¹	Not mature	Possible	Windows, Mac, Linux
Smartphone	Must	Must	iOS, Android
Tablet ²	Must	Must	iOS, Android
SmartTV	Not mature	Not mature	iTV, Android TV, various
SmartWatch	Possible	NA	iWatch, Android Wear

Notes:

1. Supporting laptop is done by providing an optimized solution for laptop screen-sizes (which is different than the general desktop solution). Not supporting laptops means simply providing the same layout as the original desktop solution.
2. Tablet usage is about 10% of the general mobile usage. As such it is recommended to fully support this channel

SUPPORTING NEW CHANNELS

The device market is extremely dynamic. Leading vendors such as Apple and Google release major versions of their software and devices annually. Other vendors are constantly trying to disrupt the market by releasing their own devices and software. To ensure an organization is able to keep up with the trends, it must embrace an agile approach. Supporting a new channel does not necessarily mean replacing an existing one, but rather represents an additional way for users to engage the organization and therefore another layer and need.

It is *recommended* to support a new channel once it reached 5% usage; When it crosses the 10% mark the organization *must* support the new channel.

Supporting a new channel usually takes between 6-12 months; preferably less (3 months is optimal). If it takes longer than this, it means that the organization's customers are left without a solution for a long period of time, and that when deployed the channel will already be outdated and in some cases even irrelevant. Quick time to market will ensure the solution is on trend, and will help to position the organization as a market leader.

UP-TO-DATE USER EXPERIENCE

User experience expectations change over time for various reasons; trends, hardware modifications, new operating-system versions, and business-driven changes. UI and UX trends change very often - think of how much our navigation UI changed over the years on various devices. New, stronger and faster hardware enables a more sophisticated user experience that was not possible in the past - a good example for that is the high CPU consuming animations and transitions. A new hardware feature can create a new user experience, that is actually responding to a business-need; a good recent example is Apple's TouchID which has become extremely popular as a mechanism for user verification, replacing passwords and PINs (and increasing app's usage). A new operating system

version can introduce new user experience standard, as happened with Google metro design and Apple's flat design. A company's rebranding process is a good example for a business change that requires a new user experience across applications and channels.

To make sure your applications are up-to-date with current trends it is recommended to run a cross channel - cross application facelift once a year, and to support new hardware and software features three months after they emerge in the market.

UNIFIED USER EXPERIENCE

Providing a unified user experience across channels and applications strengthens the organization's brand, and improves new channel onboarding and adoption rates as well as client satisfaction. While it is clear that it is extremely complicated and in many cases impossible to provide the exact same user experience across all applications it is a highly recommended keep shared elements consistent across all UIs. For example, logo, header, footer, navigation or a color palette. However, there are organizations that have a large number of applications and cannot provide a consistent experience across all. In this case it is recommended to group applications by users served and provide consistent UI and UX to the group. Some features are channel specific, and can only be implemented across

specific applications; for example, Apple's TouchID login should be implemented for all iOS mobile apps.

Element/Feature	Different Channels of the same application	Same channel of different Applications	Notes
Logo	Must	Must	Strengthen branding
Header	Possible	Must	
Footer	Possible	Must	
Navigation	Must	Must	Familiar navigation is a key success factor for easy onboarding
Color palette	Must	Must	Strengthen branding
Native features		Must	i.e. click to call on all smartphones applications
Single sign on ¹	N/A	Nice to have	Improve usability, currently too hard to implement for all
Single native container	N/A	Possible	Prevents the need to download more than one app
Widgets		Nice to have	i.e. use same image gallery on all applications

Notes:

1. All the channels of the same application must use the same user and password

IMPLEMENTING AN OMNI-CHANNEL STRATEGY

As mentioned earlier, the first decisions to be made when building an omni-channel strategy relate to the type of channels that will eventually be supported by the organization. While there is a general recommendation to support as many as possible, this may vary from case to case and from industry to industry. For example, mobile-web is crucial for the success of insurance company and retailers, as most of their users are search traffic driven and use their services only once in a while; banks on the contrary, must provide their users with a native app as their users are repeat customers that need on-going access to the services.

The second decision each organization should make and *strictly follow* is the maximum time allowed between each UI/UX face-lift, in order to make sure they are kept current. This must not be decided on a per-application basis, but rather as a broader strategy for the organization.

The third decision should address the level of unified user experience an organization would like to eventually provide across channels and applications. This decision might seem as the most complicated one since a full and immediate implementation would require an enormous effort to implement, however, this should be considered a guideline, and be implemented gradually as the organization updates and upgrades its applications.

DECISION MAKING MATRIX

Map existing assets

To be able to plan properly, the organization will need to prepare a list of all existing and planned applications. In parallel, a list of channels and devices already supported will be included. See example below*;

Name	Priority	Desktop web	Smartphone web	Smartphone Native	Tablet web	Tablet native
Cash management		V	V			
Bill payments		V		V		
Money transfer		V			V	

*for this example we decided to include all the *Must* channels and to update/refresh our applications once a year.

Prioritizing tasks

The second phase of building our plan will be to prioritize the applications. Add a column for *priority*, scaled from 1 to 10, where 1 is the least important application and 10 is the most important. The rank itself can depend on various parameters such as number of users, the business impact of the app, etc.

According to the priority, the gaps, and the overall plan, put a target date for each missing channel and refresh plan;

Name	Priority	Desktop web	Smartphone web	Smartphone Native	Tablet web	Tablet native
Cash management	10	Refresh Q3 2017	Refresh Q3 2017	Deploy Q4 2017	Deploy Q3 2017	Deploy Q4 2017
Bill payments	5	Refresh Q1 2018	Deploy Q1 2018	Refresh Q1 2018	Deploy Q1 2018	Deploy Q1 2018
Money transfer	5	Refresh Q3 2018	Deploy Q3 2018	Deploy Q4 2018	Refresh Q3 2018	Deploy Q4 2018

Choosing the right architecture (platforms/tools)

Once an organization has decided upon the applications it is targeting and sets the relevant time-frame for them it should layout the right architecture to will support its strategy and find the right solution(s) to build the architecture. While there is no real “one-size fits all solution” in this case, the organization must verify that the selected solution(s):

1. support all currently available channels
2. will provide an easy onboarding for new channels that will become available
3. will provide the relevant means to keep the user-experience current
4. will provide a unified user-experience across channels and applications.

A good architecture must be able to separate the presentation layer (also known as the “front-end” layer) from the backend layer. By having this separation, the

implementation of new channels, and front-end face-lifts of existing channels will be simpler and not require long, expensive upgrade cycles of the application's backend.

The right architecture must have the capacity to add new components to fill specific unified user experience needs, such as single-sign-on server, native container, and widgets package.

CONCLUSION

Creating and implementing a holistic and sustainable omni-channel strategy is a crucial part of every organization's ability to react better and in real time to market trends. By avoiding such planning, organizations are truly risking damaging not only their brand but also their ability to react to market changes over time.

Following the steps outlined above will enable large and medium organizations to develop a sustainable and non-compromising mobile presence, that can be easily modified and adapted to their business as well as to their clients.

A good, pre-planned strategy will assure the organization's market leadership, and will enable it to focus on developing its business and reach its goals.

ABOUT ZUZNOW

Zuznow delivers the only Frontend-as-a-Service (FaaS) platform to automatically create and maintain web and native apps, for smartphones, tablets, desktops and laptops. The company helps enterprises accelerate and rapidly deploy omni-channel development projects, improve user engagement and adoption by 300%, reduce time-to-market by 90%, increase KPIs, while keeping pace with the latest technologies. The Zuznow platform enables organizations to support bi-modal development processes and achieve business goals.

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www.zuznow.com



info@zuznow.com



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