Selling and the Omni-Channel Experience

Introduction

Operators are moving towards offering truly digital services to customers who are interested in more than just voice and data services. However, a significant proportion of those services are not native to the operator. The following are some important considerations for communications service providers that are getting more involved in the domain of sales and order entry:

> Sell everything from a range of simple product bundles to sophisticated offers.

> Engage in cross-channel sales with sales and order handover.

> The sales and order process needs to be simple, fast and accurate, and should not be weighed down by the complexity of the product offering.

The Customer Journey

A typical customer journey is likely to be comprised of the following steps:

> An existing customer, Stacy, receives an SMS from her service provider with a promotion/offer.

> Stacy responds to the campaign by clicking on the embedded URL, where she gets more information about the promotion via the CSP portal. She then browses the new promotion as a registered user desiring more details, Stacy connects with the call center. The agent already knows about her previous interaction (recorded under her profile) and provides the information she requests.

> After the agent gives her the offer's details, Stacy hangs up and sees on her screen that she can get a discount by subscribing to the promotion via the online self-care portal.

> Stacy logs into the self-care portal again using her account information and adds the promotion to her existing subscription.

> She receives an SMS that the new service activation is complete. During this seemingly simple journey, the following activities occur:

  – Interaction Management
  – Offer Enquiry
  – Order Capture

While this has been a single journey for Stacy, she has actually done a lot of channel-hopping to get the best price. She also expects activation to occur in the shortest possible time.

Activities that have taken place in the process of her journey have been triggered from multiple channels and they need to be recorded in a central location. This enables seamless handover across any necessary channels and it provides Stacy with a uniform experience throughout the process.

Delving deeper into what makes this process possible reveals the functional capabilities that are employed when providing an omni-channel experience during the selling process:

1. Customer Data Management (including Identity)

The customer's identity means different things to different components of the IT ecosystem. However, from a selling perspective, the customer's data and identity should be made equally available to all channels on-demand and with the appropriate depth of information.

This also involves integration from the central data store to northbound channels, as well as southbound OSS/BSS systems, to fetch contextual data based on customer interactions in these channels.

Instead of storing the customer data in channels, which results in data duplication and makes the customer data unmanageable, an operator striving to provide an omni-channel experience should have a central customer management system with contextual integration to their OSS/BSS systems.

2. Sales Offering Management

Similar to customer data, it is imperative not to distribute sales offers across channels – even if the offers are channel-specific. A true omni-channel experience should provide channel-specific offers and promotions. Because the customer may wish to move from one channel to another during the selling process, it also makes sense to centralize these offers and promotions in a centralized catalog, and model channel-specific rules in the same catalog.

Offers and promotions with channel-specific rules should be made available on-demand to channels that take into account the context of the sales process. For example, a new customer acquisition and creation of a shopping cart for that customer happens via a self-care portal. Further configuration of that shopping cart happens via the call center.

This would prevent a whole gamut of operational issues such as product data synchronization, order error handling and more.

3. Quotation and Order Entry

Some offers and promotions require agile and simple ordering processes. While others require complex processes in the quote and order entry phase. Traditionally, these were provided by different order handling systems based on offers, channels, customer types, etc.

In an omni-channel architecture, common ground is provided by a centralized quotation and order entry platform that can be configured to handle all offers with varying degrees of complexity.

Looking at the above criteria, we can derive an omni-channel architecture in the domain of sales and order capture illustrated below.
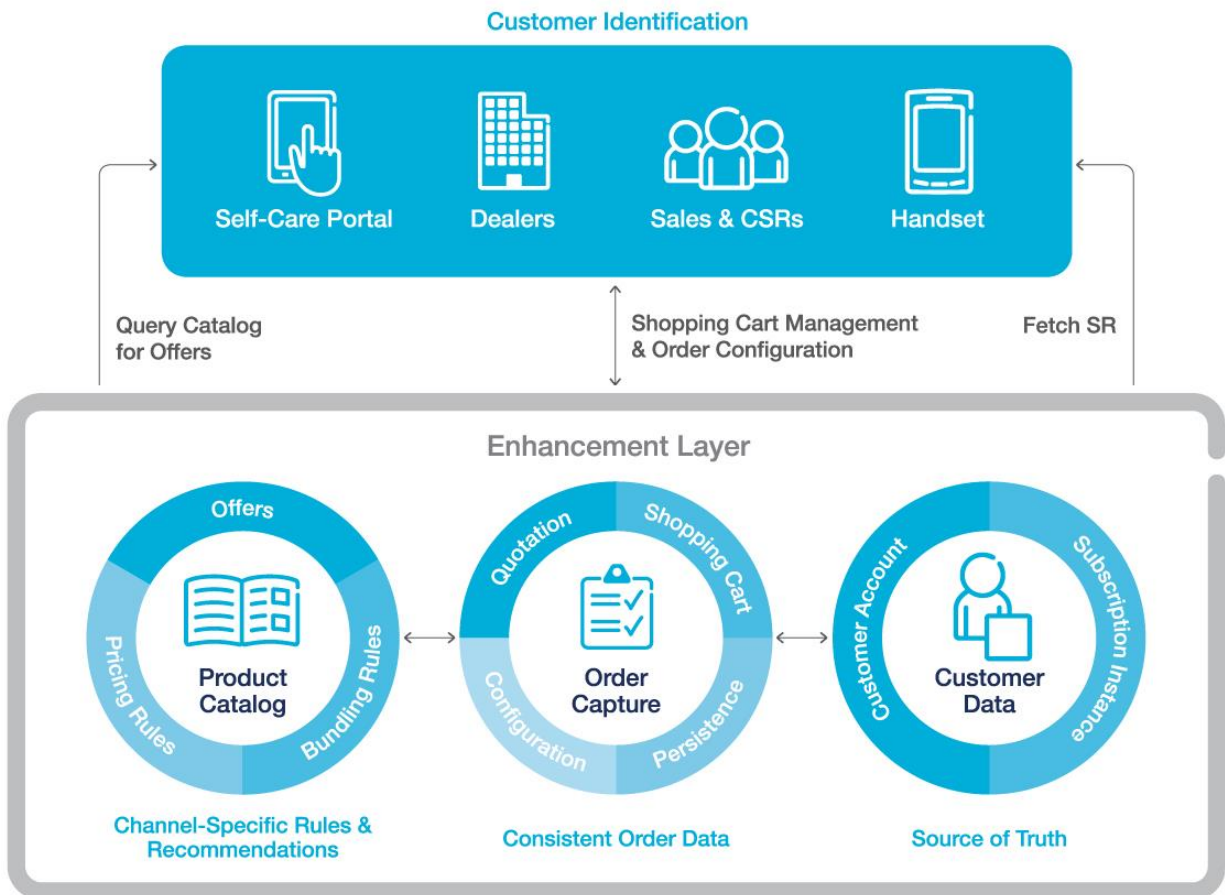
There is customer identification occurring in channels based on the central customer data function. The offers and promotions with pricing and rules are centralized and made available to channels based on channel-specific rules. There is a centralized ordering engine
that enables the shopping cart and the quote. It also provides order configuration activities based on the offer inside the shopping cart.

Finally, there is a customer management function, which is the source of truth about the customer's subscription and is readily available to all of the channels.

Key Takeaways

For an operator to truly provide customers with an omni-channel experience, the solution should contain the following features:

> Catalog-driven process – centralized offer management incorporating channel-specific rules.

> Contextual quotation process – shopping cart management and order configuration is handled as a single process that is driven by customer and offer characteristics.

> Channel-specific, yet centralized – channel-specific rules are incorporated, yet the process is centralized and made available to all the channels to enable channel-hopping.

If these important features are taken into consideration during the solution selection phase, then operators will be on a path that enables them to provide a smooth and seamless omni-channel experience to their subscribers during the selling process.

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Jagadish is a strategist on Ericsson's digital business systems, drawing upon his extensive experience in designing CRM, CPQ, and product management systems for leading service providers. As a firm believer in catalog-driven architecture, he is more than willing to share his experiences and insights on this topic.