

Implementing Omnichannel Strategies

The Success Factor of Agile Processes

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Abstract

As an increasing number of customers is using multiple channels, organizations face complex challenges to offer these customer the seamless journey experience they demand. An extensive literature research resulted in the identification of agile processes as the key facilitating factor for continuously improving the customer performance within an omnichannel strategy. Besides agile processes other facilitating factors have been identified. These are the omnichannel strategy, people, organizational structure, and information systems. As little empirical evidence is available a conceptual model has been developed to test four hypotheses. The next step is to design and validate a measurement tool based on the conceptual model: the Agile Marketing Maturity Model (AM3).

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1 Introduction

Challenges for companies using more than one distribution channel as part of their marketing strategy have become increasingly complex. Up from 72% in 2011, now 83% of customers demand a seamless journey: i.e. an integrated shopping

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experience for the different channels they can use when buying from one supplier [1]. Many buyers have become accustomed to using various distribution channels at different stages of their decision-and-shopping cycles [2]. Nowadays, a majority of the customers are multichannel shoppers. Research so far has shown that multichannel shoppers, as opposed to single channel shoppers, spend significantly more money, buy more products and are more loyal [3][4][5]. Given these results, it is critical that organizations adopt a multichannel mindset and effectively employ a multichannel marketing program, as these can enhance profitability, customer experience, and customer satisfaction [4][6]. In their studies [7] Booz Allen Hamilton concludes that up to 40% of customers are not being served effectively, because companies cannot target specific customer needs with their existing channel set-ups. This suggests a substantial portion of marketing and sales budgets is being wasted. Other studies confirm that the majority of companies has not achieved channel integration [8][9].

Executives in sales, marketing and service are struggling to offer their customers a seamless journey experience [10]. Based on 12 interviews with sales executives Baumgartner, Hatami and VanderArk [11] conclude that one of the major themes for marketers is the necessity to master multichannel sales. TiasNimbas [12] held in-depth interviews with 46 sales directors from different industries on their vision and expectations of the sales profession. His main conclusion is that sales, marketing and service have to cooperate more as buyers are using more different channels. Econsultancy [13] surveyed more than 650 marketers and concludes that only 32% of the companies rate themselves as 'good' or 'excellent' in coordinating integrated campaigns across different channels, the main factors preventing effective execution in practice being lack of a clearly defined strategy, fragmentation of departments and/or poor organizational structure, disparate technology and systems, and ownership and accountability. Based on interviews with 31 executives Valos concludes that more research is needed to provide multichannel guidelines and insights for marketers to reduce multichannel marketing implementation problems as these practitioners meet vast internal challenges in areas such as organizational structure, processes, data and people [14][15][16].

2 Literature Overview

Our literature research indicates that little empirical evidence is available on the facilitating organizational factors for omnichannel management success. However, a multitude of academic articles focuses on this issue in a conceptual way. These articles identify in total five different facilitating organizational factors for omnichannel management success. These factors are: strategy, organizational structure, systems, processes and people. Table 1 presents an overview of this

literature.

Table 1: facilitating organizational factors for omnichannel management

Publication	Identified facilitating organizational factors
[14][15]	Channel strategy; organizational structure and leadership; systems integration; culture; performance measurement; reward systems
[17]	Organizational structure; systems integration; metrics and evaluation
[18]	Organizational structure; rewarding; information sharing; deployment of resources
[4]	Organizational structure; systems integration; cross-channel interaction of employees; cross-channel metrics rewarding
[19]	Organizational structure; systems integration
[20]	Systems integration; measurement; channel strategy
[21]	Data integration; coordination; channel strategy; channel evaluation; resource allocation
[22]	Multichannel strategy choices
[23]	Organizational coordination; single view of the customer; multichannel strategy
[24]	Processes; data integration
[25]	People; processes; data integration; integrated customer contact strategy
[26]	Channel leadership
[27]	Integration of information systems
[28]	Customer data integration
[29][30][31]	Data integration
[32]	Channel integration strategy; cross channel databases
[33]	Channel alignment strategy; rewarding
[34]	Superordinate goals; internal coordination
[10]	Strategy; coordination; data integration
[35]	Channel strategy
[36]	Integrated marketing and sales activities; processes and systems; organizational structures; culture

[37]	Organizational structure; processes and systems; culture; people (attitudes and behaviour)
[38]	Organizational structure; systems and processes; culture (leadership); metrics
[39]	Organizational structure; processes
[40]	Organizational structure; coordination; systems; mutual appreciation
[41]	Alignment of organizational structures
[42]	Cross-functional dissemination of information; culture (attitudes and behaviour)
[43][44]	Organizational learning; sharing intelligence; sharing resources; culture (management attitudes; team spirit; shared goals)

2.1 Facilitating factor 1 - Multichannel strategy: linking with business strategy

In literature the common conclusion is that organizations need to develop new competitive strategies in an era of multichannel marketing, with the prerequisite that the multichannel strategy is aligned with the overall business strategy. Valos (2008) states that if multichannel strategy addresses both competitor strategy and customer needs, strengthening competitive advantage and increasing customer satisfaction can both be achieved. This is confirmed by Weinberg et al. [4] who propose that ‘designing a holistic strategy constitutes a critical first step towards developing an effective multichannel marketing program.’ Hughes [25] also sees a strong ‘need for integrated customer contact strategies’ while Pentina and Hasty [32] come to the same conclusion: ‘Firms that have adopted multichannel retailing, need to develop new competitive strategies’.

Payne and Frow [20] propose that multichannel strategy should be an integral part of the ‘customer relationship management strategy’ and that both should be a congruent translation of the overall business strategy. Kabadayi et al. [10] argue that business strategy has been insufficiently linked to multichannel marketing, and they have found ‘strong support for the contention that multichannel systems make the greatest contribution to firm performance when they are properly aligned with the firm’s business strategy’. For this purpose Neslin and Shankar [23] have proposed a ‘Multichannel Customer Management Decision framework’ as a structured roadmap to link multichannel strategy with overall strategy.

2.2 Facilitating factor 2 - People: need for cross-functional collaboration

Several academics propose that internal collaboration is key for successful omnichannel management. Rouzies et al. [37] see a strong gap between marketing and sales, caused by what they call ‘different mind-sets’, and propose alignment as a performance success factor. Kotler et al. [36] conclude that strong cultural

differences between marketing and sales exist, caused by the personality types of marketers and salespeople, and that aligning them is key to improving customer performance. Webb and Lambe [34] state that two key behaviours should be used by organizations to integrate multiple channels: the use of superordinate goals internally and effective internal communication about these goals. This proves to be a major challenge for leadership

Shah et al. [38] look at this issue from the customer centricity perspective. They propose that 'change is achieved by altering behaviour patterns and helping employees understand how the new behaviours benefit them and improve performance'. All employees should behave as customer advocates and share information with their counterparts in other channels. According to Guenzi and Troilo [42] 'creating superior customer value requires changes in the company's culture, managerial systems as well as people's attitudes and behaviours', which should be a matter for the entire company. Valos [14] confirms this by stating that 'the complexity of implementing multichannel marketing requires internal structures, processes and organizational culture to be reconfigured.' Le Meunier-Fitzhugh and Piercy [43][44] add to this that 'A positive management attitude towards coordination will help to develop a culture of sharing, will allow compatible goals to be set and joint planning to take place, as well as establishing an 'esprit de corps', and developing a common vision. These activities should have a direct impact on collaboration between sales and marketing.' Again, leadership is the issue here.

2.3 Facilitating factor 3 - Organizational structure: aiming at customer centricity

Many academic articles propose that successful (channel) leadership for multichannel marketing requires organizational structures to be reconfigured, with the optimal solution being dependent on the specific situation of the organization. Rangaswamy and Van Bruggen [18] state that most organizations are not well structured for providing their customers with an integrated brand experience across channels. 'For example, in many companies, separate divisions or marketing groups are responsible for different channels. Often, no one is specifically responsible for ensuring the uniformity of customer experiences across channels.' Weinberg et al. [4] concluded that 'most companies have a difficult time with multichannel marketing because silos exist within their organizations.', which is confirmed by Van Bruggen et al. [26]: 'Without channel leadership, the consumer's experience cannot be seamless.'

According to Valos [15] 'the complexity of implementing multichannel marketing requires internal structures and processes to be reconfigured', which is confirmed by Hughes [25] who states that 'channel integration is a strategic issue potentially requiring structural changes to the organization'. Webb and Lambe [34] support

this view, calling it ‘internal coordination’, while Pentina and Hasty [32] support higher degrees of multichannel coordination and integration as this ‘can provide synergies that would mutually benefit all channels, at the same time positively affecting the bottom line.’

Schijns and Groenewoud [19] acknowledge this by proposing that a coordinated, fully integrated multichannel approach is most efficient and effective. They also indicate that this necessitates human, organizational, operational, and technological adjustments. Neslin et al. [21][23] have proposed that the question needs to be researched whether the organizational structure with regard to channel management should be independent or integrated. Based on their literature research in 2010 however, Zhang et al. [17] conclude that ‘creating the appropriate organizational structure is arguably the greatest challenge facing all multichannel retailers’ while ‘there has been very little research in the marketing literature’ on this issue.

2.4 Facilitating factor 4 - Information systems: integrating customer data across channels

There is much academic support for integrating systems and customer data across channels. Schijns et al. [19] noted that ‘most organizations now have multiple systems loosely tied together to support their supply chain. Without proper integration, these systems can create organizational roadblocks to integrating the multiple selling channels, resulting in a lack of channel connectivity.’ Ganesh [29] agrees: ‘Building and retaining a long-term association with customers requires that relationship management applications should be able to accommodate all the various channels. Rangaswamy et al. [18] state that multichannel customers often complain about the inconsistency of information and responses across channels. Consistency is considered key to customer satisfaction in multichannel settings [24]. Pentina et al. [32] acknowledge this: ‘Creating and maintaining cross-channel databases and understanding individual preferences for channel use can help firms create superior multichannel shopping experiences. This can be achieved by using Customer Relationship Management (CRM) systems.’

Rangaswamy et al. [18] therefore propose that organizations should develop methods for identifying and integrating data from various channels and analysing cross-channel customer behavior to help firms make strategic and tactical choices. Payne and Frow [20] stress that ‘a company’s ability to execute multichannel integration is heavily dependent on the organization’s ability to gather and deploy customer information from all channels and to integrate it with other relevant information’. Hughes [25] agrees: ‘Effective channel management requires that all channels share knowledge about a customer’s relationships with the company’, which is also confirmed by Weinberg et al. [4]. Neslin et al. [23] state therefore that ‘the ideal position for a firm would be complete customer data integration (CDI), or an integrated, single view of the customer across channels.’

In 2010 however, Zhang et al. [17] concluded that little had changed so far: ‘The traditional data collection and management approach is centred around each channel, which means that many retailers do not have the ability to track transaction information across channels and have no way to measure the profitability of their multichannel customers. Multichannel strategies call for a customer-centricity approach to data integration.’

2.5 Facilitating factor 5 - Processes: continuous improvement

The common view in literature is that, within omnichannel operations, processes should serve as the basis for improving performance. Hughes [25] proposes that multichannel organizations need effective processes for collecting and responding to customer feedback. However, in his case study, he could not identify organizations using these in practice. To align the activities of marketing and sales Kotler et al. [36] sketch some fundamentals for a learning organization: implementing systems to track and manage the joint activities, establishing common metrics to evaluate the overall success of these activities, and mandating the teams to periodically meet to review and improve their cooperation. Rouzies et al. [37] propose to create cross-functional teams that work on a common process with integrated goals and joint incentives. Biemans et al. [39] add to this that sharing process information within the departments involved is necessary to improve performance.

Although there is a rich body of academic literature on continuous improvement, little has been published on this subject within the context of marketing. Wilshaw and Dale [45] concluded this in 1996, and not much has changed since then. Publications on this topic are very specifically focused, e.g. on the issues of external analysis [46], campaign measurement [47] or product development [48].

The integration of continuous learning and improvement principles in processes stems from the work of Edward Deming and Taiichi Ohno [49]. Based on the early works of Shewhart, Deming formalized continuous improvement in the still widely used plan/do/check act cycle [50]. Ohno used this cycle as the basis for continuous improvement (‘Kaizen’) processes as the core of the Toyota Production System, which ultimately resulted in the continuous improvement approaches used within Lean and in Agile methods such as Scrum and Lean Startup [51][52][53]. The same principles can be found in the ‘Internal Business Process’ and ‘Learning and Growth’ sections of the balanced scorecard approach [54].

As managing an omnichannel operation is dynamic and complex by nature, this is very well suited for deployment of continuous improvement processes. However, as mentioned earlier, no academic research is available on this yet.

3 Conceptual Framework

Currently, the deployment of lean and agile is gaining ground within marketing to create an adaptive operation that incrementally develops its strategy by experimenting [55], which is especially relevant for the dynamics and complexity of omnichannel operations. Blank [56] claims that using the ‘lean startup’ methodology, which combines elements of lean and agile, results in fewer failures than using traditional approaches. Referring to the Agile Marketing Manifesto principles, he describes these principles as a methodology that ‘favours experimentation over elaborate planning, customer feedback over intuition, and iterative design over traditional big-design-upfront development’ in focusing on continuous improvement processes to create value more effectively. Recently, he sees large companies beginning to implement the lean startup methodology. However, so far not much has been written about the implementation of agile and lean in marketing practice [57][58][59][60].

Our literature study on the facilitating factors for omnichannel management and the application of the lean startup methodology, has lead us to the following problem statement:

Within an omnichannel strategy, what impact do facilitating organizational factors have on the quest to continually improve performance?

This problem statement is elaborated in a conceptual model, containing the following hypotheses (see figure 1):

- H1: Cooperation within the omnichannel operation between the people who are responsible for individual channels facilitates agile processes.
- H2: Central coordination of the omnichannel operation facilitates agile processes.
- H3: Deployment of integrated customer data from information systems across the omnichannel operation facilitates agile processes.
- H4: Deployment of agile processes within an omnichannel operation improves customer results.

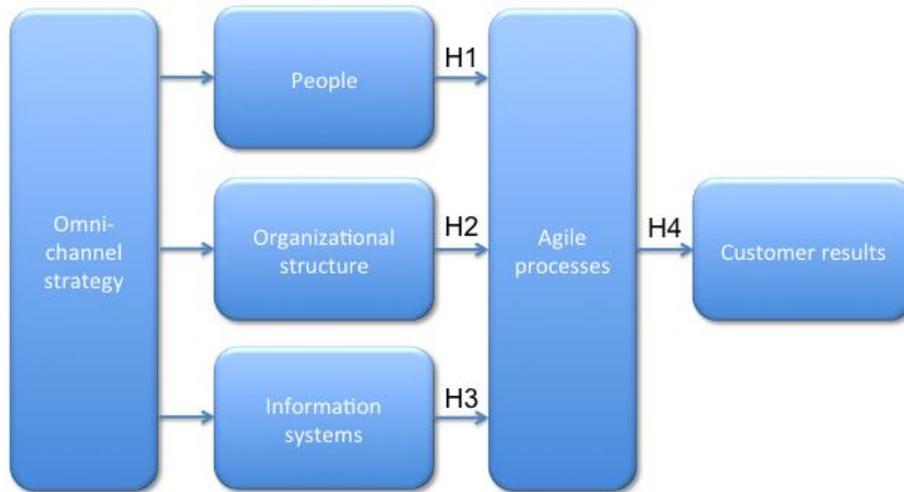


Figure 1: conceptual model

The definitions of the variables in the conceptual model are based on the definitions as used by the European Foundation for Quality Management (EFQM):

- People: the way individuals within the organization interact with each other and with stakeholders outside the organisation, based on the specific collection of values these individuals share and the way their activities are coordinated;
- Organizational structure: the way task allocation and coordination are directed towards the achievement of organizational goals;
- Information systems: the way information is managed to support decision making and build organizational capabilities;
- Agile processes: the set of activities that add value by transforming inputs into outputs, enabling the organisation to adapt in a timely way and continually improve its performance through incremental change;
- Customer results: the outcomes for customers that demonstrate the effectiveness of the organisation's deployment of its strategy and processes.

4 Discussion, Conclusions and Recommendations

Many organizations face complex challenges to offer the seamless omnichannel journey experience their customers demand. Based on the literature research it can be concluded that little empirical evidence is available on organizational factors facilitating omnichannel management success. However, a multitude of academic articles focuses on this issue in a conceptual way. This enabled the identification of five facilitating organizational factors for improving business results within a multichannel strategy. These factors are strategy, organizational structure, systems,

processes and people.

The most important conclusion is that the deployment of lean and agile processes are very relevant for the dynamics and complexity omnichannel operations, but that not much has been published about the implementation of lean and agile in marketing practice.

The identification of the facilitating factors resulted in the definition of a conceptual model and four hypotheses. The conceptual model and hypotheses will serve as a basis to empirically determine what impact facilitating organizational factors have on the quest to continually improve performance within an omnichannel strategy.

The next step is to design and validate a measurement tool based on the conceptual model: the Agile Marketing Maturity Model (AM3). Besides this, it would be useful if more academic research would be performed on deployment of agile processes in the marketing, sales and service practice.

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