Case Study: Small Company

You are a trainer working for a small company that is looking to incorporate omnichannel for the first time. Funds and resources are limited. Currently, representatives are conducting calls face-to-face and utilize their CRM to input data following their engagement. Field force has access to a repository of approved messages to deploy via email.

Where does this company fall on the maturity curve?

What tactics can be implemented for this company?

What are requisite skills to pull through?

After brainstorming this question, please visit Kiosk 1 to learn about potential tactics to deploy for this company. → **1**

Case Study: Mid-Size Company

You are a trainer working for a mid-size company that is looking to further build their omnichannel capabilities. Currently, field force is conducting calls face-to-face and sending out emails using approved messages following their calls. They are receiving nudges from the AI engine with next best actions but are not consistent in their utilization of these suggestions or in putting data back into the system. The company has increased funds to bolster the program and is eager to expand their capabilities but will require buy-in from field force first.

Where does this company fall on the maturity curve?

Describe ways to position omnichannel for success

What are requisite skills to pull through?

After brainstorming this question, please visit Kiosk 2 to learn about potential tactics to deploy for this company.
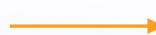
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Case Study: Large Company

You are a trainer working for a large company that has robust omnichannel capabilities. Currently, emails are automatically triggered following customer engagements. Multiple channels are being leveraged and real-time data is accessible to field force. Field force is expected to put data back into the AI engine, making it more intelligent. CRM AI processes data and reports out suggested next best actionable steps via individualized customer snapshots. Field force is now being monitored and evaluated on their response to AI nudges and implementation of next best actions. How do you, as trainers, manage the expectations and pull through of these expectations?

Where does this company fall on the maturity curve?

What tactics can be implemented for this company?

What are requisite skills to pull through?

After brainstorming this question, please visit Kiosk 3 to learn about potential tactics to deploy for this company.

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