CDS Global
A HEARST COMPANY

The Omnichannel Formula
How to Build Loyalty & Drive Revenue

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INTRODUCTION

In today's landscape, no matter the sector—whether you're a nonprofit building relationships with donors, a media company engaging subscribers, or an association retaining members—your audience craves an experience that feels like belonging to a community. They want to feel like "members," not just passive participants. This sense of connection is not only gratifying, but also drives loyalty, elevates members into brand advocates, and drives sustainable growth for your organization. For organizations looking to drive the deeper relationships and build the community experience their members crave, adopting an omnichannel engagement strategy is one of the most effective approaches.
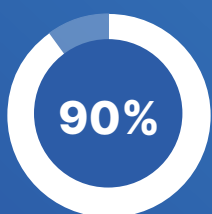
90%
of consumers expect consistent interactions across channels.

(Source: Salesforce)

Brands with strong omnichannel strategies retain 89% of customers, compared to 33% for weak strategies.

89%
Strong Omnichannel Strategies

33%
Weak Strategies

(Source: Aberdeen Group)

Personalized omnichannel campaigns achieve a

250%
higher engagement rate than single-channel ones.

(Source: Omnisend)

Achieving this kind of integration is far from simple, many organizations struggle with:

- ◉ Fragmented Technology and Data
- ◉ Limited Resources
- ◉ Uncertainty About Audience Preferences
- ◉ Consistency Challenges
- ◉ Difficulty Infusing Brand Personality

Despite these challenges, organizations that embrace an omnichannel approach reap transformative benefits:

- ◉ Elevated Member Experiences
- ◉ Deeper Relationships with Members
- ◉ Increased Retention and Loyalty
- ◉ Decreased Churn
- ◉ Higher Revenue and Lifetime Value
- ◉ Stronger Brand Image

By designing every engagement and interaction to work together, you can provide a more cohesive, impactful experience—one that not only captures attention but also creates meaningful, lasting connections with your members.

Learn how to create an omnichannel engagement strategy that sets you up for success.
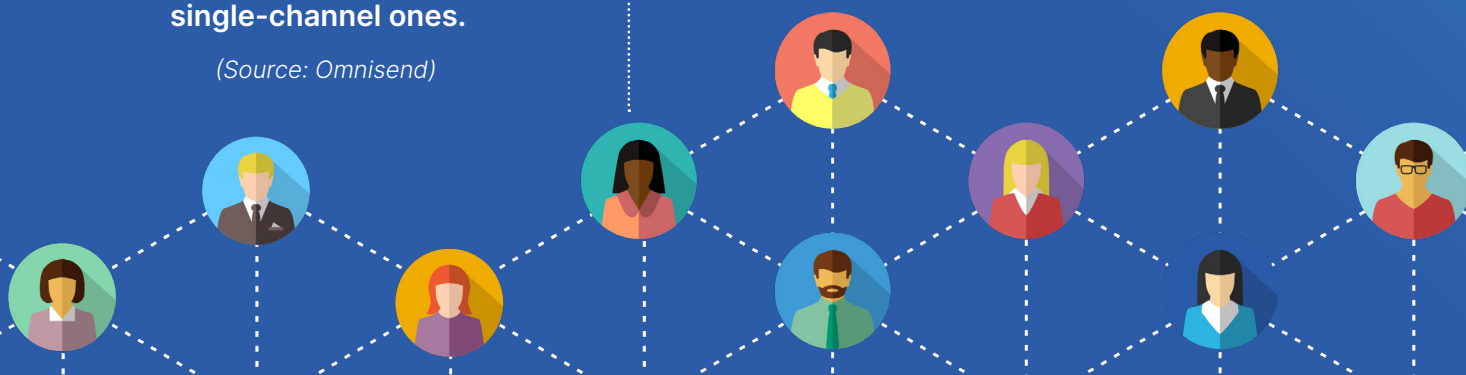
UNDERSTANDING THE OMNICHANNEL EXPERIENCE

Building an effective omnichannel engagement strategy goes beyond just pushing messaging on your audience across every channel possible. Brands today are already connecting with their members across more channels than ever—social media, email, websites, apps, and in-person events. However, as your engagement touchpoints expand, it's essential to view them as part of one unified strategy rather than planning each channel in isolation. From your member's perspective, every interaction—whether it's an email, a social ad, or a support call—is part of a single, interconnected experience. The key to creating a seamless experience that drives connection is to embrace an interconnected strategy that allows members to move seamlessly between channels and delivers value through every interaction.

Multichannel vs. Omnichannel
What's the Difference?

MULTICHANNEL

VS

- Channels operate independently, with separate strategies for each.
- Messaging and branding often vary from one channel to another, creating a disjointed experience.
- Members are funneled into channels based on organizational priorities, not preferences.
- Lack of integration makes it difficult to maintain consistency or track the full member journey.

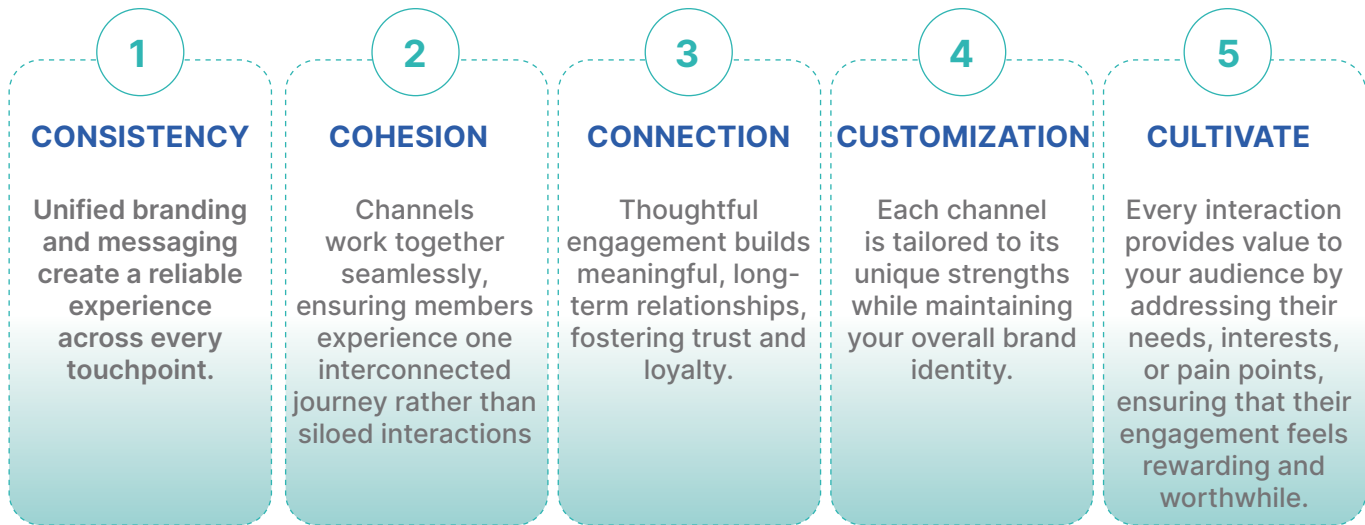### OMNICHANNEL

- Channels are interconnected, working as part of a single, unified strategy.
- Messaging and branding are consistent across every platform, maintaining cohesiveness.
- Members have the flexibility to engage in the ways they prefer, seamlessly transitioning between channels.
- Data is centralized, enabling personalized engagement and a complete understanding of the member journey.

The Five Pillars of Omnichannel Engagement

While your strategy will be unique to your organization and audience, every effective omnichannel strategy relies on these 5 foundational pillars:

1	2	3	4	5
CONSISTENCY	**COHESION**	**CONNECTION**	**CUSTOMIZATION**	**CULTIVATE**
Unified branding and messaging create a reliable experience across every touchpoint.	Channels work together seamlessly, ensuring members experience one interconnected journey rather than siloed interactions	Thoughtful engagement builds meaningful, long-term relationships, fostering trust and loyalty.	Each channel is tailored to its unique strengths while maintaining your overall brand identity.	Every interaction provides value to your audience by addressing their needs, interests, or pain points, ensuring that their engagement feels rewarding and worthwhile.

Omnichannel Engagement in Action

One of our clients, a leading nonprofit association, exemplifies the 5 pillars of an omnichannel engagement experience in their mission-driven support strategy.

1 CONSISTENCY
As they expanded their contact channels, they ensured every interaction reflected their signature "service with a hug," creating a seamless and familiar supporter experience.

2 COHESION
By adding live chat as a support channel (now 50% of all support contacts) and scalable solutions to handle seasonal demand, they made support accessible anytime, anywhere while keeping wait times low.

3 CONNECTION
They introduced custom hold music with messages from those impacted by their mission, deepening emotional connections and making every interaction more meaningful.

4 CUSTOMIZATION
Each channel plays to its strengths while reinforcing their mission. Personalized hold music enhances phone interactions, and scalable support solutions ensure a smooth experience year-round.

5 CULTIVATE
Every touchpoint—whether informative, personalized, or responsive—is designed to enrich donor experiences and strengthen engagement.
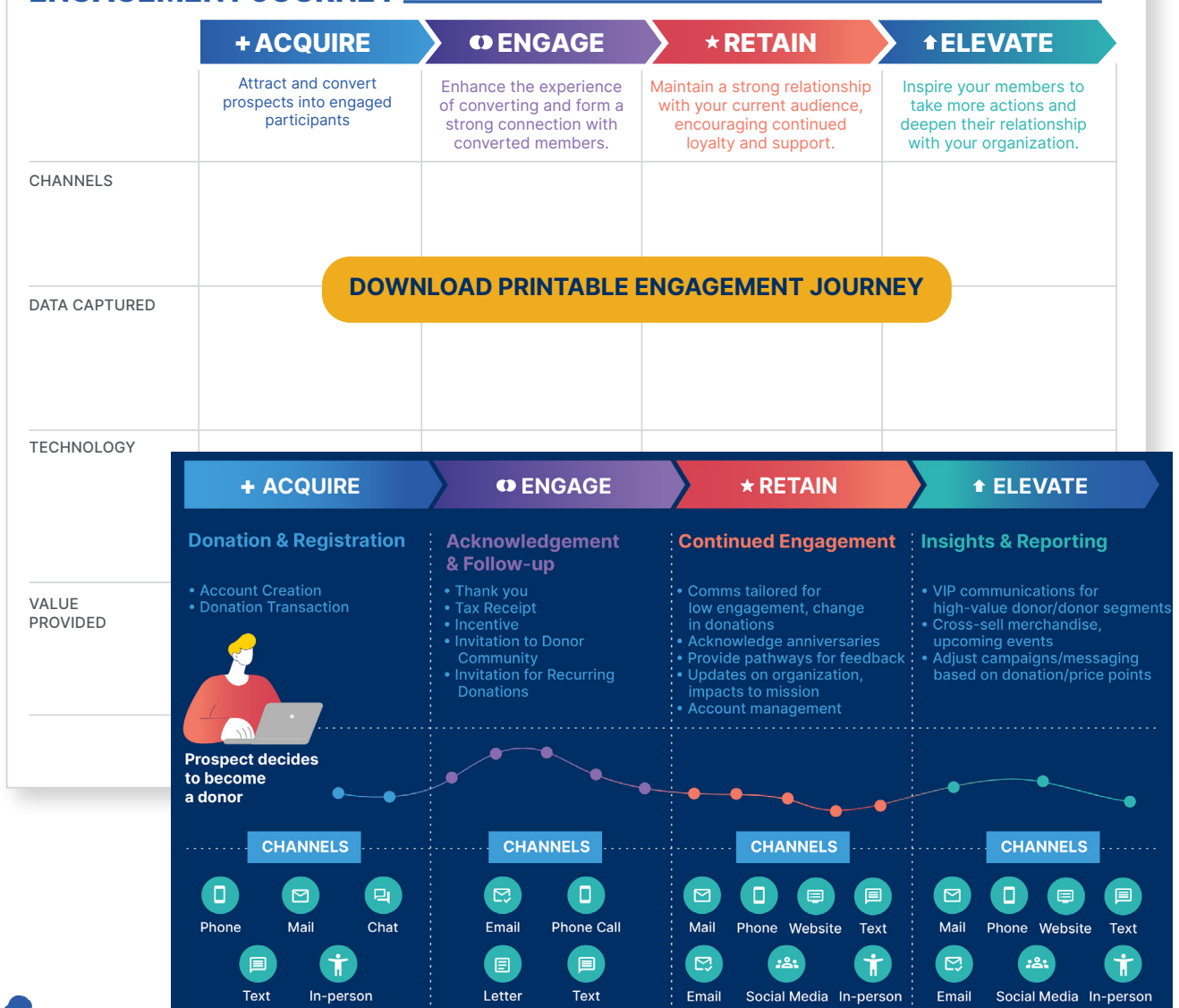
The Result: Enhanced experiences and deeper engagement.

MAPPING THE ENGAGEMENT JOURNEY

Every interaction your audience has with your organization is part of a larger journey—the member journey. Your engagement strategy should intentionally align with this journey, meeting your audience's needs at every stage while guiding them seamlessly from first contact to long-term loyalty. By mapping out your engagement journey, you can identify key touchpoints where your messaging, channels, and technology intersect to drive meaningful connections at every turn.

MAPPING YOUR ENGAGEMENT JOURNEY

	+ ACQUIRE	◑ ENGAGE	★ RETAIN	⬆ ELEVATE
	Attract and convert prospects into engaged participants	Enhance the experience of converting and form a strong connection with converted members.	Maintain a strong relationship with your current audience, encouraging continued loyalty and support.	Inspire your members to take more actions and deepen their relationship with your organization.
CHANNELS				
DATA CAPTURED				
TECHNOLOGY				
VALUE PROVIDED				

DOWNLOAD PRINTABLE ENGAGEMENT JOURNEY

+ ACQUIRE	◑ ENGAGE	★ RETAIN	⬆ ELEVATE
Donation & Registration	**Acknowledgement & Follow-up**	**Continued Engagement**	**Insights & Reporting**
• Account Creation • Donation Transaction	• Thank you • Tax Receipt • Incentive • Invitation to Donor Community • Invitation for Recurring Donations	• Comms tailored for low engagement, change in donations • Acknowledge anniversaries • Provide pathways for feedback • Updates on organization, impacts to mission • Account management	• VIP communications for high-value donor/donor segments • Cross-sell merchandise, upcoming events • Adjust campaigns/messaging based on donation/price points

Prospect decides to become a donor

CHANNELS
- Phone
- Mail
- Chat
- Text
- In-person

CHANNELS
- Email
- Phone Call
- Letter
- Text

CHANNELS
- Mail
- Phone
- Website
- Text
- Email
- Social Media
- In-person

CHANNELS
- Mail
- Phone
- Website
- Text
- Email
- Social Media
- In-person

ENGAGEMENT JOURNEY EXAMPLE

Using our journey framework, map your existing engagement strategy to your audience journey:

1

Identify the channels you'll leverage to engage your audience.

2

Determine the key data points you want to collect from your audience at interactions in each stage.

3

Identify the tools and technology you'll use to power interactions in each channel across the journey.

4

Determine how each interaction delivers value to your audience.

5

Connect the Dots.
- Explore how these interactions are connected across platforms.
- Assess how information flows between your tools and systems.
- Evaluate both the front-end experience (what members see) and the back-end processes(how data is handled).

6

Find Breakdowns.
- Look for gaps or inefficiencies. Are there points where the journey feels fragmented or disconnected?
- Pinpoint areas where interactions don't flow seamlessly or where data isn't being effectively shared between systems.

7

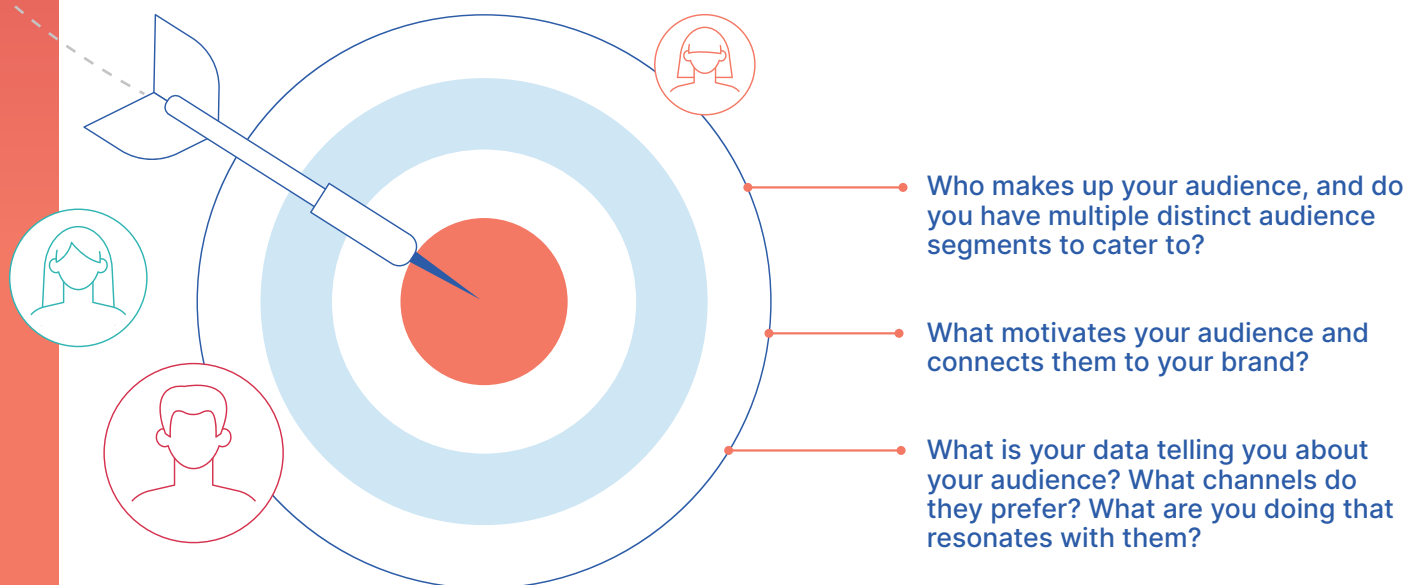**Close the Gaps.** What could you do to make your engagement strategy more comprehensive?

Implementing an effective omnichannel strategy requires more than individual tools—it demands systems that work together. Integrated platforms allow you to consolidate data from every channel and interaction into one comprehensive user profile, allowing you to see the full picture and extract better insights to inform your strategy.

LEARN MORE

MAKING YOUR STRATEGY AUDIENCE-CENTRIC

At the heart of every successful omnichannel strategy is a deep understanding of your audience. To truly engage, your strategy must be tailored to their needs, behaviors, and preferences. Personalization is no longer a "bonus"—it's an expectation. By putting your audience first and tailoring every interaction accordingly, you can build stronger, more meaningful connections that inspire long-term loyalty and support.

Understand Your Audience

Who makes up your audience, and do you have multiple distinct audience segments to cater to?

What motivates your audience and connects them to your brand?

What is your data telling you about your audience? What channels do they prefer? What are you doing that resonates with them?

Once you understand your audience, tailor your engagement strategy to their needs and preferences. Key concepts to keep in mind as you tailor your strategy:

Focus on the Experience

- Remove barriers wherever possible, such as enabling single sign-on (SSO), adding more payment options, and offering multiple contact channels.
- Regularly review your member journey through a critical lens to identify areas for improvement.
- Consolidate data into a centralized platform to give you a full picture of the member journey and spot potential gaps in the experience.

Ex: We help clients enhance member experiences by offering a courtesy callback option for phone support and AI powered live support options, reducing wait times and respecting their valuable time.

Create Authentic Moments

- Find ways to remind your audience of their connection to you in every interaction.
- Infuse your brand personality into every engagement point.
- Stay clear of fleeting trends that don't align with your brand personality; preserve your authenticity by staying true to your core values.

Ex: With our social media monitoring service we help you engage in real-time conversations with members, fostering deeper connections.

Offer Personalization That Resonates

- Make users feel seen by tailoring content, experiences, and communication based on their needs and past behaviors.
- Reinforce connections by acknowledging members' importance and their impact on your organization.

Ex: We create custom welcome packages that make new members feel valued from day one. Each package includes a personalized letter highlighting the impact of their gift or membership, along with a premium lapel pin—transforming appreciation into advocacy.

Deliver Return Value

- Offer incentives, recognition, and perks for loyal members.
- Make sure your audience is receiving something out of every interaction, whether it's information, a product, or a great experience.

Ex: Through our premium procurement and fulfillment services, we enable clients to offer exclusive, limited-time incentive rewards, making participants feel valued and recognized.

Ideas for Elevating the Engagement Experience

- Meet your audience where they are by expanding your available engagement channels so it's more convenient to reach you.

SMS	PHONE	EMAIL	WEB CHAT	WRITTEN	AI CHAT	SOCIAL	AI EMAIL	SURVEYS

- Speak your audience's language—literally. Offer multilingual support so that your audience can engage with you in their preferred language.
- Offer exclusive incentives that tie into your brand so your audience can proudly display their support.
- Let your audience influence you by gathering feedback and using the data to guide your decision-making.

Customers engage more on social media than any other channel!

LEARN MORE

MAXIMIZING CHANNEL EFFECTIVENESS

An effective omnichannel strategy isn't about being present on every platform—it's about choosing the right mix of channels that resonate with your audience and align with your organization's goals. By understanding how to best utilize each channel and selecting them thoughtfully, you can create impactful engagement that drives connection and results.

CHANNEL	BEST USED FOR	PRIMARY AUDIENCE
Social Media	Building brand awareness, sparking conversations, and fostering community.	Most popular channel for younger audiences (Gen Z & Millennials) but audiences are highly variable between platforms, with Facebook skewing older and TikTok skewing younger.
Direct Mail	Personal, tangible outreach that stands out in a digital world.	Effective for older demographics (Gen X & Baby Boomers) and high-value customers who appreciate physical touchpoints. High impact touchpoint for younger audiences (Gen Z & Millennials) when used sparingly.
Email	Delivering personalized content, promotions, and ongoing member engagement.	Effective for all age groups. Millennials and Gen Z prefer short, mobile-friendly emails, while Gen X and Baby Boomers engage more with detailed, long-form content.
SMS (Text Messaging)	Deliver short, time-sensitive updates or calls-to-action and answer questions quickly.	High engagement across all age groups, especially effective for younger audiences who prefer text over calls.
Phone	High-touch, personal interactions that require direct conversation.	Preferred by older audiences (Gen X & Baby Boomers) who prefer phone calls over text.
Live Chat & AI Responses	Provide real-time support and answer questions quickly.	Preferred by Millennials & Gen Z who expect instant digital communication.
Website	Centralizing information, hosting content & offering a hub for interactions.	Essential for both new and existing members. Usability should be optimized based on audience preferences.
In-Person	Establishing trust and creating memorable, personal experiences.	Highly effective across all age groups. Best for high-value existing members, as events reinforce commitment and deepen relationships.

Best Practices for Channel Selection

01
Meet Your Audience Where They Are:
- Identify your members' preferred channels by analyzing past engagement data.
- Consider demographic and behavioral trends when deciding where to focus your efforts.

02
Avoid Channel Overload:
- Don't attempt to be on every platform if it doesn't align with your goals or audience preferences.
- Focus on a few key channels and execute them well to avoid spreading your efforts too thin.
- Consider outsourcing engagement channels to meet fluctuating demand or reallocate resources for core activities.

03
Leverage Channel Strengths:
- Play to the unique strengths of each platform. For example, use social media for storytelling and direct mail for highly personal outreach.
- Tailor your messaging to suit the nature and format of each channel.

04
Ensure Integration:
- All channels should flow into your central system to create a unified user profile. This will allow you to track engagement and assess how a member moves across the journey.

05
Be Consistent:
- Maintain consistent branding, tone, and messaging across all channels for a cohesive experience.

06
Test and Optimize:
- Regularly track performance metrics for each channel, such as response rates, engagement, and ROI.

DATA-DRIVEN DECISION-MAKING

Don't overlook the importance of data when creating your omnichannel engagement strategy. By effectively tracking engagement data and audience information across the entire journey, you can make informed decisions, refine your approach, and deliver timely, impactful experiences. Without clean, accurate, and accessible data, organizations risk missing key insights and implementing ineffective strategies.
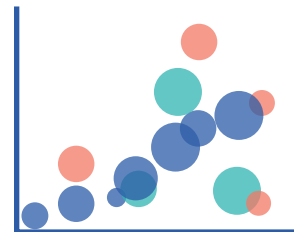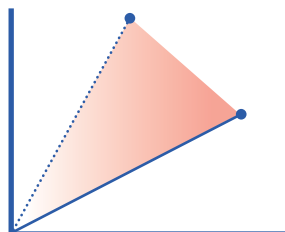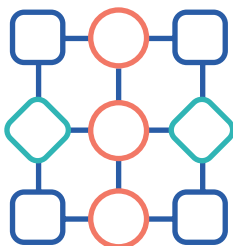

Use your existing data

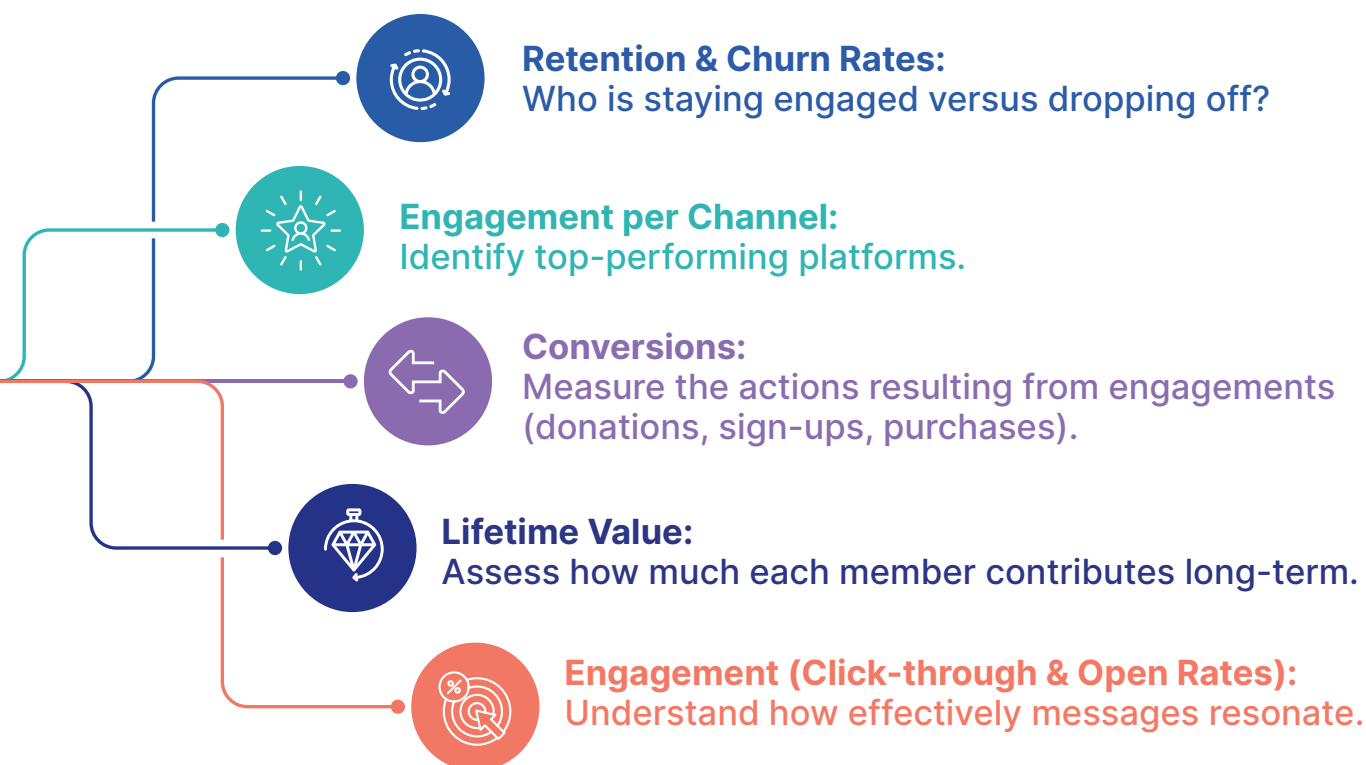| Look for patterns. | Identify gaps and areas for growth. | Find your best performing areas to expand. |

Clean and Manage Your Data with Best Practices

- Minimize fragmentation by using fewer, integrated systems that handle multiple functions, such as member management, event planning, and outreach, in one platform.
- Ensure that systems work seamlessly together by prioritizing tools with strong API capabilities, and use automation tools to reduce manual data transfers and errors.
- Create clear guidelines for entering data, ensuring consistency across all departments, especially for names, contact information, and interaction histories.
- Identify opportunities to automate data capture, reducing human errors, speeding up processes, and giving your team more time for high-value tasks.
- Perform routine audits to eliminate duplicate records, correct inaccuracies, and fill missing data. Annual or bi-annual audits are a good starting point.

Track Key Engagement Metrics

Retention & Churn Rates:
Who is staying engaged versus dropping off?

Engagement per Channel:
Identify top-performing platforms.

Conversions:
Measure the actions resulting from engagements (donations, sign-ups, purchases).

Lifetime Value:
Assess how much each member contributes long-term.

Engagement (Click-through & Open Rates):
Understand how effectively messages resonate.

Test, Adjust, and Repeat

Identifying your most valuable members and channels

Compare engagement rates over time with lifetime value (LTV) and average revenue per user (ARPU) across different audience segments and channels. This helps pinpoint where your most valuable members are most active and which engagement strategies drive the highest returns.

THE POWER OF AI IN OMNICHANNEL ENGAGEMENT

Artificial intelligence (AI) is revolutionizing how organizations connect with their audiences. As a powerful tool, AI can transform an omnichannel engagement strategy by automating tasks, uncovering insights, and enabling personalized, real-time interactions at scale. By leveraging AI, organizations can engage members more effectively while optimizing their efforts across every channel.

Use Cases for AI in Your Omnichannel Engagement Strategy

01

Predictive Analytics & Data Analysis:

Use AI to analyze historical data and predict future audience behaviors, allowing you to anticipate needs and take proactive actions.
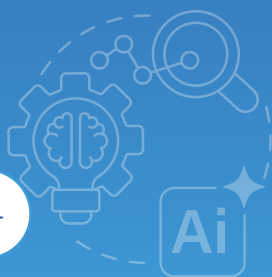
02

Scalable Personalization:

Deliver hyper-personalized content, recommendations, and experiences at scale using insights powered by AI-driven audience segmentation.

03

Sentiment Analysis:

Analyze language, tone, and engagement data to gauge audience sentiment, enabling you to fine-tune messaging and address concerns proactively.

04

Multilingual Support/ Real-Time Translation:

Break down language barriers by using AI-powered translation tools to engage a diverse audience in their preferred language.

05

24/7 AI Support:

Implement chatbots or virtual assistants to provide round-the-clock support, answer common questions, and guide users along their journey.

While powerful, AI is designed to enhance—not replace—your existing engagement strategies. To fully realize its potential, organizations must implement AI thoughtfully and strategically as a complement to human efforts.

Best Practices for Using AI

- [ ] **Start small and scale gradually**
- [ ] **Invest in quality data**
- [ ] **Collaborate with experts**
- [ ] **Focus on ethical AI**
- [ ] **Implement quality assurance procedures**
- [ ] **Continuously learn and adapt**

GET OUR AI IMPLEMENTATION GUIDE ›

Enhancing the Engagement Journey with AI

+ ACQUIRE

- AI-powered data capture and processing streamlines data entry, improving accuracy and efficiency to enhance the member experience and deliver more reliable insights to fuel your engagement strategy.

- AI-driven predictive modeling enables smarter audience segmentation and personalized offers, maximizing the impact of first-touch engagements.

⊙ RETAIN

- AI-driven automated engagement nurtures ongoing member connections, fostering loyalty through tailored, continuous interactions.

- AI predictive modeling identifies at-risk members and delivers personalized retention offers through optimal engagement channels to retain members.

★ ENGAGE

- AI driven engagement provides instant support and relevant communication, ensuring quick responses while reducing demand on support teams.

- AI sentiment analysis personalizes support while delivering actionable feedback to refine engagement strategies.

- AI-powered live translation for voice and chat enables multilingual support, allowing organizations to engage in their members' preferred language.

⬆ ELEVATE

- AI predictive modeling crafts personalized offers and re-engagement strategies, deepening member commitment and reconnecting churned members.

- AI-driven insights analyze engagement data to uncover opportunities for strategic improvement and expansion, optimizing every touchpoint for maximum impact.

CONCLUSION

Creating a successful omnichannel engagement strategy takes careful planning, intentional execution, and a clear understanding of your audience. But, when done well, it drives deeper connections with your members, fosters loyalty, and creates immense value for your organization.
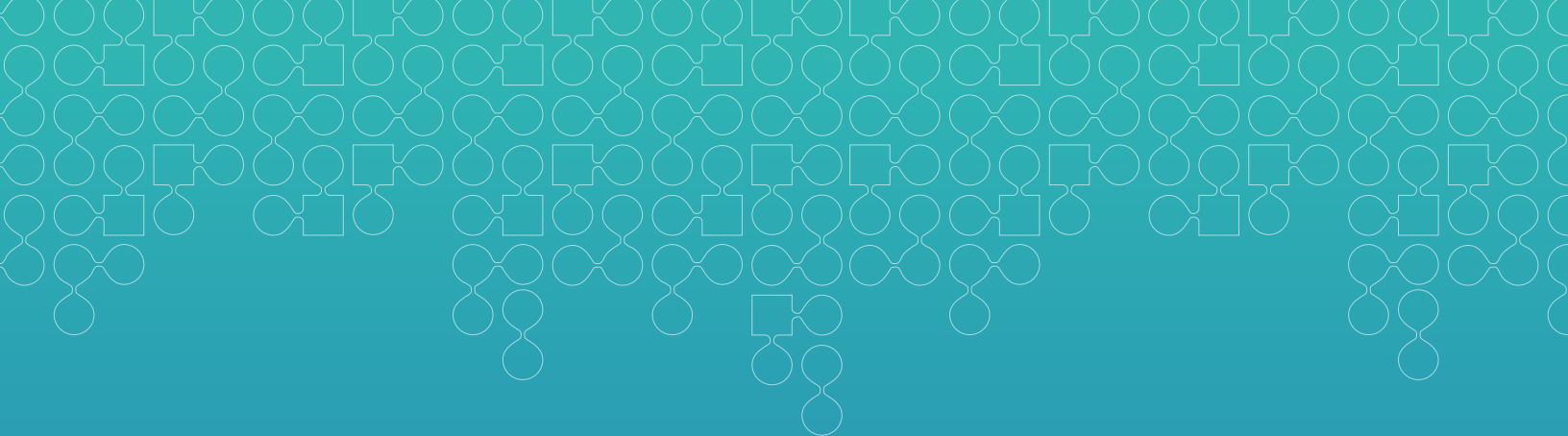
Key Takeaways:

Omnichannel engagement strategies create consistent, seamless experiences that meet audiences where they are and deliver value with every interaction.

Your strategy should be adapted to your audience, cater to channel strengths, and maintain the essence of your brand in every engagement point

AI and data-driven insights fuel smarter, more impactful engagement strategies.

Assess your current strategy and take steps today to implement a truly omnichannel approach. By refining your efforts, you can enhance engagement, increase retention, and future-proof success!

Ready to implement an omnichannel engagement strategy that drives impact and builds deeper relationships with your members?

Let's talk.

REQUEST A MEETING »

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