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Sales team adaptation to omni-channel marketing: A case study analysis of multi-touchpoint strategies in enhancing customer experiences

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Abstract

This study examines how retail, hospitality, and healthcare sales teams adjust to omni-channel marketing. Omni-channel marketing, which integrates digital and physical touchpoints, is vital for unified customer experiences. Sales teams must adapt to manage client contacts across numerous channels and provide consistent and customised engagement to deploy it successfully. This study analyses three companies to determine how sales teams adapt to omni-channel settings, their problems, and how technology, particularly CRM systems, supports customer-centric tactics. While CRM tools and data analytics help sales staff tailor encounters, success depends on comprehensive training and interdepartmental coordination. All sales teams said digital literacy and cross-channel communication were crucial for omni-channel engagements. Industry-specific issues like hotel real-time data integration and healthcare data security hinder smooth client experiences. These findings show that omni-channel marketing tactics are useful across industries but require a personalised strategy.

Keywords: Omni-channel marketing, sales team adaptation, customer experience, multi-touchpoint strategy, CRM systems, digital transformation

Introduction

In today's digital era, consumers interact with brands across a variety of channels, including physical stores, websites, mobile applications, social media, and customer service platforms. The proliferation of these channels has fundamentally changed customer expectations, as they now demand a seamless, unified experience regardless of where they engage with a brand. This shift has led to the rise of omni-channel marketing, a strategy that synchronises multiple channels to deliver a cohesive experience that reflects the brand's identity across all touchpoints. Omni-channel marketing differs significantly from multi-channel marketing, which merely provides multiple isolated channels. Instead, omni-channel marketing aims for integration, offering customers continuity and consistency so they experience a cohesive journey as they move from one channel to another (Verhoef, Kannan, & Inman, 2015; Lemon & Verhoef, 2016) [13, 9]. As customers increasingly expect these seamless experiences, companies are compelled to adapt their strategies to remain competitive. The digital marketplace has intensified competition, making

customer experience a pivotal factor for differentiation and brand loyalty. Research indicates that companies implementing effective omni-channel strategies experience higher customer satisfaction, loyalty, and conversion rates (Payne & Frow, 2017; Kumar & Reinartz, 2016) [11, 8]. For instance, a customer might start their shopping journey by researching a product on social media, comparing prices and reviews on the company's website, and then making the purchase in-store. In an omni-channel framework, each interaction builds on the last, reducing customer effort and friction. This approach not only strengthens brand relationships but also drives growth, as customers are more likely to return to a brand that offers a streamlined, personalised experience (Homburg, Jozić, & Kuehnl, 2017) [7]. Thus, companies today view omni-channel marketing as essential to fulfilling evolving consumer expectations and achieving sustainable success.

Objective: To examine how sales teams adapt to omni-channel strategies through an in-depth analysis of specific organisational cases.

The primary objective of this research is to analyse how sales teams adapt to the demands of omni-channel marketing within specific organisational settings. Sales teams are at the forefront of customer interactions and play a critical role in implementing omni-channel strategies. Their ability to manage cross-channel engagements, personalise customer experiences, and respond to shifting customer needs determines the success of these strategies. Sales team adaptation involves not only integrating new technologies but also acquiring new skills in digital communication, data-driven decision-making, and multi-touchpoint engagement. As omni-channel strategies rely on interconnectivity and consistency, sales teams must be able to navigate multiple platforms seamlessly and access up-to-date customer data to offer personalised services (Grewal, Roggeveen, & Nordfält, 2017; Farris, Bendle, Pfeifer, & Reibstein, 2010) ^[6, 5].

Research Questions

To achieve the objective of understanding sales team adaptation in an omni-channel environment, this study seeks to address three core research questions. Each question is designed to explore critical aspects of omni-channel marketing from an organisational, technological, and customer experience perspective. The questions are as follows:

1. How do selected organisations implement omnichannel strategies?
2. What challenges do sales teams face in adapting to these strategies?
3. How does technology support or hinder customer experience within these frameworks?

Literature Review

Omnichannel marketing, which evolved from multichannel marketing, is essential in today's interconnected market. Multi-channel marketing engages customers across websites, social media, and physical stores. This method offers various touchpoints but lacks omni-channel marketing's cohesiveness (Verhoef, Kannan, & Inman, 2015) ^[13]. Instead, omni-channel marketing seamlessly connects various channels to give customers a uniform brand experience across platforms. It understands that modern customers switch channels and want continuity and personalisation at every touchpoint (Lemon & Verhoef, 2016) ^[9].

Digital technologies and consumer behaviour have driven multi-channel to omni-channel marketing. As digital transformation changes the consumer landscape, organisations must establish omni-channel strategies to match customer expectations for a seamless journey. Retailers showed that omni-channel marketing improved consumer satisfaction and loyalty, which led to adoption in finance, healthcare, and hospitality (Brynjolfsson, Hu, & Rahman, 2013) ^[3]. CRM systems, data analytics, and AI have improved, allowing businesses to see all customer interactions and provide real-time, personalised service (Grewal, Roggeveen, & Nordfält, 2017) ^[6].

Role of Customer Experience in Omnichannel Marketing

Omnichannel marketing relies on customer experience.

Omni-channel marketing aims to provide a seamless experience across all touchpoints, unlike traditional methods. According to Payne & Frow (2017) ^[11], customers value ease and demand continuity, such as moving a shopping basket from a mobile app to a website or seeing the same specials in-store as online. Smooth customer journeys that build on each other save customer effort and improve brand perception (Lemon & Verhoef, 2016) ^[9]. Companies that excel at omni-channel marketing have higher consumer satisfaction and loyalty.

Omni-channel tactics use customer data from several touchpoints to tailor engagement. Businesses can create a complete client profile by tracking preferences, purchase history, and engagement. Businesses can proactively meet client demands and make tailored recommendations with this data-driven strategy (Kumar & Reinartz, 2016) ^[8]. For instance, a customer may interact with a company on social media, study products online, and buy in-store. Brands may improve customer experience by connecting and relevantizing each stage of this journey with omni-channel strategy. The customer-centric paradigm is crucial for brand differentiation in competitive markets, as demonstrated by successful omni-channel strategies (Homburg, Jozić, & Kuehn, 2017) ^[7].

Sales Team Adaptation Challenges

Sales teams face many obstacles in multichannel environments. Omni-channel marketing demands salespeople to have digital skills and data literacy to work across platforms. In a world where digital and in-person touchpoints combine, direct sales methods are no longer effective (Grewal *et al.*, 2017) ^[6]. Today, sales teams must use CRM tools, analyse data, and manage client relationships in real time. However, rapid digital transformation can make it hard for sales teams to stay up, especially if training is inconsistent (Verhoef *et al.*, 2015) ^[13].

Access to real-time data, needed for personalisation and quick customer service, is another issue. Sales teams may struggle to provide omni-channel marketing's consistent, responsive experience without timely data. In an omni-channel architecture, sales teams must work closely with marketing and customer service to maintain brand consistency and consistent message. Organisational silos can hamper collaboration, resulting in fragmented customer experiences and mismatched sales tactics (Farris, Bendle, Pfeifer, & Reibstein, 2010) ^[5]. Training programs, data integration solutions, and a collaborative organisational culture are needed to help sales teams adapt.

Technology's Role in Supporting Omni-Channel Sales

Omni-channel marketing relies on CRM, data analytics, and AI solutions to support sales teams. CRM solutions centralise client data, offering sales teams a cross-channel perspective. This helps salespeople personalise contacts, anticipate consumer wants, and communicate seamlessly, creating a seamless omni-channel experience (Brodie *et al.*, 2011) ^[2]. Real-time updates in advanced CRM systems ensure customer profiles reflect the latest interactions, enabling responsive and relevant engagement.

Sales teams benefit from data analytics' insights into consumer behaviour, preferences, and purchases.

Salespeople can personalise their suggestions to particular clients by assessing data from different touchpoints (Kumar & Reinartz, 2016) [8]. AI-powered predictive analytics and chatbots enable proactive engagement and automate regular activities. AI can forecast customer needs or recommend products based on browsing history. These solutions boost customer satisfaction and sales team productivity by letting them focus on high-value tasks (Grewal *et al.*, 2017) [6]. These technologies are only as effective as their integration and adoption within the business, thus user-friendly platforms and extensive training are needed.

Importance of Training and Development

Sales teams need good training to succeed in omni-channel environments. Sales staff must be skilled at using CRM systems, interpreting analytics, and engaging customers in both digital and face-to-face encounters for omni-channel marketing. According to Grewal *et al.* (2017) [6] and Lemon & Verhoef (2016) [9], sales professionals who receive regular, scenario-based training are more equipped for omni-channel marketing because they can use their abilities in real-world situations. Data literacy training helps sales teams comprehend and act on consumer insights, enhancing personalisation and meeting expectations.

Omni-channel success requires cross-departmental collaboration, making cross-functional training programs crucial. Sales teams must understand marketing initiatives and communicate with customer support teams to guarantee consistent messaging and a seamless customer journey (Farris *et al.*, 2010) [5]. Investing in continual training and development makes employees more flexible to the fast-paced omni-channel landscape. Sales teams improve their skills to increase customer satisfaction and brand loyalty, giving the company an edge in a competitive market.

Methodology

The methodology for this study utilises a case study design, with a focus on in-depth data collection and analysis from multiple organisational contexts. By selecting a diverse range of organisations as case studies-ideally from industries such as retail, hospitality, and healthcare-this approach aims to explore how sales teams across different sectors adapt to omni-channel marketing. The data collected will be examined through thematic analysis to draw insights into commonalities and differences in sales team adaptation, customer experience strategies, and the impact of technology across varied industry contexts. Below, each component of the methodology is elaborated.

Case Studies

This section provides an in-depth examination of each selected organisation's omni-channel strategy, sales team adaptation, and the challenges they encounter. By exploring diverse industries such as retail, hospitality, and healthcare, the case studies highlight unique approaches and commonalities in the implementation of omni-channel strategies.

Case 1: Retail Industry

Overview of the Organisation's Omni-Channel Strategy

In the retail sector, Organisation A has implemented a robust omni-channel strategy that integrates physical stores,

a dynamic e-commerce website, and a dedicated mobile application. This approach allows customers to seamlessly transition between online and offline experiences, such as browsing products online, adding them to a virtual cart, and completing the purchase in-store. Sales personnel are equipped with tablets connected to the company's CRM, providing them access to customer profiles and browsing history, which aids in personalising in-store interactions.

Case 2: Hospitality Industry

Overview of the Organisation's Omni-Channel Strategy

Organisation B in the hospitality sector employs an omni-channel strategy that links its online booking platform, customer service channels, and in-hotel experiences. Guests can reserve rooms, schedule services, and communicate preferences before arrival through the mobile app or website, creating a seamless experience from booking to checkout. The sales and service teams rely heavily on CRM data to personalise in-hotel services based on guest preferences and booking history.

Case 3: Healthcare Industry (if applicable)

Overview of the Organisation's Omni-Channel Strategy

Organisation C in healthcare employs an omni-channel approach that incorporates patient portals, telemedicine options, and in-clinic consultations. This integrated system allows patients to book appointments, view medical records, and consult with doctors online. The CRM system centralises patient data, enabling healthcare professionals to access patient history and preferences, ensuring consistency in patient care.

Analysis and Findings

Adaptation Processes: Insights into How Sales Teams Adapted to Omni-Channel Strategies

Across the cases, a key adaptation process involved training sales teams to use digital tools and CRM systems effectively. Sales teams in all three cases were required to develop digital literacy and familiarity with CRM technology to manage customer interactions across multiple touchpoints. Organisation A focused on enhancing digital skills, while Organisation B prioritised cross-departmental collaboration, and Organisation C emphasised data security and compliance. Each organisation tailored its training to address specific industry needs, resulting in varied but effective adaptation processes.

Challenges Identified: Analysis of Specific Challenges Faced by Sales Teams across Cases

A common challenge identified across cases was resistance to adopting new technology, particularly among sales personnel accustomed to traditional methods. Organisation A's retail team struggled with this transition, while Organisation B faced issues with real-time data access. For Organisation C, data privacy and regulatory compliance added another layer of complexity. Additionally, inconsistencies in cross-departmental access to CRM data hindered seamless customer experiences, especially in Organisation B's hospitality setting.

Technology and Tools: Examination of CRM Systems, Data Analytics, and Other Tools Utilised

CRM systems were a central tool in all three cases, enabling organisations to consolidate customer or patient data across channels and personalise interactions. Organisation A used CRM for tracking customer browsing and purchase history; Organisation B relied on CRM for guest preferences and booking history; and Organisation C leveraged CRM to centralise patient records. Data analytics and AI-enhanced CRM functions were also used to anticipate customer needs, although the extent of adoption varied across cases based on industry demands and technical resources.

Cross-Case Comparisons: Key Similarities and Differences between Cases, Highlighting Industry-Specific Patterns

A comparative analysis of the cases reveals several key similarities and differences in omni-channel adaptation. While all organisations implemented CRM systems to facilitate seamless customer experiences, their approach to data usage, training emphasis, and technology integration varied based on industry demands. Retail (Organisation A) relied heavily on customer browsing and purchase history for personalised interactions, while hospitality (Organisation B) used guest preferences to enhance the in-hotel experience. Healthcare (Organisation C) prioritised secure and compliant patient data handling, with less focus on predictive analytics compared to retail and hospitality.

The cross-case comparison highlights that industry-specific demands strongly influence omni-channel strategy implementation. Retail and hospitality sectors benefit from real-time customer insights and predictive analytics, whereas healthcare prioritises compliance and patient trust. These findings suggest that while omni-channel strategies are universally valuable, their specific applications must be tailored to the regulatory, customer engagement, and operational requirements of each industry.

Discussion

The findings from this study largely align with existing literature on omni-channel marketing, particularly the emphasis on providing a seamless, unified customer experience across touchpoints. Past studies have highlighted the importance of integrating digital and physical channels to meet customer expectations for consistency and ease of transition (Verhoef, Kannan, & Inman, 2015; Lemon & Verhoef, 2016) ^[13, 9]. Similar to the literature, the case studies demonstrated that omni-channel strategies, facilitated by CRM systems and data analytics, enhance customer satisfaction by enabling personalised, cohesive interactions. However, while existing literature primarily focuses on customer-facing aspects of omni-channel marketing, this study extends the discussion to internal challenges faced by sales teams, such as resistance to digital tools and the need for cross-departmental alignment.

A notable contrast to some studies emerged in terms of the role of training. While several sources emphasise that technology can be a primary driver of omni-channel success (Brodie *et al.*, 2011) ^[2], this study suggests that without adequate training, even the most advanced technology can fall short of its potential. This finding resonates with Grewal *et al.* (2017) ^[6], who advocate for targeted training programs to equip sales teams with the digital skills necessary for omni-channel engagement. Additionally, while much of the

existing literature generalises the benefits of CRM and data integration across all industries, this study finds industry-specific challenges, particularly in healthcare, where regulatory constraints impact the extent to which data can be leveraged for personalised engagement.

Conclusion and recommendations

This study provides a comprehensive analysis of how sales teams across retail, hospitality, and healthcare industries adapt to omni-channel marketing. The case studies reveal that successful adaptation hinges on targeted training, effective CRM integration, and cross-departmental collaboration. Training equips sales teams with the digital literacy necessary for omni-channel engagement, while CRM systems support personalised, data-driven interactions. Cross-departmental alignment ensures that messaging is consistent across touchpoints, enhancing the overall customer experience. However, industry-specific challenges such as data security in healthcare and real-time data access in hospitality indicate that omni-channel strategies must be tailored to the context of each industry.

Recommendations: Strategies for Improved Training, Technology Integration, and Inter-Departmental Alignment Based on the findings, the following recommendations are proposed:

- 1. Strengthen Training and Development:** Organisations should implement ongoing, scenario-based training programs for sales teams. This training should cover CRM navigation, customer journey mapping, and cross-channel communication. Additionally, continuous learning modules focused on emerging technologies and data analytics will help sales teams stay adaptable in a dynamic environment.
- 2. Optimise Technology Integration:** To maximise the effectiveness of CRM systems, organisations should ensure that these systems offer real-time data access and integrate seamlessly with other departmental tools. Real-time data flow will support faster, more personalised customer responses, improving customer satisfaction. Investing in AI-enhanced CRM capabilities may also be beneficial for organisations with high customer volumes, enabling predictive analytics and proactive engagement.
- 3. Encourage collaborative practises across departments.** Inter-departmental collaboration is essential for maintaining a unified omni-channel strategy. Organisations should encourage regular strategy meetings between sales, marketing, and customer service teams, focusing on shared objectives and integrated metrics. Implementing shared CRM access across these teams will further enhance message consistency and ensure that customer engagement is seamless.

Future Research: Suggestions for Further Case Studies across Other Industries to Enhance Understanding of Omni-Channel Adaptation

Future research could extend this study by examining omni-channel adaptation in other industries such as finance, education, and logistics. Each of these sectors has unique requirements for customer interaction, compliance, and

technology use, which could provide additional insights into industry-specific adaptation strategies. Longitudinal studies could also be valuable, tracking omni-channel strategy implementation over time to capture changes in customer experience and sales team performance. Moreover, exploring the customer perspective would provide a holistic view of omni-channel success, shedding light on how omni-channel experiences influence loyalty, satisfaction, and brand perception.

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