

Omnichannel Marketing Strategy — Workbook

This workbook turns the course into a working omnichannel build for your own business. You will inventory every touchpoint, map it to the See-Think-Do-Care journey, plan the data unification that gives you one customer view, design coordinated cross-channel journeys, and set up attribution and holdout tests that prove real lift. Use the templates to track every touchpoint, every gap, and every experiment, and remember to leave all totals and calculated cells empty for yourself to fill.

What Omnichannel Really Means

Diagnose where you sit on the multichannel-to-omnichannel spectrum and frame your journey using See-Think-Do-Care.

Exercise: Score Your Omnichannel Maturity

Honestly assess your current state against the definitions from Module 1. Answer each prompt about your own business and decide whether each example would survive the continuity-of-context test.

- Pick one real cross-channel scenario for your business, such as a customer browsing on mobile then arriving in store or on the phone. Walk it through: does the second touchpoint know what happened at the first? Where does context drop?

- List the channels you operate today and mark each as siloed, partially coordinated, or fully integrated. Which single seam between two channels causes the most customer confusion?

- Name one expensive seam you could fix first, for example re-advertising to people who already bought. Roughly how much do you estimate that waste costs per month?

- State, in one sentence, what 'one experience' would feel like for your customer if you got omnichannel right.

Worksheet: See-Think-Do-Care Stage Definitions

Define each journey stage in your own market so the rest of the workbook has a shared model. Fill every field with specifics about your audience, not generic descriptions.

See: who is the broadest relevant audience with no intent yet

Think: what signal shows a person has commercial interest

Do: what behavior signals clear purchase intent

Care: how you define an existing customer worth nurturing

Primary goal of each stage stated as a verb (e.g. educate, convert)

One metric you will use to judge the health of each stage

The most common mistake you currently make (e.g. hard-selling the See audience)

Checklist: Foundations Readiness

- I can clearly explain the difference between multichannel, cross-channel, and omnichannel
- I have identified at least one costly seam between two of my channels
- I have defined See, Think, Do, and Care for my specific audience
- I have assigned a primary goal and one metric to each journey stage
- I have named the single biggest stage-mismatch mistake I currently make
- I have a one-sentence vision of the unified experience I am building toward

Mapping Channels and Touchpoints

Inventory every touchpoint, place each on the journey grid, and surface the gaps, friction, and contradictions to fix.

Worksheet: Touchpoint Inventory Starter

List touchpoints across every category from Module 2, including the unglamorous ones. For each, capture its owner and the data it generates, and flag whether that data currently flows anywhere.

Digital owned touchpoints (site, app, email, SMS, push, account portal)

Physical touchpoints (store, packaging, receipts, signage, events, mail)

Human touchpoints (sales, support, chat, social DMs, on-hold message)

Paid media touchpoints (search, social, display, video, retargeting)

Earned and partner touchpoints (reviews, press, affiliates, marketplaces)

Owner of each touchpoint

Data each touchpoint generates and whether it flows anywhere today

Exercise: Walk the Journey and Find the Breaks

Physically complete one real journey across at least two channels (for example phone then store, or ad then site then checkout) and narrate it. Use the gap, friction, and contradiction categories from Module 2.

- Describe the journey you walked and the channels it crossed. At which exact handoff did you first have to repeat information or hit a wall?

- List one gap (a missing next step), one friction point (something harder than it should be), and one contradiction (two touchpoints that disagree) that you found.

- For each issue, estimate how many customers hit it and how costly it is in lost sales or trust.

- Rank your top three issues by impact versus effort. Which is the high-impact, low-effort fix you will do first?

Worksheet: Touchpoint-to-Stage Map

Place each major touchpoint on the See-Think-Do-Care grid and record the customer's goal and emotion there, following the mapping method from Module 2. Fill one row per touchpoint.

Touchpoint name

Journey stage (See, Think, Do, or Care)

What the customer is trying to do here

How the customer likely feels here (confident to anxious)

Team that owns this touchpoint

Does it hand off cleanly to the next touchpoint (yes or no)

Checklist: Mapping Completeness Checklist

- My inventory includes owned, paid, and earned touchpoints, including packaging and support
- Each touchpoint lists an owner and the data it generates
- Every touchpoint is assigned to a See, Think, Do, or Care stage
- The map records customer goal and emotion, not just the action
- I have walked at least one real journey across two or more channels
- I have a ranked backlog of gaps, friction, and contradictions with owners
- The top fix is high-impact and low-effort, not a clever edge case

Unifying Data and Messaging

Plan the single customer view and tracking foundation, then govern a consistent voice with personalized relevance on top.

Worksheet: Single Customer View Plan

Plan how you will unify identity and events into one profile, following the CDP and identity-resolution concepts from Module 3. Fill each field with your real systems and identifiers.

Identifiers you can use to link records (email, phone, user ID, device ID, loyalty number)

Key events you need from each channel (e.g. product viewed, purchased, store visit)

Traits to enrich the profile (plan, location, lifetime value, preferences)

Where the unified profile will live (dedicated CDP or marketing platform acting as one)

Tools that must read the unified profile (email, ads, site, support)

Biggest current data silo to connect first

How you will keep profiles updating in near real time

Exercise: Draft Your Tracking Plan and Consent Approach

Establish the data hygiene and privacy foundation from Module 3. Define event naming and how consent flows into your data, treating both as part of the architecture.

- Write the standardized names for your five most important events (use one convention, such as Title Case or snake_case, and apply it everywhere). What was the inconsistency you found across teams?
- Describe how a data layer plus a tag manager will distribute these events to your tools without hard-coding each one.
- State which privacy laws apply to you (for example GDPR, CCPA or CPRA) and how you will capture and honor consent before data reaches your CDP.
- Explain your plan to shift toward first-party data as third-party cookies disappear. What first-party data will you collect and with what value exchange?

Worksheet: Messaging Framework

Document the voice and value proposition that keep every channel coherent, following Module 3. Fill each field so ten writers across ten channels would still sound like one brand.

Core value proposition stated in one sentence

Three proof points that support the value proposition

Brand voice and tone described in a few adjectives

Words and phrases we always use

Words and phrases we never use

Channel-specific guidance (length and style for social, email, in-store, ads)

What we personalize (relevance) versus what stays fixed (voice)

Checklist: Data and Messaging Readiness

- I have a plan for one unified profile per person with identity resolution
- I know which identifiers link records across channels and devices
- I have a written tracking plan with one consistent event-naming convention
- Events are distributed via a data layer and tag manager, not scattered tags
- Consent is captured and flows through to the unified profile
- I have a documented value proposition, voice, and do or do-not word list
- I keep voice consistent while personalizing relevance from the profile

Orchestration and Omnichannel Attribution

Build coordinated behavior-triggered journeys, choose an attribution model, and prove real lift with holdouts on a steady cadence.

Worksheet: Cross-Channel Journey Designer

Design one high-value triggered journey end to end, following the orchestration method from Module 4. Choose a journey such as welcome or cart-abandonment recovery and fill each field, including suppression rules.

Journey name and trigger event (e.g. cart abandoned, trial started)

Step 1 channel, message, and timing

Wait and branch logic (what condition moves the customer forward)

Step 2 channel and message if step 1 did not work

Escalation channel used only as a last resort (e.g. paid retargeting)

Frequency cap and channel-preference rules across the journey

Exit and suppression rules (who leaves the journey immediately)

Exercise: Choose and Justify an Attribution Model

Select an attribution approach that credits the whole journey, following Module 4. Compare your current default to a multi-touch model and plan your offline connection.

- What attribution model do your tools default to today, and which upper-funnel touchpoints does it under-credit for your business?
 - Choose a multi-touch model (first-touch, linear, time-decay, or position-based) and justify why it fits how your channels work together.
 - Describe how you will connect at least one offline outcome to digital touchpoints (loyalty ID, email at checkout, or store-visit measurement).
 - Decide whether marketing mix modeling is worth exploring for a cookieless channel-level view, and on which spend you would start.
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Exercise: Design an Incrementality Test

Plan one holdout experiment to prove real lift, following the incrementality method from Module 4. Pick your largest or most-doubted spend.

- Which channel or campaign will you test, and why is its true incremental value in doubt?
 - Define the holdout: will you use a geo holdout, an audience holdout, or a ghost-ads approach, and how large is the control group?
 - State the single metric (conversions or revenue) you will compare between treatment and control, and the time window.
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- Decide in advance: what lift result would make you increase, hold, or cut this spend?
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Checklist: Orchestration and Measurement Checklist

- At least one behavior-triggered cross-channel journey is designed end to end
- The journey escalates channels only when prior steps fail
- Frequency caps, channel preferences, and suppression rules are defined
- Anyone who converts or opts out exits the journey immediately
- I have moved beyond last-click to a documented multi-touch model
- I have a plan to connect at least one offline outcome to digital touchpoints
- I have one incrementality test designed with a clear control group and decision threshold
- I have a monthly operating rhythm to review, ship one fix, and run one test

Your Action Plan

1. Score your omnichannel maturity and name the single costliest seam between two channels to fix first.
2. Define See, Think, Do, and Care for your audience with a goal and one metric per stage.
3. Build a complete touchpoint inventory across owned, paid, and earned channels, noting owner and data flow.
4. Map every touchpoint to its journey stage with the customer's goal and emotion, and rank the gaps by impact versus effort.
5. Plan your single customer view: choose identifiers, key events, traits, and where the unified profile will live.
6. Write a tracking plan with one event-naming convention and wire consent through to your unified profile.
7. Document a messaging framework so voice stays consistent while relevance is personalized from the profile.
8. Build one high-value triggered cross-channel journey with frequency caps and suppression rules, then a second.
9. Replace last-click with a documented multi-touch model and connect at least one offline outcome to digital touchpoints.
10. Run one incrementality holdout on your biggest spend, then adopt a monthly rhythm to review, ship one fix, and run one test.

