



# AI frameworks for omnichannel experiences



**AI frameworks, tools, and resources for  
omnichannel success**

# Executive summary

Artificial intelligence is the lever that transforms standard omnichannel execution into personalized, predictive, and differentiated buyer experiences. Yet for many marketing leaders, the challenge isn't whether to use AI, but how to apply it meaningfully within existing programs.

The **AI frameworks for omnichannel experiences guide** was designed to answer that question. Built as a companion to the IDC Omnichannel Experience Playbook, this guide translates AI from theory into practice, showing how to apply AI-driven capabilities directly to the Plays you already use.

Inside, you'll find:

- **Clear frameworks** for applying AI to personalization, platform integration, creative innovation, and crisis response.
- **Practical tools and checklists** to help your teams operationalize AI within marketing, sales, and operations.
- **Direct links back to the Plays** in the Playbook, showing where AI can add the most value to accelerate pipeline velocity and improve buyer experience.

Use this guide as your AI "playbook add-on." Select the Plays you're running from the **Omnichannel Experience Playbook**, then turn here for the AI frameworks and resources to extend them. Together, the two guides equip you to orchestrate buyer journeys that are consistent, connected, intelligent, and adaptive, all in real time.



**Special note:** This guide references various technology tools and approaches. These references do NOT constitute an IDC endorsement or certification of specific tools or vendors. Rather, they illustrate possible solutions available to accomplish particular steps. IDC remains impartial toward any specific vendor or solution unless explicitly stated in IDC analyst research.





# Start here

## Which AI capability do you need to enhance your omnichannel strategy?

Use this quick guide to jump directly to the most relevant section of the guide. Each capability includes frameworks, tools, and resources designed to help you put AI into action alongside the Plays in the [Omnichannel Experience Playbook](#).

Your challenge	Supplemental AI action
Digital experiences are generic or disconnected from buyer signals	<a href="#">AI-driven personalization and conversational interactions</a>
Require stronger integration across data, CRM, and marketing platforms	<a href="#">Platform integration &amp; technical considerations</a>
Need innovative ways to stand out in an AI-saturated market	<a href="#">Original and creative AI-driven innovation</a>
Preparing for crisis scenarios and ensuring resilience	<a href="#">Crisis scenario management</a>

## How to use this guide

- ➔ **Pick the Play you’re running** from the Omnichannel Experience Playbook.
- ➔ **Find the AI section here** that aligns with the challenge you want to address.
- ➔ **Apply the frameworks and tools** to layer AI into your execution and strengthen buyer outcomes.

Together with the Omnichannel Experience Playbook, this guide equips you to orchestrate connected buyer journeys and make them intelligent, adaptive, and resilient with AI.



# AI-driven personalization and conversational experiences

Supplement to execution plays (1, 2, 3, and 5) in the complementary [Omnichannel experiences playbook](#).

Today's digital buyer expects personalization beyond the typical, often generic experiences that currently prevail. Disconnected or static interactions can lead to buyer disengagement. To effectively address these issues, marketing must transition from generic touchpoints to deeply personalized experiences driven by real-time buyer signals.

Follow these steps to implement AI-driven personalization and conversational experiences effectively:

## 01 Define and capture buyer signals

- Identify critical behavioral signals that indicate buyer intent and readiness by setting up behavioral analytics within your MAP (such as Marketo or HubSpot) that track interactions and define scoring thresholds that signify purchase intent.
- Dynamically segment buyers based on real-time behaviors and predictive analytics by implementing predictive segmentation tools (e.g., 6sense, Demandbase) that are integrated into your MAP and CRM systems, creating real-time segments based on buyer signals and predictive intent scores.
- Regularly update and refine segmentation criteria to maintain accurate targeting by scheduling monthly or quarterly segmentation reviews using analytics dashboards (e.g., Tableau, Power BI) to identify evolving signals or engagement patterns so you can update your strategy accordingly.

## 02 Transition from generic to personalized content

- Replace static content paths with personalized, AI-driven experiences tailored to buyer segments by leveraging AI-driven personalization engines (such as Adobe Target or Salesforce Einstein) integrated directly into your MAP, to define automated content sequences triggered by real-time buyer segmentation signals.
- Integrate personalization directly into CRM and MAP for immediate content delivery by configuring automated workflows within your CRM and MAP platforms that instantly trigger relevant, personalized content (e.g., personalized emails, landing pages) based on real-time buyer behavior.





## Metrics to track implementation success:

**Personalization quality:** Measure the increase in buyer engagement attributable to personalized interactions.

**Conversational effectiveness:** Measure buyer satisfaction and track positive resolutions resulting from AI-driven conversational interactions.

**Pipeline impact:** Measure improvements in pipeline velocity and conversion rates attributable to personalized buyer experiences.

**Brand trust metrics:** Regularly measure trust and transparency scores related specifically to your AI-driven personalization strategies.

By following these steps, your team can successfully transition from disconnected, generic digital experiences to personalized and engaging interactions that align with buyer expectations and business objectives.

- Continuously optimize your content strategy based on engagement data. By setting up ongoing analytics dashboards (Tableau, Google Analytics, Marketo Analytics) to monitor content performance and regularly schedule optimization meetings to adjust content paths based on clear performance insights.

### 03 Implement effective conversational AI solutions

- Select advanced conversational AI platforms that support human-like interactions using NLP and LLMs by evaluating and implementing conversational AI solutions (e.g., Cognigy, Kore.ai, Drift) into your MAP and CRM, ensuring real-time personalized interactions align with buyer signals and journey stages.
- Map conversational flows to anticipate buyer questions and proactively address their needs by using a visual conversation mapping tool (like Lucidchart or Miro) to design and document conversational flows, incorporating buyer FAQs, journey stages, and recommended responses.
- Regularly monitor and optimize conversational interactions for accuracy and buyer satisfaction by setting up a regular monitoring process using conversational analytics (integrated dashboards from Cognigy, Drift, or Kore.ai) and conducting regular quality assurance reviews, adjusting conversational scripts based on performance data.



#### 04 Establish AI governance and transparency

- Develop guidelines for ethical and transparent AI use by documenting AI governance policies and ethical guidelines, providing detailed guidance for marketing and sales teams on responsible AI usage and buyer data management.
- Regularly audit your AI-driven tools to identify biases and ensure compliance with relevant regulations by implementing regular AI audits using monitoring tools (e.g., IBM Watson OpenScale, Fiddler AI) to identify and address potential biases or accuracy issues.
- Communicate AI usage to buyers to build trust by including transparent disclosures on your website, in email communications, or during chat interactions, explaining how buyer data is used and how AI-driven decisions are made, thereby ensuring clarity and fostering buyer trust.



# Platform integration & data

Supplement to execution plays (3, 4, and 5) in the complementary [Omnichannel experiences playbook](#).

Many organizations struggle with disconnected data systems and fragmented platforms, causing delays in sales follow-ups, misalignment in marketing efforts, and ineffective buyer engagement. Effective omnichannel execution requires seamless, real-time integration of data across CRM, marketing automation, and other key platforms.

Follow these steps to successfully implement platform integration and data synchronization:

## 01 Conduct a comprehensive systems audit

- Review and document existing data flows and integrations across your CRM (Salesforce, Microsoft Dynamics), MAP (Marketo, HubSpot), and AI tools (e.g., Salesforce Einstein, Adobe Target) by using visualization tools (such as Lucidchart or Microsoft Visio) to create detailed maps of current data flows and integrations to identify gaps or disconnected systems.
- Identify critical integration gaps and manual processes by conducting workshops with marketing, sales, and IT teams to document manual processes or delays, defining and prioritizing critical gaps that limit real-time responsiveness.

## 02 Define essential integration requirements

- Identify and prioritize critical data points, behavioral signals, lead scores, and buyer intent indicators by creating a data requirements document using collaborative tools (e.g., Miro, Google Docs), detailing priority data points needed for omnichannel execution.
- Map essential data flows between platforms for immediate synchronization by using data mapping software (e.g., Lucidchart, Informatica) to define data flow pathways between CRM, MAP, and AI platforms, ensuring accuracy and clarity.





## Metrics to track implementation success

**Real-time data availability:** Time from data capture to platform update (CRM, MAP).

**Lead-to-opportunity conversion rate:** Improvement due to enhanced integration and real-time data synchronization.

**Pipeline velocity:** Measurable acceleration of lead progression directly attributed to improved platform integration.

**Operational efficiency:** Reduction in manual data management tasks and improved response times for marketing and sales.

By implementing these integration steps, your organization can overcome fragmented systems, achieve stronger alignment across your data, CRM, and marketing platforms, and drive measurable improvements in buyer engagement and business outcomes.

### 03 Establish real-time data integration

- Implement middleware or API-based solutions to connect CRM, MAP, and AI tools by deploying middleware or integration platforms (e.g., MuleSoft, Zapier, Workato) configured to ensure real-time synchronization of critical data points across systems.
- Document integration pathways and synchronization processes. By creating detailed integration documentation accessible via knowledge-sharing platforms (e.g., Confluence, SharePoint), outlining step-by-step synchronization processes and data mappings.

### 04 Develop unified buyer profiles

- Consolidate data from CRM, analytics, events, and chat interactions by implementing a Customer Data Platform (CDP) or integrated data hub (e.g., Segment, Tealium) that collects and merges data from all critical sources into unified, real-time buyer profiles.
- Utilize unified profiles to personalize buyer engagement by integrating unified buyer profiles directly with your MAP and CRM platforms, enabling personalized, timely interactions and automated outreach triggered by real-time buyer data.



## 05 Implement continuous monitoring and optimization

- Regularly track integration performance by setting up clear, real-time dashboards (e.g., Tableau, Power BI, Salesforce Reports) to monitor data synchronization, data accuracy, and response speed.
- Refine and optimize integration processes continuously by scheduling regular cross-functional optimization meetings involving marketing, sales, and IT teams, using performance dashboards and team feedback to refine data integration and synchronization processes.



# Original and creative AI-driven innovation

Supplement to execution plays (2, 4, and 5) in the complementary [Omnichannel experiences playbook](#).

In an increasingly AI-saturated marketplace, standing out requires more than just deploying AI tools. Marketing leaders must leverage AI to create truly innovative and original experiences that differentiate their brand from competitors. IDC research highlights that buyers now expect dynamic, personalized, and innovative interactions driven by advanced AI-powered creativity.

Follow these clear steps to drive original and creative innovation with AI and differentiate your brand in the market:

## 01 Identify opportunities for creative differentiation

- Audit existing content, campaigns, and buyer interactions by using content performance and engagement analytics tools (e.g., Google Analytics, Adobe Analytics, MAP analytics dashboards) to identify areas where traditional content can be replaced with innovative, AI-driven experiences.
- Focus on unique buyer signals and insights by leveraging predictive analytics and intent data platforms (e.g., 6sense, Demandbase), which are integrated with your MAP and CRM, to reveal real-time insights into buyer interests. This enables clear opportunities for personalized, novel content formats.

## 02 Deploy generative AI for original content creation

- Use generative AI to produce unique, personalized content by implementing generative AI tools (such as OpenAI, Jasper.ai, Synthesia) integrated into your content creation workflows to produce personalized videos, interactive ROI calculators, virtual demos, and immersive content tailored to buyer segments.
- Ensure content aligns to buyer segments by tagging buyer segments within your MAP and CRM, ensuring generative AI-produced content explicitly matches segment preferences, buying stages, and real-time engagement signals.





## Metrics to track implementation success

**Creative engagement rate:** Measure the engagement uplift directly attributable to AI-driven creative content.

**Conversion improvement:** Track increases in conversion rates due to the effectiveness of innovative AI-driven experiences.

**Brand differentiation index:** Measure improvements in buyer perception of your brand's creativity and innovation relative to competitors.

**ROI of creative investments:** Evaluate cost-effectiveness and performance improvements from AI-generated creative content.

## 03 Integrate AI-driven creativity across channels

- Integrate AI-generated creative content across all marketing channels by embedding AI-generated content within your omnichannel platforms—email (Marketo, HubSpot), social media (LinkedIn Campaign Manager, Sprout Social), digital advertising (Google Ads)—ensuring consistent buyer experiences.
- Regularly refine creative strategies based on buyer feedback by monitoring real-time analytics and buyer feedback using integrated dashboards (e.g., Tableau, Power BI, MAP analytics), holding regular optimization meetings to adjust creative content based on measurable performance data.

## 04 Monitor creative effectiveness and innovation

- Measure engagement effectiveness of AI-driven assets by setting up automated tracking of engagement metrics (e.g., views, interactions, conversions) using integrated analytics dashboards within your MAP and CRM, comparing AI-generated content performance explicitly against traditional content.
- Dynamically adjust content strategies for continuous improvement by scheduling regular content strategy reviews using clear insights from analytics dashboards, dynamically adjusting and optimizing creative assets and delivery channels to enhance buyer engagement



# Crisis scenario management

Supplement to execution plays (2, 4, and 5) in the complementary [Omnichannel experiences playbook](#).

In today's unpredictable market environment, marketing leaders must proactively manage potential crises to maintain buyer confidence and minimize disruption. IDC research emphasizes the importance of AI-driven tools in identifying, responding to, and recovering from crises quickly, ensuring resilience and consistency across omnichannel interactions.

Follow these steps to proactively manage crises with an effective, AI-enhanced crisis response strategy:

## 01 Develop crisis scenario plans and signals

- Identify potential crises (e.g., economic disruptions, security breaches, product issues, reputational risks) by documenting potential crises and corresponding signals using collaborative planning tools (e.g., Lucidchart, Miro), and align cross-functional teams around these defined scenarios.
- Establish AI-driven sentiment analysis tools to detect early crisis indicators by implementing AI-driven sentiment analysis platforms (such as Brandwatch, Sprinklr, Talkwalker) integrated with digital channels, social media monitoring, and internal feedback systems to provide real-time crisis alerts.

## 02 Implement real-time crisis detection and response

- Integrate AI tools into your CRM and marketing automation platforms by configuring automated crisis detection alerts within CRM (Salesforce, Dynamics 365) and MAP (Marketo, HubSpot) based on sentiment analysis signals, ensuring immediate notifications to response teams.
- Prepare AI-driven adaptive content templates and communication plans by developing adaptive content templates and predefined communication workflows within MAP and CRM, enabling rapid deployment of targeted crisis communications across channels.



## Metrics to track implementation success

**Crisis detection speed:** Measure time from initial crisis signals to the first actionable alert.

**Response effectiveness:** Evaluate buyer sentiment and confidence levels during and after crisis events.

**Recovery time:** Track speed of return to normal operations and buyer engagement post-crisis.

**Reputational impact:** Monitor brand trust and buyer perception metrics to assess the effectiveness of crisis management.

By following these steps, marketing leaders can effectively leverage AI-driven tools and proactive planning to ensure resilient, confident, and effective omnichannel responses in crisis scenarios.

### 03 Deploy proactive and transparent communication

- Leverage AI-driven personalization for proactive buyer communication by using MAP-driven personalization tools (such as Adobe Target, Marketo Personalization) to automatically deliver personalized and contextually relevant crisis communications to affected buyer segments.
- Ensure transparency and clarity in crisis communications by developing clear messaging guidelines explicitly outlining transparency standards and crisis communication protocols, ensuring consistent, trustworthy, and empathetic communication across all buyer-facing channels.

### 04 Enable cross-functional crisis management teams

- Establish clear roles and responsibilities across teams by defining and documenting crisis management roles, responsibilities, and response protocols within your internal collaboration tools (e.g., Confluence, SharePoint, Asana), ensuring rapid, coordinated action during crises.
- Use AI-driven collaboration tools for real-time visibility and decision-making by implementing AI-powered collaboration tools (such as Slack, Microsoft Teams integrated with CRM dashboards) to provide real-time crisis visibility and facilitate rapid cross-functional communication and decision-making.





#### 05 Regularly test and optimize crisis plans

- Conduct regular crisis simulations by scheduling quarterly or biannual crisis simulation exercises using predefined scenarios, testing response effectiveness and AI integrations documented within your crisis management plans.
- Continuously optimize based on real-world outcomes and assessments by documenting learnings from crisis simulations and real-world experiences, regularly updating your crisis response protocols and AI-driven tools to enhance effectiveness.



# Closing summary: Turning AI into action

AI has moved beyond the hype. For marketing leaders, the question is how to apply AI in ways that drive measurable business outcomes.

This guide has outlined practical frameworks, tools, and resources across four critical areas:

- **Personalization and conversational interactions** to re-engage buyers with relevance at every stage.
- **Platform integration and data synchronization** to eliminate silos and accelerate real-time responsiveness.
- **Creative AI-driven innovation** to differentiate your brand in an AI-saturated market.
- **Crisis scenario management** to ensure resilience, consistency, and trust during times of disruption.

Each capability is mapped directly to the Plays in the [Omnichannel Experience Playbook](#), giving you a clear path to layer AI into your existing strategies and orchestrate experiences that are connected, adaptive, and buyer-first.

Now is the time to move from experimentation to execution.

## Ready to put AI to work?

IDC can help you accelerate the adoption of AI within your marketing, sales, and operations teams. From building tailored frameworks to equipping your salesforce with AI-driven tools, IDC provides the insights and expertise you need to operationalize AI and create omnichannel experiences that stand apart.

**Contact IDC today to learn how we can partner with you to deliver AI-enabled omnichannel experiences that make a measurable difference.**



# Partner with IDC to accelerate AI in your plays

Your buyers expect seamless, intelligent experiences. IDC can help you operationalize AI to make that a reality. From building tailored frameworks to delivering practical tools for your teams, we equip you to extend the value of the Omnichannel Experience Playbook with AI.

**Contact IDC** to get started on creating AI-enabled omnichannel experiences that drive measurable growth.

