



Omnichannel experience playbook



**Orchestrating buyer engagement
in the AI age**

Executive summary

Today's B2B buyers demand seamless, personalized omnichannel experiences powered by AI, informed by real-time buyer intelligence, and consistently responsive. However, internal silos, fragmented technology, and misalignment between sales and marketing can derail even the most sophisticated strategies.

The **IDC Omnichannel Experience Playbook** provides strategic clarity and actionable guidance specifically tailored for mid-market CMOs and marketing leaders who face these challenges. This playbook is designed as a quick-reference resource, not meant to be read cover to cover, but instead structured around your immediate business needs and challenges.

How to use this playbook

- Identify your core challenge using the "Start here" table.
- Jump directly to the relevant section for targeted, practical solutions.
- Each section provides clear, actionable steps and quick reference checklists to help you get unstuck fast.

Whether you're realigning current initiatives or launching new omnichannel strategies, this playbook equips you to effectively engage buyers, accelerate pipeline velocity, and deliver measurable, sustainable business growth.



Special note: This playbook 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 play do you need today?

Facing a specific GTM challenge? Use this quick guide to immediately pinpoint the actionable strategy and AI insights you need to drive results today. Each play offers clear objectives, step-by-step guidance, and measurable benchmarks to ensure rapid implementation and impact.

Your challenge	Recommended play or section
Leads stalling or disengaging mid-journey	Play 01: Reignite a stalled nurture stream
Preparing for or recovering from a major event (live or virtual)	Play 02: Align event engagement with digital journeys
Sales team is unclear on using your content effectively	Play 03: Equip sales with signal-based content activation
Launching a new AI-driven product or repositioning an existing solution	Play 04: Execute an orchestrated GTM launch
Need a fully integrated, always-on GTM strategy	Play 05: Orchestrate the fully integrated omnichannel experience

Not sure where to begin?

If you need a comprehensive understanding of the foundational shifts in buyer engagement and why an orchestrated GTM is now critical for competitive advantage, start with [the strategic imperative](#) for an overview of what's changed in buyer engagement and why orchestration matters more than ever.





The strategic imperative

As outlined in the Executive Summary, today's buyers expect seamless omnichannel experiences closely aligned with their fragmented digital journeys. Traditional sales and marketing approaches no longer reflect the nonlinear, digital-first behaviors of modern B2B tech buyers.

IDC research highlights that 74% of these buyers now prefer digital-first engagement. They rely heavily on digital channels and AI tools for research, comparisons, and decision-making. To effectively meet these new expectations, organizations must recalibrate their go-to-market (GTM) strategies.

Key strategic shifts include:

- Leveraging real-time buyer signals for a comprehensive understanding.
- Creating personalized and adaptive content and interactions.
- Ensuring cross-functional collaboration among marketing, sales, and operations.
- Maintaining operational agility to adapt to market and buyer behavior changes quickly.

This strategic imperative serves as the foundation for recalibrating your GTM approach and orchestrating effective omnichannel experiences.

Recommended reading

- [IDC 2024 B2B Tech Buyer Behavior Survey](#) (September 2024)
- [IDC 2025 Global B2B Tech CMO Priorities Study](#) (March 2025)
- [IDC 2025 Global Midmarket Tech CMO Priorities Study](#) (June 2025)
- [IDC FutureScape: CMO 2025 Predictions](#) (November 2024)
- [Leading Through Change eBook](#) (June 2025)
- [Marketing's Imperative in the Experience Era Webinar](#) (March 2025)



Core principles for omnichannel excellence

Achieving omnichannel excellence requires foundational shifts in how organizations approach buyer engagement and internal coordination. The following principles guide your recalibrated GTM strategy, enabling a cohesive and buyer-centric omnichannel experience.

These core principles lay the essential groundwork for executing targeted strategies detailed in the subsequent plays, ensuring your organization effectively meets the evolving expectations of today's B2B buyers.

Buyer intelligence

Leverage real-time buyer signals and behavioral data for a deep understanding of your audience. Move beyond static profiles and focus instead on capturing dynamic insights to anticipate buyer needs and inform personalized interactions.

Intentional transitions

Design clear and deliberate transitions between channels, formats, and stages in the buyer journey. Ensure your content and interactions seamlessly guide buyers from one stage to the next, reducing friction and increasing engagement.

Sales and marketing coordination

Align sales and marketing teams around shared goals, unified buyer insights, and coordinated execution. Establish clear communication and workflows to ensure consistency, timeliness, and effectiveness in buyer interactions.

Optimize with agility

Establish an agile approach to continuously evaluate, iterate, and optimize your strategies. Adapt quickly to evolving market dynamics and buyer behaviors by implementing rapid feedback cycles and performance-based decision-making.

Cross-functional alignment

Create strong alignment across marketing, sales, and operations teams. Foster collaborative workflows, shared visibility, and integrated operating models to orchestrate unified omnichannel execution effectively.



Reignite a stalled nurture stream

Why this matters now

When leads disengage, it indicates misalignment between timing, messaging, and buyer needs. Re-engaging these leads is essential to accelerate pipeline velocity, optimize existing marketing investments, and reduce dependency on new lead acquisition.

Objective

Re-engage stalled leads and convert them into marketing-qualified leads (MQLs) using targeted, personalized nurture streams informed by buyer behavior.

Expected outcomes

Implementing this play yields a higher-quality MQL flow, revitalized pipelines from existing leads, and a reduced reliance on acquiring new leads.

Steps for execution

01 Diagnose the stall

- Use your Marketing Automation Platform (MAP) (e.g., Marketo, HubSpot) to run inactivity reports that filter leads who have been inactive for 15 or more days after engagement.
- Conduct a comprehensive analysis of engagement drop-off to identify specific content, messaging, or timing issues linked to disengagement.
- Use visualization tools (such as Tableau or Power BI) to identify common drop-off points quickly.

02 Define remix journey 'jobs to be done'

- Personalize content paths effectively using MAP (Marketo, HubSpot) segmentation tools to dynamically serve content tailored to persona, industry, and engagement history.
- Introduce interactive diagnostics and assessments by embedding AI-powered interactive tools (e.g., Ceros or Ion Interactive) directly into your nurture streams.
- Minimize gated content by employing progressive profiling techniques within MAP platforms to capture essential data without gating critical engagement assets.



Demand gen callout

Leverage automated behavioral scoring rules in your MAP (e.g., Marketo or HubSpot) to trigger “remix qualified” status based on predefined behavioral signals (+10 to +20 points within a week). Track nurture stream performance using customized dashboards to measure and compare lift against baseline conversion rates.

03 Deploy across channels

- Deploy nurture streams by scheduling targeted nurture streams through MAP, aligning content sequences with specific lead segments and engagement insights.
- Retarget leads by integrating your MAP and CRM with LinkedIn Campaign Manager or Google Display Ads for precise audience targeting and retargeting

04 Sales sync and signal triggering

- Enable Sales Development Representative (SDR) effectiveness by automating notifications through your CRM (Salesforce or Microsoft Dynamics) triggered by significant lead interactions.
- Provide clear SDR context by creating concise “Engagement Briefs” or summaries within CRM, including historical lead data, content interactions, and recommended follow-up steps.

05 Monitor and optimize

- Track and refine your nurture streams by establishing clear tracking dashboards (using Tableau, Domo, or Power BI) integrated with MAP and CRM for real-time performance measurement.
- Regularly refine nurture streams by setting monthly optimization meetings to review performance data, updating nurture strategies based on clear and measurable feedback.



Metrics and benchmarks

Measure success by establishing automated reporting within your MAP and CRM platforms for each of the key metrics provided and set regular review cycles (weekly or monthly) to evaluate progress against goals

Metric	Description	Goal
Reactivation rate	Percentage of stalled leads reactivated	20-30%
Conversion rate (to MQL)	Percentage of reactivated leads converting to MQLs	10-20%
Click-through rate (CTR)	Average CTR on nurture emails and digital ads	3-5%
Time-to-MQL	Average time from nurture reactivation to MQL conversion	Under 21 days

Example

Company ABC identified stalled leads by running inactivity reports through their MAP (Marketo). They deployed a targeted nurture stream by integrating Ceros for interactive diagnostics and embedded explainer videos directly into personalized email nurture paths. They retargeted leads using integrated LinkedIn campaigns aligned with specific nurture stream messages. This enabled a 28% reactivation rate and generated 14 new MQLs within just 21 days.



Align event engagement with digital journeys

Why this matters now

Events represent a significant investment and are critical inflection points in the buyer journey. IDC research reveals that 62% of buyers expect events to be seamlessly integrated into their digital follow-up streams. At the same time, over half say that personalized follow-up significantly impacts their decision to further engage. Effective orchestration of event follow-up is essential for maximizing ROI and converting attendee interest into measurable pipeline progress.

Objective

Transform event interactions into measurable pipeline outcomes by deploying tailored follow-up experiences and equipping sales with clear, actionable signals of buyer intent.

Expected outcomes

Consistent generation of qualified leads, increased efficiency in sales follow-up, and improved pipeline attribution from events.

Steps for execution

01 Map event context

- Classify event types by creating templates within your CRM (e.g., Salesforce, HubSpot) that standardize event classification and ensure consistency in reporting.
- Segment registrants and attendees by integrating registration data directly into your MAP, defining segments based on persona, industry, session registration, and buying stage.
- Prepare audience data in your CRM and Marketing Automation Platform (MAP) for targeted follow-up.

02 Activate pre-event touchpoints

- Deliver personalized pre-event content by creating automated content delivery sequences in your MAP aligned to persona-based event registration data.
- Build pre-event nurture streams using MAP branching logic defined by session topics, interest level, and historical content engagement signals.

03 Capture and score engagement signals

- Track virtual event interactions (polls, chats, asset downloads) using event management platforms (e.g., ON24, Cvent) integrated directly with your MAP and CRM for real-time scoring.
- Capture in-person event interactions (booth scans, demo participation) by using event mobile apps or scanners integrated directly into your CRM (if possible) for immediate logging and scoring.



Demand gen callout

Establish automated scoring in your MAP to segment attendees based on engagement levels (“hot,” “warm,” or “observe”) using defined behavioral thresholds such as interactions, content downloads, and session attendance. Use dynamic segmentation in your MAP and CRM to deliver tailored nurture streams and prioritize sales outreach effectively, tracking lift in event performance against baseline conversion rates.

04 Deploy personalized post-event follow-up

- Send personalized event summaries by automating post-event email templates within your MAP, aligned with attendee session interests and engagement signals.
- Offer interactive tools such as ROI calculators or diagnostics embedded directly in post-event landing pages tailored to attendee personas and interests.
- Retarget attendees effectively by integrating audience segments from your MAP into LinkedIn Campaign Manager or Google Ads, aligning retargeting messaging and content with event topics.

05 Sales enablement integration

- Provide SDRs with automated “Event Summary Cards” generated by your CRM and MAP integrations, featuring explicit attendee interactions, interests, and recommended follow-up actions.
- Include defined talk tracks and content templates that are directly accessible in sales enablement platforms (e.g., Seismic, Highspot), ensuring consistent and immediate SDR access.



Metrics and benchmarks

Track and measure your event orchestration success against these recommended benchmarks:

Metric	Description	Goal
Post-event MQL conversion rate	Percentage of event attendees converting to MQLs	10-20%
Follow-up response rate	Percentage of attendees responding to post-event follow-up	20-30%
Engagement depth	Number of meaningful interactions per attendee	3-5 interactions
Sales-Accepted Leads (SAL)	Percentage of event leads accepted by sales	25-35%

Example

Company ABC mapped attendee segments for a FinTech industry conference, targeting financial decision-makers interested in AI-driven risk management. Pre-event nurture streams were built in Marketo, aligned with personalized LinkedIn ads, driving initial registrations and engagement. At the event, booth scans and session interactions were logged and scored in Salesforce, allowing for real-time segmentation and prioritization of follow-up.

Within 24 hours, personalized follow-ups were automatically deployed through Marketo, directing attendees to tailored landing pages with interactive ROI calculators and product walkthroughs. Sales Development Representatives (SDRs) were simultaneously provided with automated Event Summary Cards outlining each attendee’s specific interactions and recommended actions. This orchestrated approach yielded 42 qualified leads within 30 days, demonstrating accelerated pipeline growth and enhanced ROI.



Empower your sales team

If you need personalized summary cards to enable your sales team, IDC can develop the tools your team needs to gain a competitive edge in their face-to-face interactions. [Contact IDC](#) to learn how we can support your sales team and help you deliver omnichannel experiences that truly make a difference.

Equip sales with signal-based content activation

Why this matters now

Buyers today expect timely, personalized interactions throughout their journey. However, nearly half of sales teams report limited visibility into buyer signals, creating challenges in delivering timely and relevant outreach. Bridging this gap by equipping sales with clear, actionable buyer insights improves conversion rates, enhances buyer experience, and strengthens marketing-sales alignment.

Objective

Empower your sales team to respond quickly and effectively by equipping them with actionable, validated buyer signals derived from content engagement and buyer interactions.

Expected outcomes

Improved conversion rates, strengthened trust between sales and marketing, and accelerated pipeline velocity through targeted, timely, and contextually relevant interactions.

Steps for execution

01 Define actionable signals

- Identify key behaviors signaling purchase intent by analyzing data from your Marketing Automation Platform (MAP) or digital analytics tools (e.g., Google Analytics, Adobe Analytics), pinpointing actions like repeated visits to pricing pages, product comparison interactions, or content downloads.
- Prioritize signals by implementing a scoring model within your MAP or CRM that weights recency, frequency, and intensity of interactions, automatically updating lead prioritization in real-time.

02 Set activation thresholds

- Collaborate with sales to define activation thresholds (e.g., cumulative scores in Marketo or Salesforce, specific content interactions such as demo requests or pricing page revisits), ensuring alignment between marketing-generated signals and sales readiness.
- Define a process for SDR/MDR validation for complex or high-value signals by setting up automated notifications in CRM to trigger targeted validation outreach.



Demand gen callout

Enhance signal accuracy and credibility by implementing automated MDR validation within your CRM or MAP. Track and measure SQL conversion rates using customized dashboards, comparing performance between MDR-validated leads and leads automatically routed to sales. This clear validation approach builds sales trust and directly improves lead quality.

03 Package context for sales

- Package summaries by using automation to generate concise “Signal Summary Cards” within CRM platforms (Salesforce, Dynamics 365), capturing detailed buyer interactions, recent content viewed, and suggested next-best actions.
- Deliver this context by integrating CRM alerts directly with sales enablement platforms (e.g., Seismic, Highspot) to ensure immediate, relevant, and actionable insights for sales teams.

04 Leverage minimal viable orchestration (if needed):

- Select one high-value signal (such as pricing page revisits or demo requests) and configure simple automation within CRM or MAP to trigger immediate MDR outreach.
- Provide MDRs with structured, scripted outreach templates in your CRM, enabling rapid validation of interest or intent, and ensuring efficient follow-up.

05 Monitor and refine continuously

- Track the effectiveness of your outreach using integrated dashboards (e.g., Tableau, Power BI, Salesforce reports), continuously monitoring follow-up response rates, MQL-to-SQL conversions, and pipeline velocity.
- Schedule monthly performance review meetings with marketing and sales teams to systematically refine signal criteria, outreach messaging, and follow-up processes, ensuring continuous improvement.



Metrics and benchmarks

Use these recommended metrics and clear benchmarks to track and demonstrate the effectiveness of your signal-based sales activation:

Metric	Description	Goal
Follow-up response rate	Percentage of buyer responses following SDR/MDR outreach	25-32%
Conversion rate (MQL to SQL)	Conversion of validated MQLs to Sales Qualified Leads	20-30%
Time-to-SQL	Average time from MQL engagement to SQL conversion	Under 14 days
Pipeline velocity	Improvement in overall pipeline progression speed	Increase by 10-20%

Example

Company ABC implemented signal-based content activation by configuring their MAP (Marketo) and CRM (Salesforce) to track and prioritize buyer interactions like product page views and demo requests. Automated CRM notifications triggered immediate MDR outreach for validation, supported by structured outreach templates and content summaries delivered through sales enablement platforms.

Within 60 days, Company ABC increased response rates by 32% and improved MQL-to-SQL conversions by 18%, demonstrating a successful implementation and a measurable impact on pipeline performance.

Execute an orchestrated GTM launch

Why this matters now

Successful go-to-market (GTM) launches require more than compelling messaging; they demand coordinated execution. Fragmented efforts across marketing, sales, and operations often undermine impact. Effective GTM launches unify teams around clear goals, ensuring high-visibility, high-urgency experiences that drive buyer interest and meaningful outcomes.

Objective

Coordinate cross-functional teams to execute a unified GTM launch strategy that blends content, messaging, and sales engagement into a cohesive and measurable campaign.

Expected outcomes

A strategically aligned, highly effective GTM launch delivering measurable outcomes, improved pipeline velocity, and demonstrated marketing impact.

Steps for execution

01 Establish clear positioning

- Define business outcomes by conducting cross-functional workshops with marketing, sales, and product teams, using cloud-based collaborative tools to document and finalize positioning frameworks.
- Ensure messaging alignment by developing shared messaging guidelines accessible in central sales enablement platforms (SEP), facilitating consistency across teams.

02 Segment and personalize content

- Segment and personalize content by creating detailed persona and buying stage maps within your Marketing Automation Platform outlining content sequences for awareness, evaluation, and validation stages.
- Leverage MAP by configuring automated workflows for persona-based content delivery, ensuring timely and relevant interactions.



Demand gen callout

Define and track engagement thresholds (“intent ladders”) within your MAP and CRM systems, based on explicit content interactions, page visits, and form completions. Use these clear thresholds to trigger immediate SDR actions, ensuring timely and relevant outreach aligned precisely to buyer readiness.

03 Plan the launch moment

- Select the launch format by using market insights and historical engagement data to determine the optimal format (virtual event, briefing, digital campaign) most likely to drive engagement.
- Create signature assets such as benchmark reports and interactive calculators using content creation platforms to enhance engagement.
- Define follow-up cadences using automated drip campaigns configured in your MAP, specifying timing (1-day, 3-day, 7-day) for post-launch communication.

04 Align and activate sales teams

- Equip SDRs with “launch briefs” by automatically generating concise engagement summaries in CRM (Salesforce, Dynamics 365), outlining buyer interactions, key content viewed, and recommended follow-up actions.
- Validate lead intent by implementing rapid outreach cadences using structured email and call scripts integrated directly into SDR workflows in your CRM.

05 Enable channel and partner execution

- Provide launch kits through a centralized Partner Enablement Portal (PEP), ensuring easy access to messaging guidelines, pitch decks, and co-branded content.
- Track partner and channel engagement by using tracking analytics embedded within the partner enablement platform, providing real-time insights into content usage and partner activity.



Metrics and benchmarks

Utilize these recommended metrics and benchmarks to measure your GTM launch success:

Metric	Description	Goal
Initial lead engagement rate	Engagement rate from initial campaign outreach	25-40%
Conversion rate (leads to MQL)	Percentage of engaged leads that become marketing-qualified leads	20-30%
Sales acceptance Rate	Percentage of MQLs accepted by sales teams	30-40%
Pipeline impact	Percentage of pipeline attributed to launch activities	Increase by 15-25%

Example

Company ABC executed an orchestrated GTM launch by segmenting content explicitly within their MAP according to financial and operational buyer personas. Signature assets, including interactive ROI calculators, were embedded in automated post-event nurture sequences.

Sales and SDR teams were enabled through automated launch briefs delivered via CRM and SEP, outlining specific interactions, interests, and follow-up guidance. This structured operational approach yielded 82 MQLs within 45 days, accelerating pipeline velocity and contributing to \$2.4 million in measurable pipeline value.

Orchestrate the fully integrated omnichannel experience

Why this matters now

Buyers experience your brand as a series of interconnected signals, content, and interactions that either build trust or break continuity. The shift to orchestrated growth demands a unified GTM system, one that senses buyer signals, sequences interactions across multiple channels, and responds in real-time. Individual plays become powerful when integrated into a cohesive marketing system.

Objective

Create a fully integrated, always-on omnichannel system by seamlessly linking audience intelligence, content strategies, cross-functional coordination, and real-time sales activation with face-to-face interactions.

Expected outcomes

An orchestrated omnichannel buyer journey with powerful moments that improve buyer engagement, accelerate pipeline growth, and deliver consistent and measurable business outcomes.

System architecture: Integrating plays for maximum impact

01 Audience intelligence integration (leveraging [Play 01](#) and [Play 03](#))

- Define ideal customer profiles (ICP) and buying committees by leveraging historical and real-time buyer insights from your Marketing Automation Platform (e.g., Marketo, HubSpot) and CRM (Salesforce) alongside predictive AI tools (6sense, Demandbase) to define ICPs and identify buying committees dynamically.
- Segment and prioritize audiences dynamically by implementing AI-driven segmentation within MAP and CRM platforms, explicitly defining segments based on real-time signals like content engagement, repeat visits, event participation, and predictive intent scores.

Moments created:

A previously stalled lead re-engages instantly after receiving personalized content that references their recent event attendance, demonstrating awareness of their specific interests.



02 Content sequencing across the journey (leveraging [Play 01](#), [Play 02](#), and [Play 04](#))

- Map and align content to buyer journey stages by tagging content assets within your MAP (Marketo, HubSpot) to explicitly align to buyer stages (awareness, consideration, decision), informed by real-time analytics from events (Play 02) and GTM launches (Play 04).
- Strategically automate content delivery by configuring automated nurture sequences triggered by real-time buyer signals, ensuring the right content reaches the buyer at precisely the right moment across multiple channels.

Moments created:

A buyer attending a webinar receives immediate personalized follow-up, including an interactive ROI calculator presented in a subsequent face-to-face sales meeting, linking digital content with an in-person interaction.

03 Channel interlock and continuity (leveraging [Play 02](#) and [Play 04](#))

- Implement real-time cross-channel coordination by using integrated dashboards (Tableau, Power BI, Salesforce) linked to your MAP and CRM systems to provide real-time visibility and proactive coordination of email, social, digital ads, events, and SDR outreach.
- Optimize buyer experiences based on channel insights by leveraging event data (Play 02) and GTM launch insights (Play 04) explicitly fed into analytics dashboards, allowing real-time adjustments to buyer experiences for consistency across every channel.

Moments created:

A prospect engages with personalized digital ads, and during an in-person industry conference, experiences consistent and aligned messaging reflecting their online interactions, reinforcing trust and brand confidence.



Demand gen callout

Establish omnichannel orchestration dashboards within your MAP, CRM, and analytics tools to track buyer engagement systematically across all plays. Use regular A/B testing at the play level to quickly refine your omnichannel approach, ensuring continuous improvement in buyer engagement and accelerated pipeline velocity.

04 Sales and SDR signal activation (leveraging [Play 01](#) and [Play 03](#))

- Establish automated sales activation thresholds by configuring automated alerts and engagement summaries in your CRM (Salesforce, Dynamics 365) triggered by high-value buyer signals from MAP (Marketo, HubSpot), such as repeated pricing page views, product comparison interactions, or significant event engagement.
- Equip SDRs with context-rich engagement tools by automatically generating detailed engagement briefs within sales enablement platforms (Seismic, Highspot), summarizing lead interactions and recommending explicit follow-up actions.

Moments created:

An SDR follows up a high-value digital signal (multiple pricing page views) with a personalized phone call or face-to-face meeting explicitly referencing the buyer's recent online interactions and interests.

05 Quarterly orchestration feedback loops

- Regularly review and optimize cross-functional performance by conducting structured quarterly meetings leveraging AI-driven dashboards (Tableau AI Insights, Salesforce Einstein Analytics) to assess buyer engagement, pipeline performance, and cross-functional execution effectiveness.
- Continuously adjust and refine buyer journeys by holding monthly optimization workshops involving marketing, sales, and operations teams, explicitly refining signals, segments, content strategies, and outreach based on real-time performance insights.

Moments created:

A cross-functional team meeting explicitly identifies that buyer segments engaging digitally and then attending face-to-face events show higher conversion rates, prompting clear adjustments in future event planning and digital nurture strategies.



Metrics and benchmarks

Measure your integrated omnichannel success with these recommended metrics and benchmarks:

Metric	Description	Goal
Content-to-pipeline conversion	Conversion of content engagement to qualified pipeline opportunities	20-30%
Buyer engagement depth	Number of meaningful interactions per lead	5-8 interactions
SDR follow-up effectiveness	Positive response rate following SDR outreach	30-40%
Pipeline velocity	Improvement in lead progression through the pipeline	15-25% improvement

Example

Company ABC implemented a fully orchestrated omnichannel strategy by integrating data from Marketo (MAP) and Salesforce (CRM) across stalled nurture streams (Play 1), event follow-ups (Play 2), signal-driven sales activation (Play 3), and coordinated GTM launches (Play 4). They segmented their audience dynamically based on real-time behavioral signals and personalized content sequences for each stage of the buyer journey. Leveraging detailed engagement briefs generated automatically in Salesforce, their SDRs executed timely and relevant follow-ups.

Regular orchestration meetings used real-time dashboards (Tableau, Power BI) to refine buyer signals, optimize content strategies, and coordinate cross-channel execution. This unified operational approach resulted in significant improvements in lead quality and a 47% increase in marketing-influenced revenue within just two quarters, demonstrating accelerated pipeline velocity and enhanced marketing efficiency.



AI considerations for omnichannel experiences

This section provides a high-level overview of how artificial intelligence can enhance omnichannel effectiveness, improve buyer experiences, and increase marketing efficiency. Each capability highlighted here connects to the Plays in this Playbook where it adds the most value.

For detailed frameworks, tools, and step-by-step guidance on applying AI to your omnichannel strategy, download the [AI Supplemental Guide for Omnichannel Experiences](#).

01. AI-driven personalization and conversational interactions

AI-powered personalization uses real-time buyer signals to deliver dynamic, relevant content at scale. Conversational AI enables interactive, human-like digital experiences, increasing buyer engagement and satisfaction.

Relevance to execution plays:

- **Play 01:** Enhance personalized nurture streams based on real-time behavioral signals.
- **Play 02:** Deliver interactive event follow-ups and conversational engagements post-event.
- **Play 03:** Equip sales with real-time conversational insights from chat interactions.
- **Play 05:** Deliver dynamic personalization across the entire integrated omnichannel experience.



02. Platform integration & technical considerations

Effective omnichannel execution demands seamless integration of data, CRM, AI-driven marketing platforms, and analytics tools. Integrating these platforms ensures consistent, coordinated, and highly personalized interactions.

Relevance to execution plays:

- **Play 03:** Enable real-time signal delivery to sales for effective follow-up.
- **Play 04:** Coordinate product launches with integrated marketing and sales platforms.
- **Play 05:** Ensure data-driven insights flow seamlessly between marketing, sales, and operations, driving consistent buyer engagement.

03. Original and creative AI-driven innovation

Generative AI creates original, personalized content at scale, dynamic videos, interactive tools, and immersive experiences that stand out in crowded markets and boost buyer engagement.

Relevance to execution plays:

- **Play 02:** Generate interactive, immersive post-event follow-up experiences.
- **Play 04:** Launch innovative GTM content and experiences to differentiate products.
- **Play 05:** Continuously innovate with personalized, interactive, and memorable omnichannel interactions.

04. Crisis scenario management

AI-driven tools enable rapid detection, adaptive communication, and proactive management of crises, preserving trust, engagement, and continuity across the buyer journey.

Relevance to execution plays:

- **Play 02:** Quickly recalibrate messaging during or following disrupted events.
- **Play 04:** Proactively manage disruptions during GTM product launches.
- **Play 05:** Maintain consistent omnichannel messaging and interactions during crises.

Need detailed AI frameworks, tools, and resources?

The Omnichannel Experience Playbook gives you the framework. The AI Supplemental Guide for Omnichannel Experiences shows you how to layer AI into each Play. Inside, you'll find detailed frameworks, tools, and resources for applying AI to personalization, platform integration, creative differentiation, and crisis response.

Download the AI Supplemental Guide to extend the value of this Playbook and turn your omnichannel strategy into an AI-enabled execution plan.



Closing guidance: Turning omnichannel insights into action

The changing buyer journey and new expectations require practical and immediate action. Your expanded role as a marketing leader, now evolving toward the Chief Market Officer, demands orchestrated omnichannel experiences driven by strategic use of AI. This playbook empowers you with actionable guidance for recalibrating your go-to-market approach:

Invest in buyer intelligence

Audit your current data and systems to identify gaps. Prioritize integrating platforms that deliver real-time insights for personalized buyer engagement.

Integrate AI strategically

Leverage the AI capabilities identified in this playbook to enhance buyer personalization, content creation, and team collaboration. Start with clear, achievable use cases.

Execute connected plays

Implement each play, measuring success with realistic benchmarks. Continuously optimize based on these performance insights.

Align teams and processes

Define explicit roles and responsibilities across your marketing, sales, and operations teams. Establish clear communication and regular feedback loops to maintain alignment.

Share success and scale

Regularly communicate successful strategies and insights with your peers and internal stakeholders. Encourage a culture of continuous improvement and learning.



This playbook provides practical frameworks, clear benchmarks, and actionable insights. Now is the time to lead your organization toward orchestrated omnichannel success. Leverage the insights provided here to drive differentiation, growth, and impactful buyer experiences.



Ready to lead your omnichannel transformation?

If you're facing challenges in recalibrating your GTM strategy or seeking clear, actionable insights to guide your next move, IDC is here to help. Leverage our trusted expertise, deep buyer insights, and strategic guidance to illuminate your path forward.

Contact IDC today to navigate your next step →

