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# The Omnichannel Client Playbook

Talk to customers where they are — one inbox, AI responders, nothing dropped.

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*Your customers don't think in "channels." They think "I'll just text them," or "I'll message the Facebook page," or "I'll call." The businesses that win are the ones that show up wherever the customer chose to reach out — instantly, with full context, and without anything falling through the cracks. This is the playbook for communicating with clients the way they actually want to.*

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## Meet customers where they already are

A customer who texts doesn't want an email back. A customer who DMs your Instagram doesn't want to be told to "call during business hours." The channel they chose is a signal — meet them there or lose them to the business that does.

The problem is that most businesses scatter those conversations across a personal cell, a Facebook inbox nobody checks, a website chat that emails someone, and a voicemail box. Each channel is a separate island, and leads drown in the gaps between them.

**9 in 10**

customers want to message a business, not just call or email

**Minutes**

how long a texted customer expects to wait — not hours

**1 thread**

what the customer experiences — even across 4 channels

Omnichannel isn't "be on every platform." It's "every conversation, wherever it starts, lands in one place and gets handled like it matters."

## CHAPTER 02

# The one-inbox principle

The foundation is a single inbox that pulls in every channel — calls, SMS, web chat, Facebook and Instagram messages, Google Business messages, WhatsApp, email — into one threaded view per customer.

When everything lands in one place:

- Nobody asks "did someone get back to them?" — the status is visible.
- A teammate can pick up a conversation another started, with the whole history in front of them.
- The customer gets one continuous relationship, not five disconnected ones.
- Nothing sits unseen in a channel no one monitors.

This is the difference between a business that *feels* responsive and one that quietly leaks leads between apps.

## CHAPTER 03

# AI responders that answer instantly — and know when to hand off

A human can't watch every channel at 9pm on a Sunday. An AI responder can — and the moment a message arrives, it replies in seconds, answers the common questions (hours, pricing ranges, "do you service my area?"), and either books the next step or hands a warm, qualified conversation to a person.

Done right, an AI responder:

- **Discloses what it is** — no pretending to be human.
- **Answers from your real information** — never invents prices or promises.
- **Hands off cleanly** the moment the conversation needs a person.
- **Respects consent (CASL)** — automated messages still follow the rules.

The goal isn't to replace your team. It's to make sure no customer waits, and your people spend their time on the conversations that need a human.

## From message to action: tasks, routing, and ownership

A reply isn't enough — someone has to *do* something. A connected system turns conversations into action automatically:

**1 Capture & tag.** Every inbound message creates or updates the customer's record and tags what they need.

**2 Route to the right person.** Sales goes to sales, service to service, the VIP to the owner — by skill, location, or availability.

**3 Create the task.** A follow-up, a callback, a quote — assigned with a due time so it can't be forgotten.

**4 Escalate if it stalls.** No response in X hours? It re-routes or pings a manager. Nothing dies in someone's personal inbox.

Routing is what makes a multi-person team feel like one responsive business instead of a game of telephone.

## AI scheduling: turn "let's find a time" into a booked slot

The back-and-forth of booking — "what works for you?" / "how about Tuesday?" / "actually..." — is where momentum dies. AI scheduling collapses it: the assistant offers real open times from your connected calendar, books the appointment, sends the confirmation and reminders, and handles reschedules — inside the same conversation, on the customer's channel.

A booked appointment beats a "we'll be in touch" every time. The system should always be driving toward the next concrete step.

## One client record: merged portfolios, instant recall

The quiet superpower is a single, complete record for every customer — their whole history in one place, no matter how many people touched it or which channel it came through.

That means:

- **Merged contacts.** The person who called, texted, and filled out a form is *one* record, not three duplicates. Conversations, quotes, appointments, and notes all live together.
- **Instant recall of docs and conversations.** A signed agreement, the photos they sent, what they were promised last month — searchable in seconds, attached to the customer.
- **Anyone can help.** Because the context lives with the customer (not in one employee's head or phone), whoever picks up the conversation can serve them well. New staff, a covering teammate, the owner on a Saturday — same full picture.

This is what turns "you'll have to talk to the person who handled it" into "I can see exactly what's going on — let's sort it out."

## CHAPTER 07

# What good looks like

A business communicating the right way can say all of these:

- Every channel a customer might use lands in one inbox.
- Every message gets an instant first response, day or night.
- Conversations become tasks, routed to an owner with a due time.
- Booking happens in the conversation, not over days of tag.
- Every customer is one merged record with their full history, docs, and chats.
- Any team member can pick up any conversation and help.

## CHAPTER 08

# Your next step

If your conversations are scattered across phones, apps, and inboxes — and you've felt the cost of a dropped message — this is the most fixable problem in your business. Get a free 15-minute walkthrough: we'll map your channels, show you the one-inbox setup, and where AI responders and routing would catch what you're missing today.

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# The Omnichannel Client Playbook — your move.

Get a free 15-minute communication-systems walkthrough at  
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