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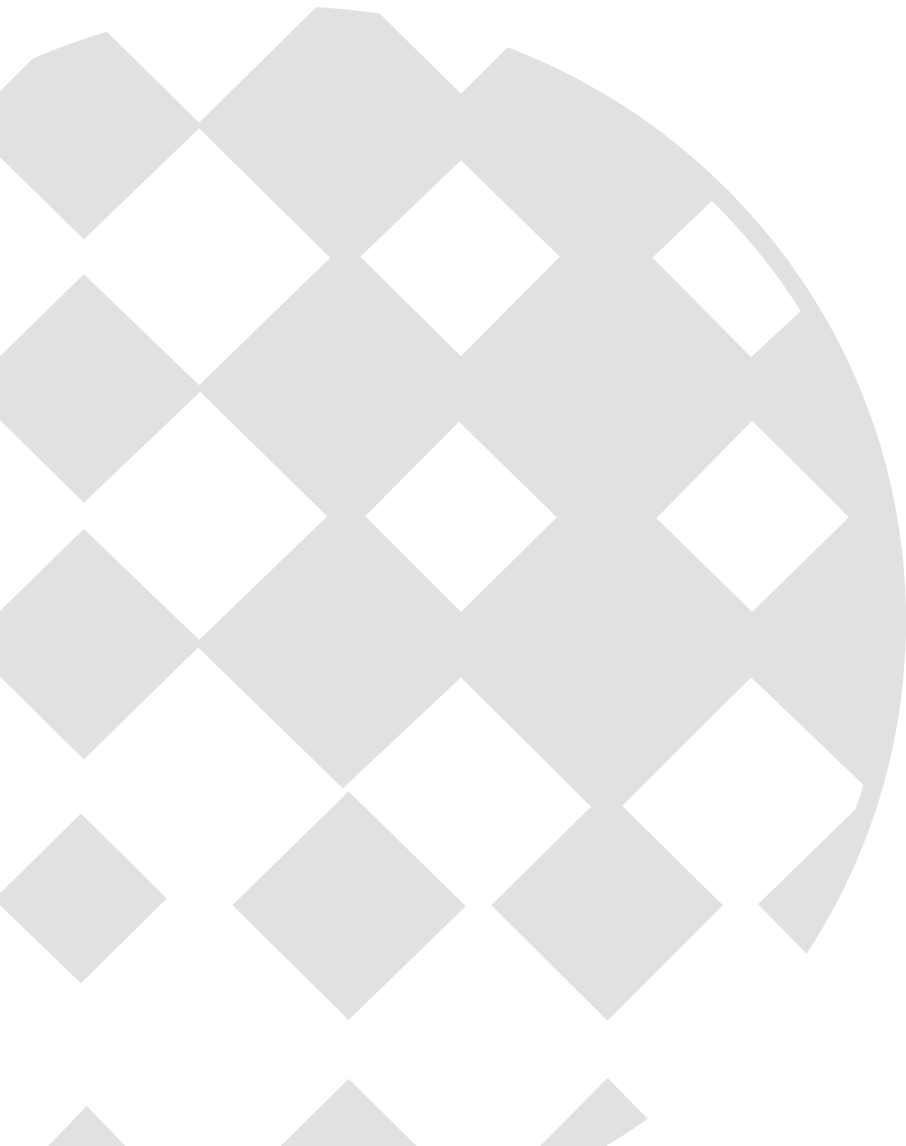
Optimize Your Customer Engagement with Customer Communications Management (CCM)

Overview

Customers engage with their vendors through more channels than ever before. And, customer preferences for communication channels are rapidly changing — including wide adoption of chat, email and online communities and support forums. This is not exclusive to the younger population of consumers — there's disruption and change across all ages and demographics. According to Gartner Research1, an estimated 70% of customer communications will be digital, contextualized and consumed on demand via multiple channels, including the Web, mobile devices and social media by 2017.
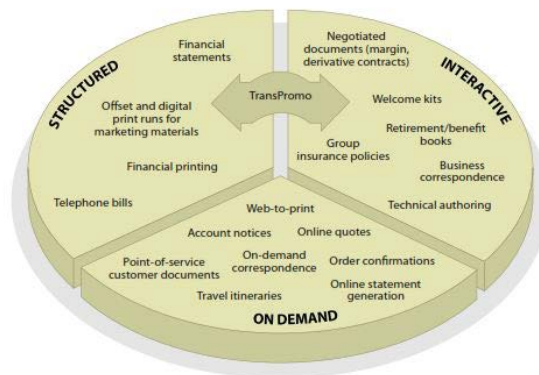
Source: Forrester Research, Inc.

As a result, it's more important than ever for companies to understand their customers' communication channel preferences and to effectively manage communication across all desired touch points. This also means companies must look to adopt a technology platform, such as a customer communications management (CCM) solution that provides agility and flexibility to meet customer communication demands today and in the future.

Customer communications management enables organizations to more effectively create, personalize and deliver communications to any output medium — and throughout the customer lifecycle, including marketing and lead generation, new product adoption, purchase transactions, support and customer service inquiries, renewal notifications and bill and payment notifications.

CCM solutions help improve the end-to-end customer experience and are an ideal approach for organizations looking to streamline and integrate their customer communications. A successful CCM implementation empowers the business to engage and manage communication with their customers across different channels and with minimal effort.

Once an organization makes the decision to move forward with their CCM initiative, careful review should be done to ensure the right vendor solution is selected. This buyer's guide is designed to help organizations navigate the requirements to make the right selection when purchasing and implementing a CCM solution.

To help you navigate your CCM solution analysis, this guide details seven, core requirements and provides an evaluation checklist template to help you make the right choice:

1. Improves Customer Communications

2. Readily Customize Communications

3. Enables Full Control of All Customer Communications

4. Supports Passive and Active Multi-Channeling

5. Supports Compliance with Communication Profiles

6. Empowers Personalized Communication

7. Provides Single, Integrated Platform for All Document Processes

Improves Customer Communications

At the heart of your CCM initiative is the goal to optimize your customers' experience. Improving communication represents an important part of your customer engagement that you can actually manage and plan. Too often, a company's communications are disjointed and don't engage the customer in a meaningful way. Your CCM solution should help you improve communications by letting you consistently speak to your customers as individuals across all channels and in a single voice.

To ensure your CCM solution maximizes your potential for improved communication, it should let you:

◆ Reach your customers with documents that have the content, tone-of-voice, brand image and personalization your customers need — on the channels of their choice.

◆ Leverage templates for letters, emails, PDF files, fax and text messages and other document or electronic formats.

◆ Integrate into your business processes to make production of customer communications more reliable and more consistent, including integration with SharePoint, Office 365, Microsoft Dynamics and SAP or your bespoke business application.

Readily Customize Communications

Organizations need the ability to respond quickly to market developments and continuously changing customer preferences and needs. And, they can increase customer loyalty by making customers feel more valued and appreciated with communications that are better tailored to specific customer audiences.

A CCM solution's capabilities to customize communications are an essential enabler in this context. Likewise, ownership by business users makes this effort more agile and fluid, so it's important that the vendor

approaches customer communications as a business process that can be owned and managed by your business managers. This includes features like account access for your business users through role-based authorization and the ability to create communication rules that make sense to your business.

When it comes to a solution's ability to readily customize communications, the adage applies, "Simple things should be simple. Complex things should be possible." A viable solution should provide the ability to:

- Tailor your customer communications to customers' preferences and strengthen customer relationships by providing relevant and personalized information.

- Enable business users to own the templates, content and the communication profiles that drive communication rules, such as channel selection, bundling and postal optimization rules.

- Implement multi-branding options with a single template that supports all of your business brands.

- Provides usage to your line of business managers through its role-based authorization capabilities.

- Define communication rules using concepts and terminology that make sense to your business.

Enables Full Control of All Customer Communications

Improving the operations around customer communications will go a long way to simplifying its future management. A CCM solution can help in this effort by driving all of your customer communications through a single platform. With a centralized communication repository, managing and optimizing your communications becomes an easy, streamlined effort.

For example, today your employees might handle ad-hoc correspondence using their word processor to write a letter or a document without using an adequate or sanctioned corporate template. With a CCM solution, your employees get a framework to manage this, which can include an "empty letter" template and also reference standard text block libraries. This makes them more efficient and ensures automatic compliance with your company standards, such as using the approved disclaimer, correct copy blocks and corporate logo.

Some capabilities to look for that maximize your management and control of customer communications include:

- Integration with tools that provide dashboards and analytics.

- Integration with systems of record, such as CRM systems and SAP.

- Central management of text blocks, version control and audit trail.

- Role-based authorization and built-in approval workflow for templates.

Supports Passive and Active Multi-Channeling

A strong CCM solution should support a rich variety of output possibilities to ensure content can be sent the way your customers want to receive it. Your clients' communication preferences should determine the format in which they receive their documents.

In addition, your CCM solution should support both passive and active multi-channeling. With passive multi-channeling, your users can repurpose a document for different delivery channels without causing any variations in the output. Active multi-channeling generates alternative content and formats for different delivery channels. For example, active multi-channeling allows you to send an email that includes a personalized link to a portal and requires the recipient to register to log into the portal for the printable version of the communication. Another example of active multi-channeling is a print communication that includes a brochure, and for the digital version of the same correspondence, the email includes a link to the brochure.

Your CCM solution's channel output capabilities should:

◆ Provide personalized and relevant communication delivery through traditional print, fax, email, SMS and portal publication.

◆ Support both passive and active multi-channel capabilities.

◆ Integrate with e-signature solutions to enable automatic electronic signatures across all output channels.

Supports Compliance with Communication Profiles

With rules and regulations tightening in a range of areas, it is increasingly important for companies to stay fully compliant. This concerns both government-imposed rules and companies' internal rules. Your CCM solution should empower your business to manage document generation with greater accuracy to reduce the risk of unwittingly creating rule violations.

To strengthen your document compliance controls, your CCM solution should:

◆ Facilitate consistent, straightforward and secure generation of business-critical documents that comply with all current rules and regulations.

◆ Provide internal and external communication profiles that drive rules and preferences from all stakeholders, including internal users, regulators, customers and channel partners.

◆ Enable you to authorize users to edit specific parts of a document to ensure that content elements of critical documents are handled by qualified staff.

Empowers Personalized Communication

Not all customers are alike, and nothing makes a customer feel more unappreciated than receiving a communication that ignores a conversation they already had with somebody or clearly shows the vendor doesn't know them — like what product they own or how long they've been a customer.

The right CCM solution should empower you to deliver more meaningful and engaging content to your customers based on a variety of segmentation options, including client information and profiles that help drive more targeted content selection. In addition, it should allow users to add personal information that is not available in a system or record and enable your users to refer to verbal exchanges of information that are not tracked in a system.

To support your efforts in generating more personalized communication, look for the following capabilities:

- Standard documents that can be personalized within the framework of the template.

- Users can provide additional or missing information that is not available in a system of record.

- Text blocks that can be selected from a text block library defined within the template.

- Users can manually change text blocks to refer to previous communications, whether they were in writing or verbal.

- Access to all data from business applications and legacy systems that includes personal information about the customer for creating documents.

- Smart use of data to compose documents tailored to the personal situation of the customer.

- Composed documents that can be edited in the word processor of your choice for final personalization, when needed.

- Integrates with smart process applications (SPA) to provide a controlled environment with checks-and-balances to manage the personalization for all case management, contract management and other types of negotiated documents.

Provides Single, Integrated Platform for All Document Processes

For the utmost in efficiency, your CCM solution should use a single engine and content repository for your document processes — from simple renewals to complex, personalized quotations. And, the solution should track and log all steps of document creation to provide your organization with full management information, traceability and control of your customer communications. With this centralized engine and database, you can also schedule high-volume, batch requests for email and print jobs.

Some key features to look for in your CCM's integrated platform include:

◆ Web-based wizards for document composition that let your users select text and content elements and enter additional data not available from an application.

◆ Server-based communications engine that produces documents based on application data, on-demand and in real-time, without requiring user interaction.

◆ High-volume batch job management with logging that provides users a full audit trail, traceability and control.

◆ Database details where partial and failed jobs can easily be identified and restarted.

Conclusion

CCM solutions hold the promise of being the best technology enabler for streamlining customer communications and optimizing customer experience with relevant and meaningful content, at the right time, through the preferred channel for every customer. Place your customers' needs at the center of your CCM technology acquisition project. This will ensure your selection criteria provide the best results to drive your customer acquisition and retention.

In addition, your CCM solution of choice should be geared to enable operational efficiency and reduce costs, which are best achieved through time saving features like automation and actionable analytics – as well as management capabilities that integrate with your existing business applications and processes.

Finally, when evaluating a CCM solution, make sure the vendor approaches customer communications as a business process controllable by your business managers. Ensure its delegation management provides usage to your line of business managers and that communication rules can be defined using concepts and terminology that make sense to your business. In the end, the right solution should let your business users determine which communications need to be generated for which recipients and that the solution can manage that process end-to-end.

CCM Evaluation Checklist

Below is an evaluation checklist to use in your vendor selection process. Choosing a CCM vendor with strong capabilities in these key areas will provide your organization with a strong technology resource to optimize your customer communications that improves your overall customer experience.

	Kofax	Vendor 2
Improves Customers Communications		
Reach your customers in time with documents that have the content, tone-of-voice, brand image and personalization your customers need — on the channels of their choice.	Yes	
Leverage templates for letters, emails, PDF files, fax and text messages and other document or electronic formats.	Yes	
Integrate into your business processes to make production of customer communications more reliable and more consistent, including integration with SharePoint, Office 365, Microsoft Dynamics and SAP or your bespoke business application.	Yes	
Readily Customize Communications		
Tailor your customer communications to customers' preferences and strengthen customer relationships by providing relevant and personalized information.	Yes	
Enable business users to own the templates, content and the communication profiles that drive communication rules, such as channel selection, bundling and postal optimization rules.	Yes	
Implement multi-branding options with a single template that supports all of your business brands.	Yes	
Provides usage to your line of business managers through its role-based authorization capabilities.	Yes	
Define communication rules using concepts and terminology that make sense to your business.	Yes	
Enables Full Control of All Communications		
Integration with tools that provide dashboards and analytics.	Yes	
Integration with systems of record, such as CRM systems and SAP.	Yes	
Central management of text blocks, version control and audit trail.	Yes	
Role-based authorization and built-in approval workflow for templates.	Yes	
Supports Passive and Active Multi-Channeling		
Provide personalized and relevant communication delivery through traditional print, fax, email, SMS and portal publication.	Yes	
Support both passive and active multi-channel capabilities.	Yes	
Integrate with e-signature solutions to enable automatic electronic signatures across all output channels.	Yes	
Supports Compliance with Communication Profiles		
Facilitate consistent, straightforward and secure generation of business-critical documents that comply with all current rules and regulations.	Yes	
Provide internal and external communication profiles that drive rules and preferences from all stakeholders, including internal users, regulators, customers and channel partners.	Yes	
Enable you to authorize users to edit specific parts of a document to ensure that content elements of critical documents are handled by qualified staff.	Yes	
Empowers Personalized Communication		
Standard documents that can be personalized within the framework of the template.	Yes	
Users can provide additional or missing information that is not available in a system of record.	Yes	
Text blocks that can be selected from a text block library defined within the template.	Yes	
Users can manually change text blocks to refer to previous communications, whether they were in writing or verbal.	Yes	
Access to all data from business applications and legacy systems that includes personal information about the customer for creating documents.	Yes	
Smart use of data to compose documents tailored to the personal situation of the customer.	Yes	
Composed documents that can be edited in the word processor of your choice for final personalization, when needed.	Yes	
Integrates with smart process applications (SPA) to provide a controlled environment with checks-and-balances to manage the personalization for all case management, contract management and other types of negotiated documents.	Yes	
Provides Single, Integrated Platform for All Document Processes		
Web-based wizards for document composition that let your users select text and content elements and enter additional data not available from an application.	Yes	
Server-based communications engine that produces documents based on application data, on-demand and in real-time, without requiring user interaction.	Yes	
High-volume batch job management with logging that provides users a full audit trail, traceability and control.	Yes	
Database details where partial and failed jobs can easily be identified and restarted.	Yes	

Kofax Customer Communications Manager

Kofax Customer Communications Manager™ empowers the business to engage and communicate with their customers across different channels, with minimal IT effort. Kofax Customer Communications Manager does this by generating relevant and personal communication and delivers it through e-mail, print, portal and other channels. Documents can be generated fully automated or through an interactive process.

Kofax Customer Communications Manager is used in more than 30 countries worldwide and by more than 250,000 users. Documents can be used and maintained by business managers, alleviating resource demands on IT. The flexible, reliable software creates your documents, is easy to use and integrate and empowers your people to communicate.

To learn more about Kofax Customer Communications Manager, visit:

www.kofax.com/products/customer-communications-management