

EXECUTIVE BRIEF

OpenText Exstream for Salesforce

Exceed expectations at every step of the customer journey. Improve customer satisfaction, maintain brand consistency and experience a quick return on investment.



Eliminate errors

with sophisticated predesigned templates



Accelerate

productivity with automated document generation



Increase customer

satisfaction with personalized communications

The digital marketplace has expanded opportunities—along with customer expectations. Today's customers expect personalized journeys that clearly address their needs.

OpenText™ Exstream™ for Salesforce® is a document generation solution that helps organizations deliver consistent, compliant, communications—anytime and anywhere—to create remarkable customer experiences. Exstream for Salesforce streamlines, automates and integrates the customer experience. Creating customer correspondence directly within their CRM system, users can access, revise, repurpose and personalize content faster and with less effort.

Uniquely designed to connect to and beyond CRM systems, OpenText™ Exstream™ solutions offer a wider, more comprehensive solution for the entire enterprise. Exstream enables organizations to communicate critical business information clearly, quickly and consistently across all channels. Designed for omnichannel customer communications management, Exstream leverages the data and content that exists within an organization to deliver highly-personalized, engaging customer experiences on the customer's preferred digital and print channels, screen sizes and devices.

Exstream for Salesforce speeds document creation and increases user productivity, while eliminating virtually all risk to the brand and business.

By the numbers

382% average return on investment

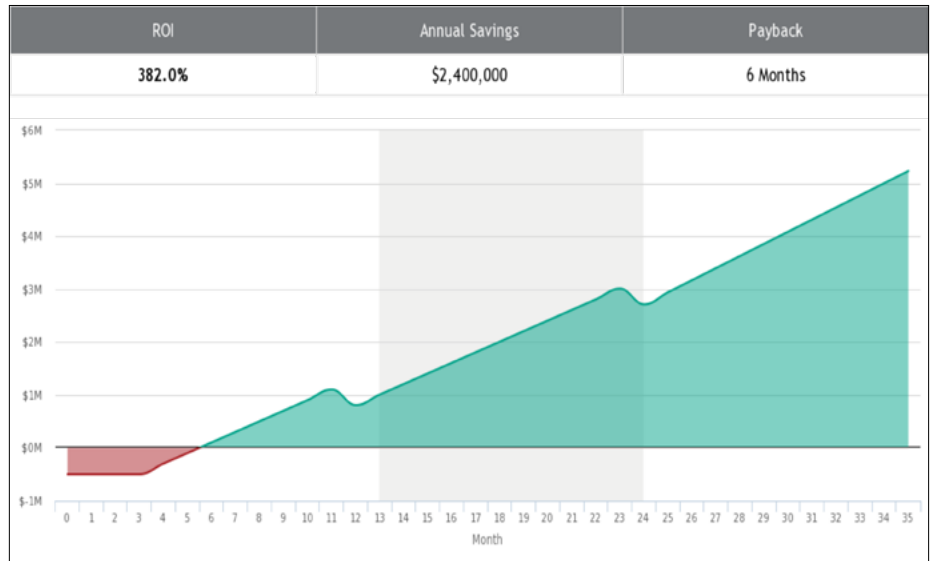
Customers experience a return on investment of more than 382 percent on average.

\$2.4 million+ average savings

Customers save more than \$2.4 million in one year.

6-month average payback

Customers realize payback within six months of their investment.



For a personalized value assessment, contact us at vmo@opentext.com

Benefits

Personalized experiences

Tailor communications, including quotes, proposals, contracts and service documents for a personalized experience that boosts customer engagement, drives revenue and improves brand loyalty and brand consistency.

Automated document generation

Automate and re-purpose dynamic templates and documents to save time, money and the need for technical resources.

Multichannel communications

Reach out to customers through their preferred channel, including smartphones, social, email, SMS and more, to help increase business metrics, such as click-through-rates (CTRs).

Risk management

Respond to regulatory changes and mandates quickly with the flexibility of editing content and templates, as well as adhering to accessibility requirements

Predesigned templates

Leverage the template library for quotes, contracts, proposals, service documents, general customer correspondence and more and reduce time spent developing complex document templates.

Flexible deployment options

Download from the Salesforce AppExchange and operate in either Software as a Service (SaaS) mode, managed and run by OpenText in a public cloud, or Enabler mode, allowing Exstream users to connect seamlessly to the platform wherever it is installed.

Easy accessibility and reuse

Access created items later in Salesforce, as well as inside OpenText™ Extended ECM, making them accessible to non-Salesforce users and avoiding extra Salesforce storage costs.

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Whether producing a single customer service email or millions of personalized sales letters, Exstream for Salesforce helps rapidly synthesize relevant business data and content into compelling written communications, from within your familiar CRM environment. As a Content Services leader, OpenText continually adds innovative applications for the Salesforce AppExchange to manage digital assets, personalize communications, ease customer contracts and more, to ensure compelling customer experiences.



Unum replaces several document generation systems with one solution

Email is an important communication tool for Unum. It used to take three to six minutes to create each manual email.

“We have been able to automate that for 160,000 emails. We are now generating those in seconds, so the return on investment is a huge improvement for our business.”

Rex Price

Former director, Document Management Center of Excellence
Unum

[Read the full Success story](#)



Premium Credit takes advantage of communications to boost marketing

Premium Credit regularly changes its communications for regulatory reasons. The company did not always take advantage of the marketing opportunities of these regular communications due to the cost and complexity of changing templates. With OpenText Exstream, the company now adds marketing messages to its customer communications.

“Now that we can implement changes ourselves, typically in less than an hour, we can truly benefit from being able to keep our customers informed. OpenText Exstream has reduced the cost of template maintenance by 45 percent and has made us much more agile.”

Phil Rees

Former Multichannel Platform Leader
Premium Credit Limited

[Read the full Success story](#)

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit: [opentext.com](https://www.opentext.com).

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