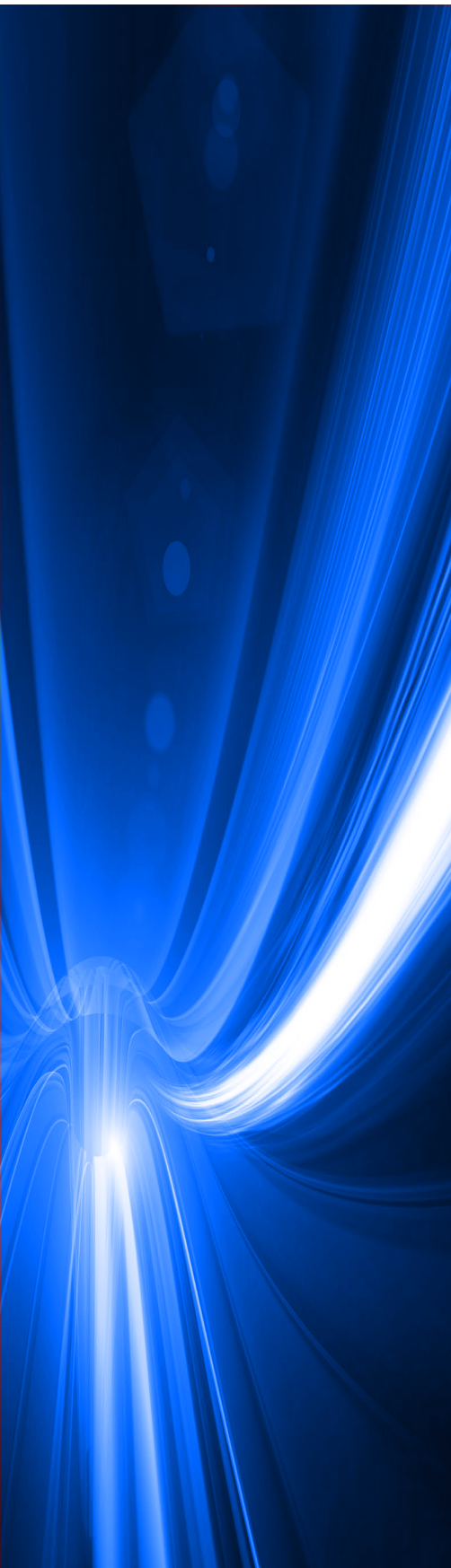


Preparing for the shift from CCM to CXM

Selecting OpenText to help power digital transformation





The pandemic and related disruptions have accelerated digital transformation across industries and shifted customer expectations, as 73 percent changed the way they shopped.¹ What was once good enough isn't cutting it anymore: 65 percent of consumers agree that most companies they do business with need to improve the customer experience (CX) they provide, up from 35 percent in 2019 and 59 percent in 2021.²

This implies that current solutions, processes and tactics are not able to bridge the gap between the CX that companies provide and what customers expect. Higher CX expectations and changes in customer behavior are here to stay, so companies must adapt.

Traditional customer communications management (CCM) is quickly evolving into customer experience management (CXM). Companies are expanding their digital interactions with consumers to meet evolving demand for personalized, interactive communications that transcend channel.

Legacy solutions can't deliver the personalized future of experience

Many businesses have disparate customer communications and experience systems across different departments that don't work together, making it difficult to understand the entire customer journey and deliver a connected experience. Legacy solutions may serve departmental needs, but struggle to scale to meet the needs of the entire enterprise. For example, some vendors rely on a third-party bolt-on approach to deliver the full picture.

Solving for new business needs in the experience economy—relevance, customer intimacy, responsiveness, intelligence, consistency and efficiency—requires a trusted partner who can deliver the full package.

Preparing for transformation

Moving away from legacy applications is a significant decision that requires a strategic plan to manage potential risks, address daily changes and build a stronger path forward.

This guide will prepare organizations for transformation by helping them:

- **Understand the impact on business and employees.**
- **Identify key priorities for developing a personalized communications modernization strategy.**
- **Plan for key activities that will support a successful transition.**

¹ Blake Morgan, Why Experience Matters More Than Ever to Customers. (2022)

² Broadridge, 2022 CX and Communications Insights. (2022)

Why modernize now?

Many teams, such as IT, may have grown used to managing existing applications and the status quo. However, the status quo won't address the changing needs of the experience economy. Prior technology investments may not pay off or resolve technical debt.

Moving to a modern infrastructure to meet today's evolving experience economy needs and building a strong foundation for business growth can provide strong ROE (return on experience) and ROI (return on investment) while resolving technical debt.

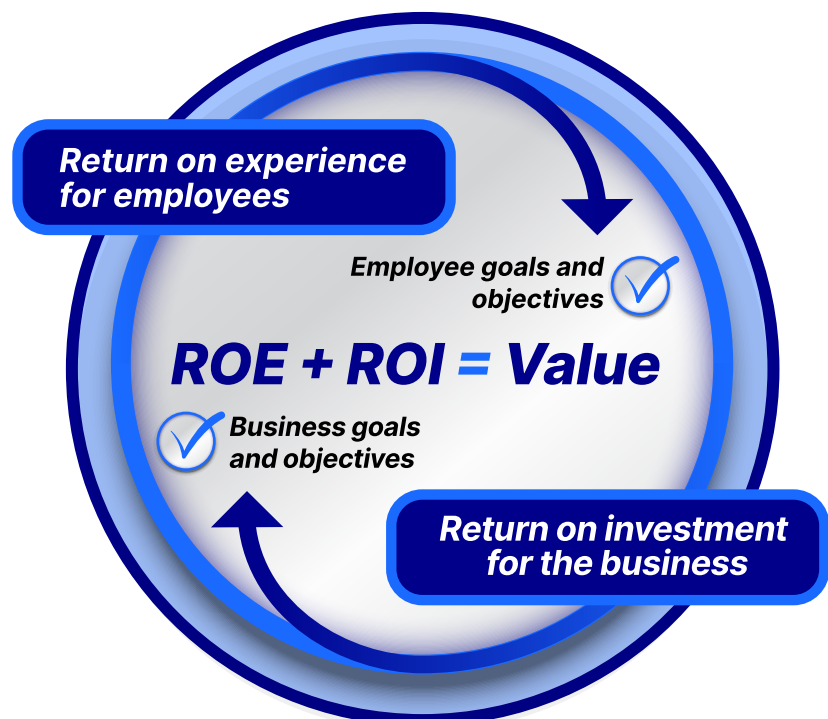
Six signs it is time to modernize

If any of the following scenarios exist for your organization, that should signal urgency to modernize:

1. **Communications opportunities or challenges the business is unable to address with existing applications.**
2. **Difficulty understanding customers' priorities, values and emotions as well as mining those behavior insights to improve conversions.**
3. **Legacy applications are causing lost productivity.**
4. **Amending existing applications is too difficult or costly.**
5. **Modern solutions seem likely to simplify complex business processes.**
6. **The organization is considering cloud-based solutions now or in the future.**

Getting the most from these new investments

Organizations should focus on the ROE and not just the ROI when purchasing new technologies. Improving the daily employee experience can impact ROI by reducing barriers and increasing productivity.





The pain points employees face while performing daily tasks impact productivity, motivation and overall experience. As legacy applications present increasing challenges, daily pain points become a source of frustration and friction.

If legacy applications are deeply integrated across the organization and within multiple departmental processes, negative experiences are amplified. It is crucial to get ahead of these issues and start thinking about the impact removing these challenges will have on staff, their line-of-business processes and daily tasks.

Transitioning to a modern platform for the future

OpenText offers a single vendor communications and customer experience platform with native data and insight capabilities. Scalable and built for the enterprise, OpenText offers a [composable, omnichannel CXM platform](#) to deliver personalized, relevant and consistent communications across all channels and touchpoints.

[OpenText™ Experience Cloud](#) provides native customer data processing capabilities to optimize relevant personalization, value and timing for each customer. Through voice of the customer (VOC) capabilities, it delivers customer intimacy with empathy and understanding for customer priorities, values, behaviors and emotions. Responsiveness to customers and the event-driven nature of Experience Cloud helps maximize spend and reduce latency, delays and lost time.

By collecting communications events in near real time and generating insights for business users, Experience Cloud leverages intelligence to gain insights on engagement behaviors, optimizing next best offer, action and channel. Organizations can deliver consistency across all communications channels, types and journey stages thanks to a 360-degree view of the customer.

Automation, AI and user augmentation capabilities can maximize user efficiency by optimizing employee experience. No other solution in the marketplace can address the new business needs of the experience economy as comprehensively.

The OpenText approach to accelerated modernization

OpenText has helped many organizations modernize their digital infrastructure, improving total experience, enhancing business processes, boosting productivity and paving the way for future-proof solutions that evolve with the business.

The OpenText Accelerated Modernization Program (AMP) provides a phased approach to prepare for future business needs.



Three-phase approach

PHASE 1 – Assess and deploy

Phase 1 starts with a thorough assessment of current state business and technical needs, objectives and challenges and how technology is being used. OpenText experts then deliver future state business and technical recommendations to address the organization's unique needs with a glimpse of the qualitative and quantitative value OpenText Experience Cloud can provide.

PHASE 2 – Modernize, adopt and manage

OpenText helps build a custom modernization plan based on the value to be derived at every stage. Experts collaborate with an organization's staff to deploy a scalable enterprise solution supported by prescriptive services that accelerate time to value, maximize returns and offset internal resource costs for ongoing administration. OpenText staff will work with administrators to ensure adoption and value through [Success Services](#), [Learning Services](#) and [Managed Services](#).

PHASE 3 – Decommission

Decommissioning legacy applications successfully requires careful planning to minimize risk and disruption. OpenText experts help organizations build a strategy to decommission legacy communication systems. Decommissioning may happen over multiple stages and may require a supporting archiving plan.

Why a phased approach?

OpenText experts work with an organization's staff to understand:

- **Unique business requirements.**
- **How this project will impact multiple areas of business.**
- **How this move fits into strategic initiatives.**

A comprehensive plan based on use cases, pain points, potential impact and benefits, paired with strong business justification, will prepare staff to think big. A methodical approach to each phase ensures alignment with the big picture, delivering an improved digital-first infrastructure that's agile enough to support complex business processes and provide value.



OpenText does not recommend a rip and replace approach.

Why? It's simply not a realistic option due to the costs and risks. A phased approach allows organizations to achieve iterative wins, demonstrating value.

Conducting a value-mapping needs assessment

Each business has unique needs and, therefore, requires a unique execution plan. As a first step, organizations should conduct a value-mapping needs assessment that includes a thorough analysis of its current business technology needs and the value that an optimized future state can provide. This is referred to as a future state value map.

Things to consider include:

- What business objectives are most critical?
- What are the priority use cases for customer communications management?
- How is current technology addressing these business needs and use cases? In what business processes and use cases is the current technology integrated?
- How are outdated systems being used? In which departments?
- What type of documents are managed and stored within aging infrastructure?
- How many years has the business been using legacy technology and when was the last upgrade?
- What is the total number of users on legacy applications?
- What legacy functionality does the business rely on?
- What functionality, if any, is missing from legacy technology?
- How satisfied are employees with the user experience?

The following are some additional questions to consider with the help of an OpenText expert:

- Does the organization have a plan for moving to the cloud? What is it?
- Will a full or partial migration of content and data from existing systems be necessary?
- What is the preferred timeline to modernize the legacy system?
- Will any integrations or customizations be necessary to better enable existing or desired business processes?

TIP Complete an internal assessment with employees

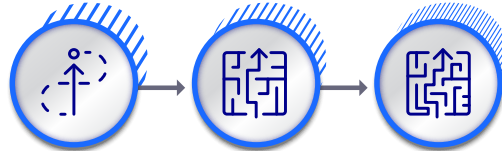
OpenText recommends assessing employee utilization and satisfaction with legacy technology using surveys and focus groups. This will spotlight:

- **Real-life use cases and challenges.**
- **Employee satisfaction and experience with the system.**
- **Areas where improvements will have the greatest impact.**
- **How employees prefer to work to optimize productivity.**

As part of a value mapping assessment, OpenText experts work to better understand the current state of business processes and legacy technology, as well which improvements would have the greatest impact and value.

Planning the path to modernization

Based on the needs assessment, OpenText will help create a proper decommissioning strategy for legacy systems. Decommissioning can be extremely complicated depending on how deeply embedded the system is.

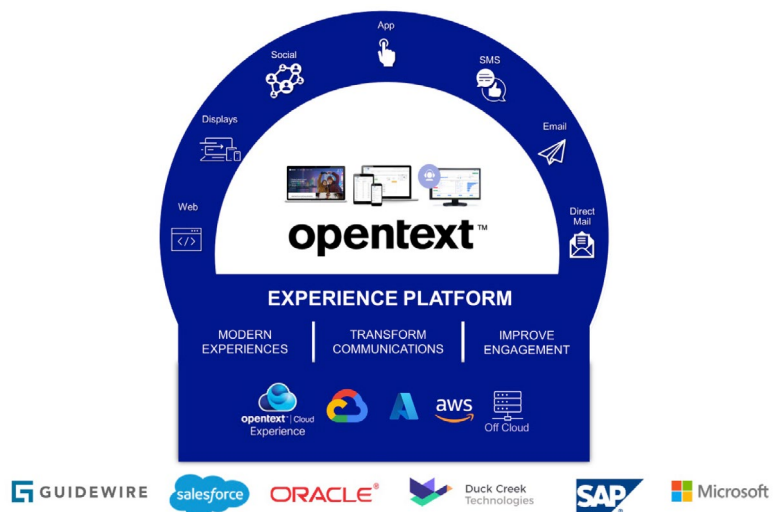


To deliver on post-pandemic expectations, organizations need a scalable customer experience solution. For some organizations, that also means adopting cloud-based solutions and implementing a cloud strategy. For others, it means finding solutions that enable a more flexible path to the cloud with room to transition gradually. Whether organizations already have a cloud strategy, are ready to transition or are just starting to think about the benefits, OpenText can help find the best path to achieving digital agility that:

- Unites information ecosystems.
- Governs information securely.
- Leverages information holistically.

OpenText Experience Cloud integrates experiences, media, communications, messaging and data for customer experience management in one cohesive platform. Enabling organizations to seamlessly personalize experiences and communications, deliver relevant engagement and optimize the customer journey, OpenText helps maximize revenue, improve operations and create customers for life.

Frictionless Experiences



When it comes to modernization, consider the entire business ecosystem and the many complex processes that could be improved for better employee experiences and higher return on investments. Boosting the effectiveness of your existing systems is critical to success. OpenText™ Exstream offers deep integrations with popular applications such as SAP®, SalesForce, Guidewire, Duck Creek, Google Analytics, Temenos, Infor, Facets, OpenText™ Notifications, OpenText™ Media Management, OpenText™ TeamSite™, Explore, OpenText™ Output Server, OpenText™ Documentum™, OpenText™ Core Archive, Archive Center, DocuSign, OpenText™ Core Signature, SparkPost, Exact Target and OneSpan.

Need an on-premises solution?

While cloud-based solutions play a vital role in modernizing complex business processes, some organizations still require on-premises solutions. These organizations often have strict compliance requirements to meet, such as governance and archiving. The OpenText Experience platform is available on premises to accommodate these needs.

Preparing for common challenges

OpenText has worked with many customers to transform from legacy systems, supporting them through their entire transformation journey. Some common challenges to keep in mind include:

- **Highly customized instances of legacy applications that are difficult to dissect.**
- **Regulatory requirements impacting content management and storage.**
- **Administrators of legacy applications that are no longer with the company.**

Addressing potential gaps and risks

There are potential gaps and risks in the planning process and transformation journey that can impact success. Many common gaps and risks tie closely to employee experience, including:

- Lack of a success plan, designated staff owners, critical milestones and KPIs.
- Lack of proper onboarding and change management tactics to support employees as they learn new solutions and embed these tools into daily tasks and departmental business processes.
- Lack of adoption communication and education to ensure the organization understands why these changes are happening, why they are important for the future of the business and how employees will benefit.





It is time to build a long-term strategy with a trusted partner

OpenText experts understand a move like this can be challenging and requires time, resources and planning. They know the risks and challenges and have worked with other customers just like you to navigate the transition from one platform to another.

With technology to support evolution, OpenText is a trusted partner that helps organizations power modern experiences and prepare for the future of business by:

- **Increasing customer lifetime value.**
- **Improving experiences and engagement for customers, employees, partners and users.**
- **Enhancing employee and user performance.**
- **Boosting partner effectiveness.**

OpenText solutions connect customers and employees to the content they need, when and where they need it.

Reimagine what is possible

Build a modernization plan with the help of OpenText experts. Get expert help every step of the way to ensure a successful transformation journey, building a stronger path forward and future-proofing the organization.

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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