

WHITE PAPER

Design communications for superior digital experience

Five best practices to take customer communications to the next level



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Meaningful communications for enduring relationships

Rethinking customer communications with a personalized, digital-first approach can improve customer satisfaction scores.

Whether traditional or digital, communications are the primary customer touchpoint for most organizations. The quality, timeliness and accuracy of those communications have a huge impact on consumer perception. The customer's experience is the single greatest predictor of whether they will return and promote the company or defect to a competitor and malign it.

Competitors are paying attention. According to Forrester, improving the customer experience is a top priority for most companies. Trust is built when customers believe a company understands their point of view and preferences.

At the same time, many companies are faced with the reality that the core systems they have relied on for their key processes for years—including billing and customer care—need to be replaced or will soon require an extensive upgrade to support mobile and digital interactions.

Since companies may already need to update their legacy systems, it is a prime opportunity to create game-changing customer communication touchpoints that attract, acquire and service customers and grow business.

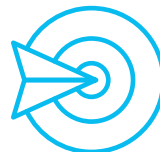
Connect the customer journey to cross-channel communications

Clear and actionable communications are essential to every step of the customer journey. Every interaction—service or self-service—with customers, prospects and business partners contributes to their overall experience and their positive or negative perception of the brand and business, as well as the quality and value of the shared relationship. Communications should be clear, easy to understand and act on and provide the appropriate context for recipients to take action. By engaging customers on their terms and according to their preferences, companies can make the interactions meaningful and the overall customer experience positive and enduring.



Grow

- Personalized offers
- Notices and renewals
- Loyalty programs
- Targeted promotions



Attract

- Targeted campaigns
- 1:1 demand marketing
- New business proposals
- Customized quotes



Service

- Statements and summaries
- Bills and invoices
- Customer correspondence
- Claims and inquiry responses



Acquire

- Welcome kits and ID cards
- Onboarding and enrollment
- Account opening
- Policies and contracts

Real-time welcome emails see 10X higher transaction rates and revenue per email over batched welcome mailings.¹

The customer experience imperative

Many companies are zeroing in on customer experience as both the next battlefield and a key competitive differentiator. Providing a consistent and compelling experience across all interactions, whether physical or virtual, is a business imperative. Mobile and digital devices and technologies are everywhere, amplifying the need to engage and connect with customers.

It is easy to see why. Many players in competitive markets give customers an abundance of choice. As such, customers expect companies to be extremely attentive and responsive to their needs. While meeting consumer expectations can be challenging, the payoff is real. For example:

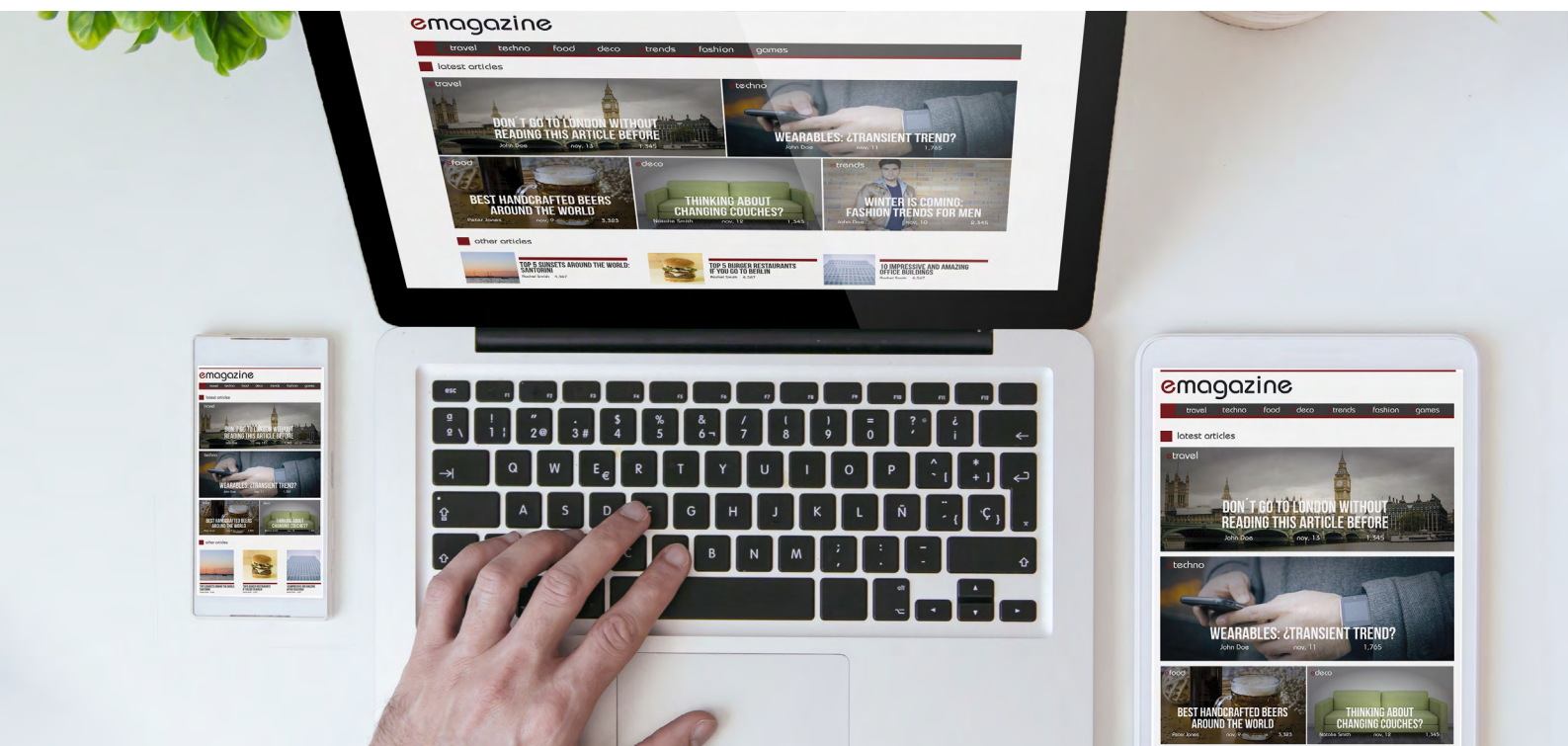
- Real-time welcome emails see 10X higher transaction rates and revenue per email over batched welcome mailings.¹
- Customers spend 20 percent to 40 percent more when companies respond to customer service requests over social media.²

To capitalize on those trends and opportunities, it is critical for companies to move from traditional paper-based documents to engaging conversations across all channels. By sending company communications in the customer's preferred channels and designing with digital in mind, companies can turn communications into a differentiator instead of an obligation.

Companies can make better connections, improve customer satisfaction (measured by Net Promoter Score (NPS) or JD Power ratings) and attract more customers with a single, comprehensive customer communication management (CCM) solution—all while increasing revenue and reducing business costs and risks.

¹ experian.com/assets/marketing-services/reports/welcome-best-practices-guide.pdf.

² statista.com/statistics/269025/worldwide-mobile-app-revenue-forecast/.



“CEOs and CIOs around the world are looking at the customer experience as the next differentiator. Everyone can code stuff, but the experience is what matters.”

Dr. Eric Schaffer
Founder And Ceo
Human Factors International

Top five tips for designing for the experience economy

1. Design for understanding

What do recipients need to understand?

Consumers want communications that are easy to understand. This requires using clear, plain language without industry jargon and legalese. It also means designing the communication from the perspective of the recipient. Where are they most likely to look for key information?

A reputable CCM vendor will have developed best-practice methods for helping organizations design communications that create superior customer experiences.

In government and industries like Healthcare, clear communication is also required by legislation and regulation. For example, in the US, the Plain Writing Act of 2010 requires federal agencies to write “clear government communication that the public can understand and use.”

2. Design to drive action

What do recipients need to do or not do?

If the goal of a communication is for customers to pay a bill, the communication should clearly outline the charges, amount due and how and when to pay. If the goal is for the customer to take advantage of a special offer or sign up for a new service, the communication should provide timely cross-sell messages that are relevant, easy to act on and personalized.

If the goal is to avoid consumer or partner calls to the contact center, the communication should be easy to understand and link to self-service options that address common concerns. If the goal is to encourage calls to generate goodwill and revenue, the communication should provide a prominent phone number. Designing to illicit action is all about understanding cost and revenue drivers and inspiring action in an intentional and purposeful way.

3. Design for digital first, but don't neglect traditional channels

Do recipients have a seamless cross-channel experience?

Interacting with customers via email or a smartphone requires a different approach than a desktop website or printed document. Of course, the physical sizes of the form factors are different, but so are the ways the recipient opens and navigates the communication. For example, digital communications like emails can incorporate links to desired actions, such as paying a bill or enrolling in online account management.

The best practice is to design the layout and content for the smallest form factor first. The limited space helps to pare down messages and desired actions to only the most crucial. Then, content can be added as appropriate. This approach also helps ensure message consistency and maximum reuse of content across channels.

4. Design to align business user profiles with the business process

How are business users involved? Do they own content and messages? Can they help personalize communications for the front office?

Communicating the right message at the right time requires the intervention of business users who have suitable training, knowledge and sophistication. Sending the wrong message at the wrong time can be detrimental to customer satisfaction and business results. Business users in:

- **Marketing and customer care** know and understand current and prospective customers and what they need and want.
- **Legal and compliance** can keep information current and in line with regulations and other requirements and own and control relevant content and messages in communications.
- **Front office departments**, such as marketing, sales and customer care, can easily personalize communications created and delivered as a result of an interaction with a customer or prospect.

Timely, accurate, personalized communications are critical to a positive customer experience.

5. Design customer-centric communications from the inside out and outside in

How can processes and systems of interaction be modernized to deliver on consumer expectations for seamless cross-channel interactions?

To improve the customer experience, companies need to design and deliver actionable communications. They should use clear and concise language and be compliant, accurate and controlled. All this requires synchronizing the right data with CCM software and the business processes that intersect with customer touchpoints.

Many organizations undertake customer journey mapping projects and make the necessary investments in modernizing key business systems and processes. This requires organizational commitment and resources from the C-suite.

Employees can advocate for updating key systems and processes in a thoughtful way to ensure better customer engagement and satisfaction, as well as continued business relevance and success.



Business challenges	CCM solution
Difficulty retaining customers and the risk of losing one or more major customers	Deliver a better customer experience with more rapid and targeted communications that improve customer service, loyalty, retention and satisfaction. This can lower the cost of acquiring, onboarding and servicing customers and improve customer satisfaction scores.
Inflexible transaction systems and communications that are poorly integrated with underlying systems	Easily capture, repurpose and integrate data from existing legacy systems to enable real-time triggers from the front office to start back-office processes that drive (or result in) multichannel customer communications.
Outdated customer communications	Modernize customer communications and improve brand consistency, compliance and personalization. Reuse content for multichannel communications that are securely delivered.
Costly paper print/mail processing	Lower costs with increased automation of paper-based processes while consolidating multiple documents into a single delivery model based on customer preference. Plus, avoid many print and mail related costs by sending communications electronically.
Costly communications management systems across lines of business	Reduce annual software maintenance and labor costs through application consolidation and standardization using a single, enterprise-wide CCM platform that can be deployed from any application across lines of business.
Declining customer experience due to fragmented, confusing, incomplete and delayed response	Integrate systems of multichannel engagement to enable event-driven tasks and decisions that ease and accelerate customer responses and actions through intuitive user experiences. Enabling front office workers to easily personalize a communication to an audience of one is essential.
Manual, error-prone reviews and approvals result in inconsistent communications	Streamline business processes by integrating customer communication platforms and applications. Smooth workflows and eliminate manual steps with the ability to automate multilevel approvals in the process. For example, trigger internal approvals and generate communications to keep the process moving. Use data-driven dynamic assembly and routing to enable straight-through processing that reduces costs for key customer communications, including sales quotes, policies and contracts, marketing, billing, transactions and claims.
Numerous document and template maintenance across lines of business	Reduce the number of templates required to generate accurate and compliant correspondence on demand with an object-oriented platform, where content is built once and reused across applications and communications. Intelligent templates can serve multiple purposes and include appropriate content inclusion or exclusion based on business rules.

Benefits of an enterprise CCM platform

Consider the following business challenges, and the real-life solutions provided by a single, customer communications management (CCM) solution:

A company's ability to meet transactional demands and channel preferences for better customer interactions across diverse markets is essential to customer retention and business growth. A key strategy used by leading enterprises is to consolidate siloed systems that create and manage customer communications into a single enterprise-wide CCM solution.

Find the right solution

Knowing what to look for in a new solution is vital.

An enterprise platform, not merely a point solution

Companies must look for an enterprise platform that supports design, creation, delivery and management of all consumer communications, regardless of type (such as billing notices, claims, correspondence, quotes and proposals), complexity or delivery channel.

Compatibility with the existing environment

A solution that fits well into an existing IT environment is a must for any considered solution. It should allow the company to use its existing hardware, printers and data formats. Often, companies can get bogged down with simply converting their data for the new system, not to mention the time and money associated with deployment and training. Companies should look for a solution that can easily access and leverage existing content in its native format, without having to transform or manipulate it.

Conversion strategy

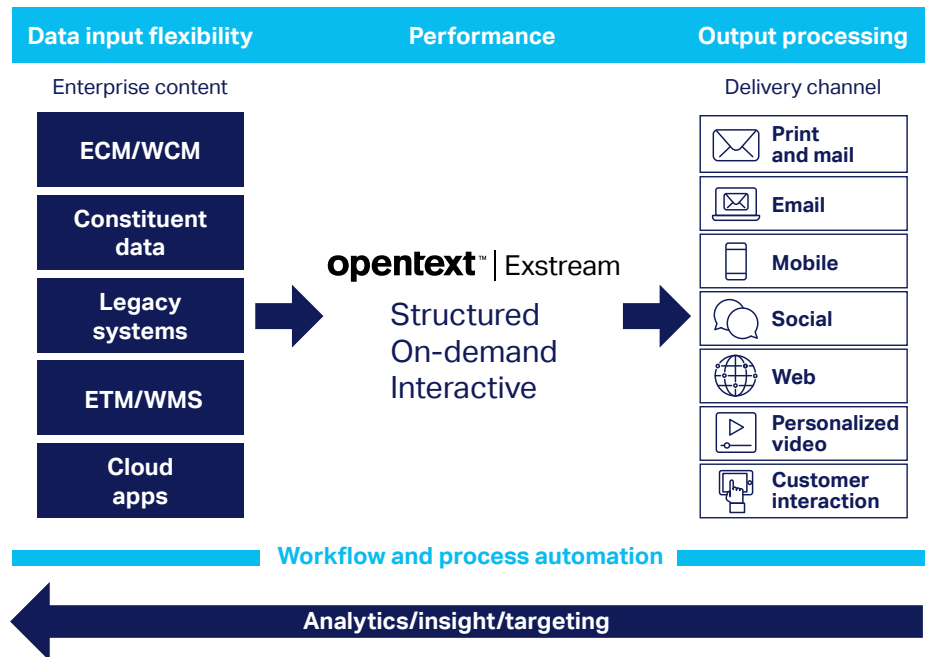
Just as homebuyers can get lost in the excitement of the amenities of their new home and overlook practical matters—like the reputation of their building contractor—companies replacing legacy core systems should examine the vendor's conversion strategy, including successful repeatable processes and software features. Converting large amounts of legacy content—letters, forms, messages, etc.—can be a daunting prospect without a strong partner backed by experience. Enterprises should also look to peers who have made a conversion to better understand what to expect. Lastly, companies should look for a CCM solution with features that promote ease of use (as backed by industry analysts), minimal IT support, higher productivity and the ability to enable a seamless multichannel experience.

It can seem overwhelming to consider migrating to a new CCM solution. But, the right vendor, solution and notable conversion experience will ease the process. And after the move to a new CCM platform, the ease of use and increased productivity and agility will help the company today—and ensure it is well prepared for the future.

OpenText transforms customer communications

A multichannel CCM solution, OpenText™ Exstream provides the broadest portfolio of customer-centric delivery formats available, including ECM, XML messaging, printing, email and the web, as well as SMS/text, MMS, video and app-ready content for mobile devices.

Exstream empowers business users to make the most of every customer touchpoint. It is proven to improve the customer experience and make customer interactions more profitable. It quickly and easily integrates with existing systems and can effortlessly access customer data, preferences, system data and rules to create insightful, impactful, real-time customer communications proven to fuel profitable business growth.



A proven difference

From back office to front office

Exstream helps minimize the number of solutions enterprises leverage and support. With Exstream, one template created in a single design environment can be used for a variety of production environments: real-time or on-demand, high-volume batch and interactive communications.

Business process interoperability

Exstream integrates with all systems and content. Its web-based services architecture means that Exstream interoperates with disparate systems, from claims administration to billing to CRM. Unlike some other tools, it doesn't matter what the data structure is, Exstream can pull the information without lag time, which is particularly important for supporting real-time customer web interactions. And equally important, Exstream can respond to and record transactions by updating all back-end system data.

Intelligent storage

Some organizations need to generate letters in TIFF format to store in their content management systems, but those documents have to be printed in PostScript or PCL formats. With Exstream, organizations can generate what is needed for archival and auditing purposes and generate the preferred outputs required for real-world printing and online viewing. Other delivery mechanisms address customers who may be more comfortable getting notices via text messaging. With deep integration into the digital and print worlds, Exstream provides a solution that truly differentiates from competitors.

Scalable by design

Thanks to its single-customer communications management architecture, Exstream does not—as some other solutions do—require a significant IT investment in more servers as the volume of documents scales up.

Enterprises that invest in Exstream will consistently see the value of expanding their deployment. Getting connected to a comprehensive view of customer-relevant information will help organizations stay connected with those customers. While this is always important, it has never been more so than in an uncertain and constantly disrupted economy.

What's next?

Business continues to change. While organizations understand the need to transform their cross-channel engagements, they may not know where to start in understanding their current capabilities and what they need for the future.

OpenText Exstream Professional Services provides a full set of options to meet the unique needs of any type of services engagement. The OpenText portfolio of services includes Solution Consulting, Solution Delivery, Education and Center of Excellence services—designed to provide organizations with proactive advice, guidance and recommendations to analyze and design an appropriate Exstream solution.

Contact us

For more information about the Exstream customer communication management solution, please visit <http://engage.opentext.com/products/exstream>.

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