

A Day in the Life of a Customer

Understanding the Value of Connecting Content to Processes



CRM (Customer Relationship Management) systems are critical to effective customer relationships. But the first step in optimizing these systems is to look at them from the outside-in — from the perspective of the customer.

Symptom #1 of a CRM system that has failed to incorporate unstructured information — Customer Risk.

- 89%** of customers get frustrated because they need to repeat their issues to multiple representatives.¹
- 87%** of customers say that companies need to put more effort into providing a seamless experience across all channels.²
- If a customer is not satisfied, **13%** of them will tell at least **15 or even more** people that they are unhappy...
- ...On the other hand, **72%** of customers will share a positive experience with **6 or more** people.³



Symptom #2 of a CRM system that has failed to incorporate unstructured information — Business Inefficiency.

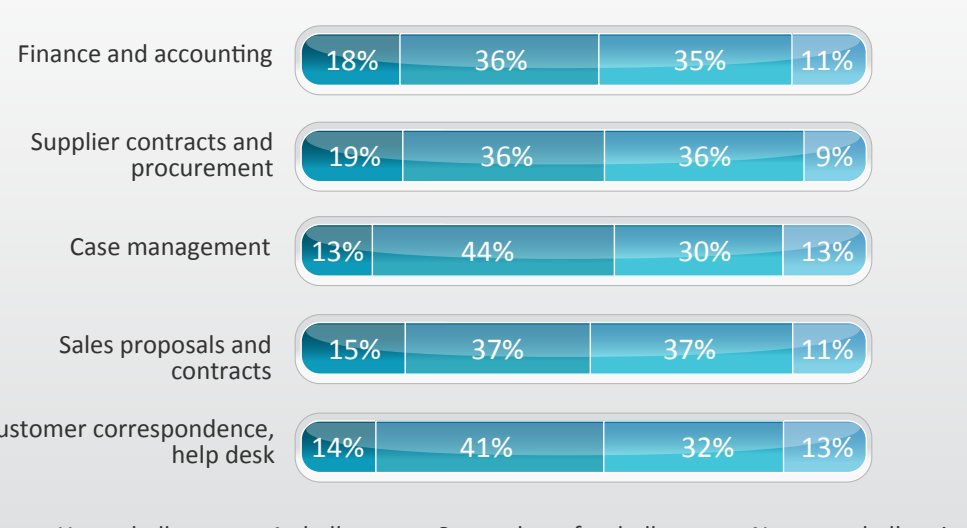


- Incomplete or missing information.
- Longer time to resolve customer inquiries.
- Limited collaboration for sales teams on opportunities.
- Critical customer documents not linked to information in the CRM system.
- Missed up-sell and cross-sell opportunities.
- Gaps between inconsistent and out-of-date information in multiple systems.
- Inadequate governance capabilities in CRM system resulting in non-compliance and legal exposure.

The root cause of a CRM system that fails to meet expectations -- no strategy to extend ECM into the CRM system.

There is typically a high degree of manual work in each of the core processes associated with CRM systems — and a high degree of *both business inefficiency and customer risk* if the processes or documents are mismanaged.⁴

How much of a challenge are semi-structured documents (like an invoice) unstructured documents (like a contract) and unstructured communication (like a text or an email) in these CRM processes?



Content in context is key to both addressing customer expectations AND improving business efficiency.

<p>Information sharing and collaboration</p> <p>Contribute to a culture of sharing and community — by improved ease of use and access across all departments.</p>	<p>Transparent marketing activities</p> <p>Enhance awareness and avoid communication errors — by ensuring any email or customer exchange is visible in your CRM system.</p>	<p>Single view of the customer</p> <p>Accurate customer insight — through easy access to correspondence, contracts submitted / relieved documentation.</p>	<p>Accelerated sales support</p> <p>Improve sales productivity — by minimizing search time and overhead to manage content.</p>	<p>Integrate with Finance / back-office apps</p> <p>Minimizing IT costs and improving data consistency — by connecting Salesforce / CRM content to ERP content.</p>
<p>Complete Customer relationship details</p> <p>Shorten successful sales cycles — by links to the latest contracts, essential documentation and best practice content.</p>	<p>Safeguard essential sales information</p> <p>Securely manage vital customer content — consistent with corporate governance policies and procedures.</p>	<p>Consistent sales work streams</p> <p>Meet the mobile sales workforce — Applications that work anywhere, on any device.</p>	<p>Improved scalability</p> <p>Make your business ready for growth — by integrating enterprise grade content management and keeping CRM lean.</p>	

Moving forward

What are the benefits of an integrated content approach your CRM system?

- Provides 360-degree view of customer information
- Provides single source of truth for customer information
- Increased knowledge worker productivity, satisfaction, and effectiveness
- Controls unstructured content through information governance
- Simplified cross-departmental collaboration
- Standardizes templates, policies for customer communication

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Findings cited in this graphic are from:

¹ Accenture, Accenture 2013 Global Consumer Pulse Survey
² Kampyle, Optimizing Omni-Channel Experiences with Customer Feedback
³ Esteban Kolsky, Customer Experience for Executives
⁴ AIIM, 2018, Enhancing Your RPA Implementation with Intelligent Information