

SAP and OpenText: Five winning customer communications strategies

Cross-industry insights from 500 leaders on the real impact of AI



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Modern customers want it all, and they want it now.

Organizations that deliver personalized, timely, and compliant communications across preferred channels are winning customer loyalty and driving revenue growth. Those that don't are falling behind.

The challenge? Most organizations have fragmented systems that create disjointed customer experiences. Legacy communication platforms can't keep pace with customer expectations for personalization and instant engagement across digital channels. Manual processes slow time-to-market and increase operational costs. And disconnected data prevents the kind of insights needed to anticipate customer needs.



DID YOU KNOW?

While early, 70% of mature AI users are highly satisfied with their return on AI investment, only 42% of newer adopters felt the same.¹

The communications gap

Consider the typical scenario across utilities, telecommunications, manufacturing, retail, oil and gas, and transportation industries:

- **Customer communications are scattered** across multiple systems, making it difficult to maintain brand consistency or track customer interactions effectively.
- **Manual document creation processes** slow down critical communications like billing statements, service notifications, policy updates, and account alerts.
- **Print-based communications** remain costly to produce and deliver, while customers increasingly demand digital options.
- **Limited personalization capabilities** result in generic communications that fail to engage customers or drive desired actions.
- **Compliance requirements** add complexity to every customer interaction, increasing risk and operational overhead.

For CX leaders, line-of-business managers, and IT teams, these challenges translate directly to lost revenue opportunities, reduced customer satisfaction, and increased operational costs.

Information management is the foundation from which raw data can be transformed into valuable insights and intelligent action. It enables organizations to capture, govern, exchange and gain insight from data while keeping it secure. It enriches end-to-end processes with knowledge. Both unstructured and structured information flows across the business ecosystem.

Through information management, businesses can consolidate and integrate information so it can be managed transparently throughout its entire lifecycle.

A better approach

Leading organizations are transforming their customer communications by adopting integrated, cloud-based platforms that connect seamlessly with core business systems like SAP. By breaking down silos and automating communications workflows, they're achieving:

- **Faster time-to-market** for new communications and campaigns.
- **Reduced operational costs** through automation and digital channel adoption.
- **Increased customer engagement** through personalized, multi-channel communications.
- **Better compliance** with automated governance and audit trails.
- **Higher revenue** from improved customer experiences and loyalty.

This guide explores five best practices that organizations across utilities, telecommunications, retail, transportation, high-tech manufacturing, and downstream oil and gas are using to boost revenue and transform customer communications—from SAP integration and hyper-personalization to high-volume processing and digital channel adoption.

¹OpenText and Foundry market research, [AI is redefining the role of the knowledge worker, 2025](#)

1. Build seamless SAP integrations for unified communication workflows

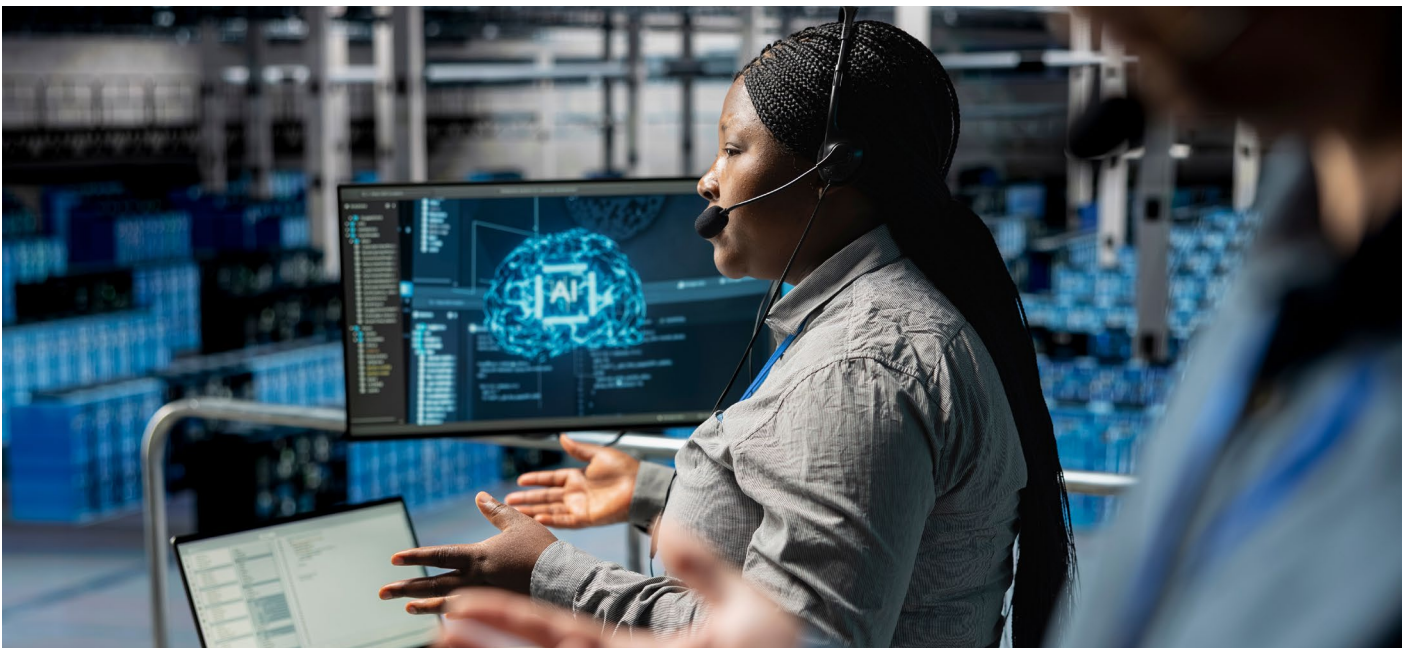
For organizations running SAP as their core business platform, disconnected communication systems create costly inefficiencies. When customer communications operate separately from SAP data, teams struggle with manual processes, delayed responses, and inconsistent customer experiences.

The integration imperative

SAP holds critical customer data: account information, transaction history, service records, and more. Yet many organizations still rely on separate systems to create and deliver customer communications. This disconnect forces teams to manually extract data, recreate information across systems, and cobble together communications without a complete view of the customer.

The impact affects every department:

- **Utilities** need to generate millions of billing statements and service notifications based on SAP meter data and account information.
- **Manufacturing** companies must create order confirmations, shipping notifications, and warranty communications tied to SAP sales and service data.
- **Telecommunications** providers rely on SAP for subscriber management but use separate systems for billing and customer notifications.
- **Retail oil and gas (downstream)** organizations need to communicate with customers about deliveries, pricing, customer loyalty programs, and account status based on SAP logistics data.



Benefits of integrated SAP communications

Organizations that connect their customer communication management (CCM) platforms directly with SAP systems realize immediate advantages:

- **Eliminate manual data entry:** Communications automatically pull accurate, real-time data from SAP, reducing errors and saving hours of manual work.
- **Accelerate document creation:** Business users can generate personalized communications directly within SAP workflows—from order confirmations to service notifications—without switching between systems.
- **Ensure brand consistency:** Centralized templates and digital assets maintain consistent branding across all customer touchpoints, even as communications are generated from different SAP processes.
- **Scale effortlessly:** Automated batch processing handles high-volume communications like monthly statements while supporting on-demand generation for customer service interactions.
- **Improve compliance:** Integrated systems maintain complete audit trails, version control, and governance across all customer communications.



QUICK TIP

Start with high-volume, repetitive communications like billing statements or order confirmations. These deliver quick wins that demonstrate ROI and build momentum for broader integration initiatives.

Best practice checklist: SAP integration

Your solution should:

- Integrate natively with SAP business processes and data structures
- Enable business users to create and modify templates without IT support
- Support both batch and on-demand document generation
- Maintain complete audit trails for compliance
- Scale to handle peak volumes without performance degradation
- Provide multi-language and multi-format support
- Connect with digital asset management for brand consistency

2. Create hyper-personalized communications that resonate

Generic, one-size-fits-all communications no longer work. Customers expect every interaction to be relevant, timely, and personalized to their specific needs and preferences. Organizations that deliver this level of personalization see measurably higher engagement rates, improved customer satisfaction, and increased revenue. Customer success also hinges on being able to react to mission-critical events with the right communications.

Proactive communications beyond billing

True hyper-personalization goes far beyond inserting a customer's name into a template. It means tailoring every element of a communication—content, timing, channel, and offers—based on comprehensive customer data and behavior patterns.







Consider these examples:

- A utility company sends proactive energy-saving tips to customers based on their actual usage patterns and weather forecasts, not generic advice to all customers.
- A manufacturer includes relevant product recommendations in order confirmations based on purchase history and complementary items.
- A telecommunications provider customizes billing explanations based on plan changes, usage spikes, or international roaming—addressing questions before customers need to call.
- A retailer adjusts promotional content dynamically based on browsing behavior, previous purchases, and real-time inventory.



During critical events, inform before they inquire.

Proactive communications is more than just billing.

Utilities		Power outage, infrastructure failure notifications, gas leak warnings
Manufacturing		Supply chain disruptions, sudden production halts
Financial Services		Potential security breaches, suspicious activities in their accounts
Transportation		Service disruptions, flight cancellations, alternative options
Retail		Product recalls, safety concerns, time-limited promotions
Government		Emergency alerts, public health notifications, policy changes

The personalization advantage

Organizations that excel at personalization see concrete results:

- **Increased engagement:** Personalized communications achieve significantly higher open rates, click-through rates, and response rates compared to generic messages.
- **Reduced service costs:** When communications proactively address customer questions and needs, contact center volume decreases. Snohomish County PUD cut one to two minutes off calls with correspondence elements with improved communication quality.
- **Higher customer satisfaction:** Customers who receive relevant, timely communications rate their experiences more positively and demonstrate greater loyalty.
- **Improved conversion rates:** Targeted offers and recommendations based on customer data drive measurably higher purchase rates and increased revenue per customer.

Personalization is driving big numbers across sectors. Financial services companies are using personalized marketing to increase revenue by more than 30 percent, health care organizations are improving ROI up to 300 percent, and retail brands are increasing incremental revenue by \$1 billion over three years.²

² Boston Consulting Group, [Personalization](#), 2024

Enabling technologies for hyper-personalization

Modern customer communication platforms make sophisticated personalization accessible to business users through:

- **Dynamic content assembly:** Rules-based engines automatically select relevant content blocks, images, and offers based on customer attributes and behaviors.
- **Rich media integration:** Video, interactive elements, and dynamic imagery create engaging experiences that static documents can't match. Digital asset management systems ensure brand-consistent multimedia content is readily available.
- **Channel optimization:** Communications adapt automatically for different channels—what works in email differs from SMS or mobile app notifications.
- **Real-time data integration:** Customer communications pull the latest account information, transaction history, and behavioral data at the moment of generation.
- **A/B testing capabilities:** Business users can test different content variations to continuously improve engagement and conversion rates.

DID YOU KNOW?

Organizations that deliver consistent, personalized experiences across departments see 41% faster revenue growth, 49% faster profit growth, and 51% better customer retention compared to their peers.³

Making personalization practical

The key to successful hyper-personalization is making it operationally feasible. This requires:

- **Unified customer data:** Connect customer information across systems to build complete profiles that fuel personalization decisions.
- **Business-user tools:** Enable marketing and customer experience teams to create and modify personalized content without technical expertise or IT dependency.
- **Scalable processing:** Ensure personalization works for both one-to-one communications and millions of monthly statements.
- **Compliance controls:** Maintain proper governance even as content becomes more dynamic and personalized.



³ CMS Wire, October 2024

3. Scale communications with high-performance, high-volume solutions

For organizations in utilities, telecommunications, manufacturing, and other industries that serve millions of customers, the ability to process high volumes of communications reliably and efficiently is non-negotiable. Monthly billing cycles, regulatory notifications, and service updates can require generating and delivering millions of documents within tight processing windows.

The high-volume challenge

Consider the scale requirements:

- A regional utility may need to generate 2 million billing statements monthly, each with personalized usage data, rate information, and regulatory disclosures.
- A telecommunications provider processes millions of subscriber bills with complex rating calculations, usage details, and promotional offers.
- A manufacturing company generates hundreds of thousands of order confirmations, shipping notifications, and warranty documents daily.
- A transportation company produces regulatory reports, customer notifications, and operational documents around the clock.

Traditional document generation systems struggle under this volume, leading to:

- **Processing delays** that miss billing cycles or regulatory deadlines.
- **System crashes** during peak periods that require expensive recovery efforts.
- **Limited agility** that prevents adding new document types or updating templates
- **High infrastructure costs** from oversized systems needed to handle peak loads

The performance imperative

Modern, cloud-based customer communication management platforms deliver the performance and scalability needed for high-volume environments through:

- **Parallel processing architectures:** Distributed systems process millions of documents simultaneously, completing in hours what legacy systems require days to finish.
- **Elastic scalability:** Cloud-native platforms automatically scale resources during peak periods—such as month-end billing cycles—then scale down to reduce costs during normal operations.

- **Optimized rendering engines:** Advanced composition technology generates complex documents with dynamic content, charts, and formatting at speeds measured in thousands of documents per minute.
- **Automated workflow orchestration:** Intelligent processing routes documents through generation, approval, distribution, and archival without manual intervention, even at massive scale.

Real-world performance

A North American utility achieved dramatic improvements in document archival rates—reaching 1,200 documents per minute—after implementing modern document management integrated with SAP. This speed improvement translated directly to better customer experience through faster data retrieval and shorter wait times.

Beyond raw speed

High-performance communications platforms deliver value beyond just processing speed:

- **Reliability:** Robust error handling and recovery mechanisms ensure critical communications reach customers even when unexpected issues arise.
- **Resource optimization:** Efficient processing reduces infrastructure costs while maintaining performance, particularly important for budget-conscious IT teams.
- **Real-time capabilities:** Modern platforms support both massive batch processing and instant, on-demand generation for customer service interactions.
- **Performance monitoring:** Built-in analytics track processing metrics, identify bottlenecks, and provide insights for continuous optimization.

QUICK TIP

When evaluating high-volume communication platforms, test with your actual document templates and data volumes. Vendor benchmarks may not reflect the complexity of your specific use cases.

Best practice checklist: High-volume processing

Your solution should:

- Handle peak volumes reliably without degradation
- Support both batch and real-time generation
- Scale elastically to optimize costs
- Provide comprehensive monitoring and alerting
- Maintain sub-second response times for interactive use
- Offer flexible deployment options (cloud, hybrid, on premises)
- Include automated failover and disaster recovery



4. Accelerate digital channel adoption to meet customer expectations

The shift from print to digital communications isn't just about cost savings—it's about meeting customer expectations and enabling new forms of engagement. Customers increasingly prefer digital interactions that they can access instantly on their devices, respond to interactively, and manage on their own terms.

The digital transformation imperative

Customer preferences have shifted dramatically. Research shows that customers who can quickly and easily submit required documents through self-service channels report higher satisfaction scores. Yet many organizations remain heavily dependent on print communications due to legacy systems, regulatory concerns, or simply organizational inertia.

The business case for digital channel adoption is compelling:

- **Cost reduction:** Digital delivery costs a fraction of print, mail, and physical storage expenses. For organizations sending millions of communications annually, this represents substantial savings.
- **Speed and agility:** Digital communications reach customers instantly, enabling time-sensitive notifications, real-time updates, and faster response to market conditions.
- **Environmental impact:** Reducing paper consumption aligns with corporate sustainability goals and resonates with environmentally conscious customers.
- **Enhanced customer experience:** Digital channels enable interactive elements, rich media, and self-service capabilities that paper can't provide.
- **Improved tracking and analytics:** Digital delivery provides immediate visibility into which customers opened communications, clicked links, or took desired actions.



Digital channel examples by industry

Different industries are leveraging digital channels in creative ways:



Utilities: Real-time outage alerts via SMS and mobile apps keep customers informed during service disruptions. Personalized energy usage notifications help customers manage consumption.



Manufacturing: QR codes on products link to digital warranty information, maintenance schedules, and support resources—eliminating paper manuals.



Telecommunications: App-based notifications for plan changes, usage alerts, and billing information reduce contact center volume.



Retail: Abandoned cart reminders, shipping notifications, and personalized promotions delivered via customers' preferred channels drive conversion and loyalty.



Transportation: Real-time shipment tracking and delivery notifications via SMS or mobile apps improve customer confidence.

Building an effective digital channel strategy

Successful digital transformation of customer communications requires more than simply converting documents to PDF and emailing them. Organizations need a comprehensive approach:

- **Omnichannel delivery:** Support customer preferences by offering email, SMS, mobile apps, web portals, and messaging platforms like WhatsApp. Customers choose their preferred channel, not you.
- **Assured delivery mechanisms:** When a customer doesn't open an email, automatically send an SMS notification or app alert to ensure critical information reaches them.
- **Two-way engagement:** Move beyond one-way notifications to conversational interactions where customers can respond, ask questions, or take action directly within the communication.
- **Mobile optimization:** Ensure communications render properly on smartphones and tablets, where most customers now access digital content.
- **Accessibility compliance:** Digital communications must meet accessibility standards to ensure all customers can engage effectively, including those with disabilities.

Overcoming digital adoption barriers

Organizations transitioning to digital channels often face these challenges:

- **Customer opt-in requirements:** Build digital adoption by demonstrating value and making enrollment frictionless. Offer incentives for customers who choose digital delivery.
- **Regulatory compliance:** Ensure digital communications meet all regulatory requirements, including consent management, accessibility standards, and data protection rules.
- **Digital divide concerns:** Maintain print options for customers who lack digital access or prefer paper, while actively encouraging digital adoption.
- **Change management:** Help employees understand how digital channels improve both customer experience and operational efficiency.

5. Leverage GenAI to transform communications

Artificial intelligence is fundamentally changing how organizations create and deliver customer communications. But not all AI implementations are created equal. The organizations seeing the strongest returns are those adopting generative AI—systems that combine powerful language models with trusted enterprise information to deliver personalized experiences at scale.

Traditional approaches to AI in communications often struggle with accuracy, compliance, and trust. Governed GenAI solves these challenges by grounding AI capabilities in your organization's verified information—customer data, product specifications, regulatory requirements, and brand guidelines. This approach delivers three critical advantages:

- **Trusted, governed content creation:** Rather than generating responses from scratch, GenAI draws from your approved content repositories, ensuring accuracy and brand consistency while accelerating creation.
- **Enhanced clarity and compliance:** AI analyzes communications for tone, readability, and regulatory compliance before delivery—reducing risk while streamlining review processes.
- **Empowered business users:** Non-technical teams can craft, edit, and personalize content without IT involvement, dramatically reducing bottlenecks and time-to-market.

DID YOU KNOW?

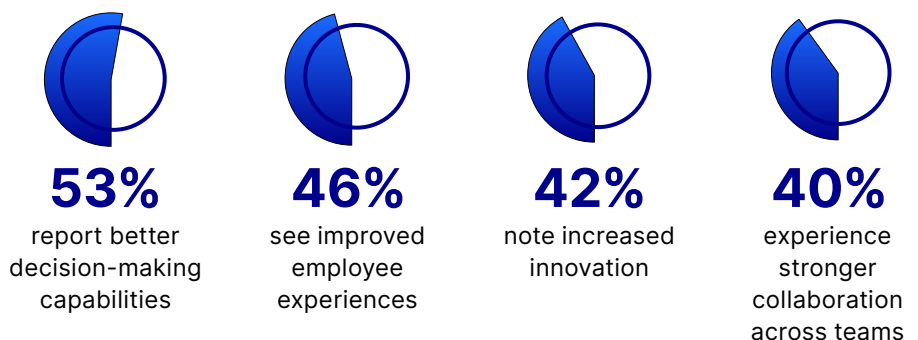
Organizations are now spending an average of \$5.4 million annually on generative AI tools and talent, with 59% ranking productivity among their top three anticipated benefits. But mature adopters are seeing returns that go far beyond efficiency, using AI to solve business problems, reduce risk, and drive strategic outcomes.⁴

AI maturity drives measurable results

OpenText research involving more than 500 senior IT leaders globally reveals a clear correlation between AI maturity and business outcomes. Organizations using AI for 12 months or longer report significantly higher satisfaction with their return on AI investment compared to newer adopters. The data tells a compelling story:

- **78% of mature AI users** strongly attribute productivity improvements to modern information and automation tools, compared to just 52% of organizations testing AI.
- **69% of mature adopters** report satisfaction with their return on AI investment, demonstrating that strategic, well-implemented AI delivers measurable value.
- **77% of organizations** are already using AI in some form, with adoption expected to rise sharply as the technology proves its worth.

But productivity gains are just the beginning. Organizations implementing AI-driven communications are seeing improvements across multiple dimensions:



⁴ Foundry research commissioned by OpenText, Information Management for an AI-Driven Future, June 2025

Transform your customer communications strategy

Organizations across utilities, oil and gas, telecommunications, retail, transportation, and manufacturing face a critical choice: continue managing customer communications with disconnected systems and manual processes or embrace integrated platforms that deliver personalized experiences at scale.

The five best practices explored in this guide—SAP integration, hyper-personalization, high-volume performance, digital channel adoption, and AI enhancement—represent proven approaches that leading organizations are using to transform customer communications from a cost center into a revenue driver.

The integrated advantage

The most successful implementations don't tackle these practices in isolation. Instead, they leverage unified customer experience platforms that deliver:

- **Seamless SAP integration**, which eliminates manual data handling and connects communications directly to core business processes.
- **Sophisticated personalization** powered by unified customer data and digital asset management.
- **Cloud-native scalability** that handles both massive batch processing and real-time interactions.
- **Omnichannel delivery** that meets customers on their preferred digital channels.
- **AI-powered intelligence** that optimizes content, timing, and engagement.

Solutions designed for your industry

OpenText™ Document Presentation for SAP® and OpenText™ Digital Asset Management for SAP® Solutions provide industry-leading capabilities specifically designed for organizations running SAP as their core business platform:

- **Native SAP integration** enables business users to create and deliver personalized communications directly within SAP workflows.
- **High-performance processing** handles millions of documents reliably, with elastic cloud scalability.
- **Digital asset management** ensures brand-consistent multimedia content across all customer touchpoints.
- **Omnichannel capabilities** support email, SMS, mobile, web portals, and messaging apps.
- **Enterprise-grade security** and compliance features meet the strictest regulatory requirements.
- **AI-powered personalization** delivers contextually relevant content automatically.



Resources

[Take a tour](#)
of OpenText Document
Presentment for SAP.

[Watch a video](#)
to see how to boost your
brand and time-to-market
with OpenText DAM for SAP.

Your path forward

Ready to transform your customer communications? Start by:

- 1. Assessing your current state:** Where are communications creating friction in the customer experience or driving operational costs?
- 2. Identifying quick wins:** Which high-volume, repetitive communications could benefit immediately from automation and integration?
- 3. Building your business case:** Quantify the cost savings, efficiency gains, and revenue opportunities from better customer communications.
- 4. Starting strategically:** Implement proven solutions that deliver measurable ROI within 12-18 months.
- 5. Scaling what works:** Expand successful implementations across business units and communication types.

Thriving organizations are those that deliver exceptional customer experiences through intelligent, personalized communications. By implementing these five best practices, you can join them in turning customer communications into a competitive advantage.

**Transform your customer communications with
OpenText Document Presentment for SAP and
OpenText Digital Asset Management for SAP.**

[Get started >](#)