Are You Ready to Improve the Customer Experience?

8 Principles for Success through Better Communications

Abstract

The world is becoming more digital every day. Interactions between organizations and customers that used to be conducted via phone or in-person are turning to digital channels (e.g., email, text messaging and portals) and are growing at exponential rates. As a result, savvy organizations are turning to Customer Communications Management (CCM) solutions as a key element in their customer experience strategy—from customer acquisition to retention and extension. CCM solutions are an integrated set of software applications to design, deploy, deliver and manage both traditional print and digital communications with customers. CCM software solutions provide a platform for the many types of correspondence and conversations that take place between the organization and the customer through a multitude of channels and devices.

This paper will outline key principles that will help ensure a successful Customer Communications Management initiative across the entire organization—from the Information Technology (IT) department to business users' desktops. These principles combined with a partnership with the right provider can help organizations reduce the risks associated with the new CCM initiative; drive a rapid, continuous return on investment; and transform to capitalize on the digital explosion.

Introduction

Today's business environment has undergone significant changes, especially over the past year. The increased use of one-to-one communications has pushed organizations to modify the way they interact with their customers and focus on building customer loyalty. The only organizations that will thrive are those that are able to develop, maintain and expand relationships with their customers.

The primary enabler of improved customer relationships is accurate, timely and personalized communications delivered via print, or increasingly via digital channels. Most organizations often find themselves facing the dilemma of balancing efficient communications with all of their customers without compromising the quality of each individual interaction. This is where Customer Communications Management applications come into play.

Research indicates that four out of every five organizations struggle with manual processes or "in-house"-developed solutions to produce and deliver communications.

First Things First: What Is Customer Communications Management (CCM)?

Customer Communications Management is an integrated set of software applications to design, deploy, deliver and manage both traditional print and digital communications with customers. CCM allows organizations to efficiently produce communications (e.g., printed documents, emails, text messages) in large volumes while simultaneously personalizing content for each individual communication.CCM software solutions provide a platform for the many types of correspondence and conversations that take place between the organization and the customer through a multitude of channels and devices, including:

- Personalized correspondence
- Contracts and policies
- Letters
- Proposals
- Notices
- Statements

Principles for Success

Customer Communications Management will improve the customer experience and drive operational efficiencies across the entire organization. But to achieve these, organizations need to look beyond their existing transactional technologies that were not designed to address the ever-changing interaction and communication needs of customers. The most effective strategy for improving the customer experience through better communications comes from choosing a solution partner who can identify the best solution to align with existing business processes and leverage existing investments—instead of changing processes and investments to fit their software solution.

Checklist: Become a CCM-Enabled Organization

A successful CCM initiative should include the following principles:

1. View CCM as a discipline, not just a technology.
2. Champion CCM throughout the organization.
3. Understand CCM's impact at all levels of the organization.
4. Create a change-management plan.
5. Formulate a strategic CCM initiative … not just a tactical project.
6. Select a communication to use as a pilot test, refine, and then go to production.
7. Set appropriate expectations.
8. Engage, communicate and train.

Principle 1: View CCM as a discipline, not just a technology.

Customer Communications Management is much more than just a technology or software solution. Obviously, you have to have a good software solution to generate and deliver high-volume communications, but that's not the entire equation. Underestimating what it takes just to generate and produce personalized documents in high-volume batch or in real time correctly is a big risk, as is underestimating the integration into your complex environment.

For CCM to become an accepted and successful discipline, it is necessary for organizations to work with a technology solution provider who will understand their business, analyze their needs and tailor a solution to their specific requirements while not radically altering their existing mission-critical communications processes.

In addition, organizations must ensure that adequate resources are available to create and maintain communication content as it evolves. Creating communications is not a one-time project. Over time, communications and their content must be updated and supplemented as business needs change. Empowering business-line professionals across the organization with the tools to update, create and deliver communications—relieving the burden on IT—is key to moving CCM from just a technology to a discipline.

Principle 2: Champion CCM throughout the organization.

A fully implemented, Customer Communications Management solution will touch almost every aspect of the organization, from the IT department to the business-line user's desktop. To be successful, CCM initiatives must have several champions across the organization. These are individuals who believe in the initiative, enthusiastically advocate it and have the clout to "make things happen." Initiatives that lack champions generally don't get off the ground.

Those initiatives with only one champion are also at serious risk, and losing the champion can spell disaster. Many times, this turns out to be a real problem for CCM projects due to their phased implementation. For example, the first phase of implementing a CCM solution might focus on one department, one communication type or one process and gradually spread to others over time. In order to ensure success at all levels, an organization should consider a tri-sponsorship approach: a champion at the Operational level, a champion at the IT level and another at the Executive level to support the overall vision.

Principle 3: Understand CCM's impact at all levels of the organization.

The process of adopting a new Customer Communications Management solution can also present a challenge. Buy-in is needed at all levels of the organization, and this may require cultural adaptation as well as process change. Those resources that are going to use the system everyday have to be part of the design. Don't make this decision in a vacuum. Include staff from the various groups that would directly or indirectly use the system.

To realize effective process change, organizations need to examine how well existing communication processes are working across all aspects of the customer care lifecycle. Non-optimized processes must be redesigned or replaced with new ones that have been created and/or agreed upon internally. The CCM technology component can be the most overwhelming, given the ever-expanding number of vendor offerings and technology alternatives. Organizations must look carefully at a variety of providers and CCM solutions before deciding which is best for their needs.

Principle 4: Create a change-management plan.

Simplifying the management of complex, customer communications involves choosing a CCM solution that's flexible enough to fit into current processes while not forcing the organization to alter all of its best practices; but any level of change involves risk. An organization can dramatically lower the risk involved with investments in new CCM technologies by developing a comprehensive change-management plan that specifies when and how a new solution will gain acceptance within the organization.

Further risk mitigation can be achieved by working with a CCM provider that takes the time to really know and understand the organization's business and needs, explains the options that exist, identifies the solution that best fits the existing business processes and leverages the investments that have already been made. Beware of the provider that wants to change existing processes and investments to fit their CCM solution.

Principle 5: Formulate a strategic CCM initiative … not just a tactical project.

CCM should be positioned as a strategic initiative as opposed to a project, because a project implies a finite timeline. When it comes to customer communications, a CCM initiative is never really done; it is introduced and built and then when it goes "live," it must be maintained and evolved.

If a CCM initiative begins with a strategic goal that is top-down motivated (for instance, improving customer service or reducing costs through digitalization), then there is a more compelling value statement involved, and no one will focus on a tactical activity such as changing one metric. Improvements in individual metrics like communication costs are measurable, but their value is limited compared to the return from making all the investments in customer data actionable through personalized communications.

Customer interactions are unique to every organization whether delivered via print, emails, text messages or portals, and they are key drivers of the customer experience. One organization's needs and challenges are not the same as the organization down the street. To get things going, decide what goals must be accomplished in your organization and why they are important. Then, and only then, try to identify a CCM solution and methodology that will help attain those goals within your current environment.

Principle 6: Select a communication to use as a pilot test, refine, and then go to production.

To be successful, organizations need to plan an approach that will maximize their CCM investment. For a pilot, organizations should select one communication that needs improvement. Work should commence on automating all aspects of that communication's content—from embedding sophisticated logic and real-time, customer-specific data to formatting for multiple output types and delivery channels. Once tested and refined, the communication can be moved to production. It is much better to be comprehensive for a narrow communication set than fail to get enough depth. Utilizing the lessons learned from the pilot, expand the implementation of automated CCM to other communications and across the organization.

Principle 7: Set appropriate expectations.

The key success factor for any CCM initiative rests in helping executive management set appropriate expectations. Users and management alike must identify what results they want to achieve with the CCM solution, what it will take to get those results and how success will be measured. While determining what results and how they will be achieved are fairly straightforward, measurement is where most organizations fail.

Organizations struggle with measurement because they fail to set a "before" baseline to compare "after" results, such as:

• How satisfied are customers with the organization's communications?

• How long does it take, on average, to produce communications?

• How much does each communication cost, on average, to produce?

• What are errors in communications costing the organization (e.g., rework)?

Speed ahead one year when the new CCM system is up and running, communications are flowing and business users love it. Then the CEO says, "Where's my return?" If a measurement system is not in place, this will be a tough question to answer—especially for any metrics that weren't in existence before the new CCM system.

In addition to setting management expectations, organizations have to also set business users' expectations. For example, if users will be restricted from inputting free-form text or editing certain paragraphs within a specific communication, they must be informed of the restrictions and given reasons as to why the restrictions exist to keep them from creating correspondence outside the system. In this situation, it is better to educate them and appropriately set their expectations in order to avoid circumvention and, ultimately, compliance issues.

Principle 8: Engage, Communicate and Train.

In order to get the right results, organizations need to start by engaging with a CCM solution provider with the following traits:

- Engages to learn the organization's business, conducts a needs analysis and tailors a CCM solution to specific requirements versus having the organization alter its business processes to the solution offering.

- Develops CCM solutions that leverage existing processes and infrastructure investments to drive a lower total cost of ownership over the entire life of the solution.

- Provides experienced professional services and support teams to ensure that qualified resources are always available to quickly assist in configuring, implementing and managing a solution that delivers a rapid return on investment.

- Can provide measurable, tangible results that focus on core business issues such as reducing TCO (total cost of ownership) and improving ROI over the life of the investment.

Engage: End-users, administrators and everyone involved with the new CCM will need to fully engage across all levels of the organization. Implementing a new, modern CCM solution successfully depends on more than just finding the right software. Organizations must also get end-users to accept and adopt the new technology, which is often difficult to achieve, especially for those who are sensitive to change because they:

- Do not understand the reasons for the change
- Did not participate in formulation of the change
- Did not receive sufficient information about the change
- Did not have adequate time to adjust
- Did not get sufficiently trained on the change

Communicate: In order to ensure engagement at the end-user level, it is vital to establish regular and consistent communications that convey benefits such as:

- A highly intuitive user interface that streamlines access to communication templates via "point-and-click"

- Workflows that guide users easily through the assembly, generation and delivery of personalized communications

- Tools to efficiently reformat and repurpose communications to accommodate multiple delivery channels (e.g., email, print and text messages)

- Navigation to quickly locate frequently used communications based on filters as well as the last communication template used

Train: Organizations must develop a comprehensive training regimen that addresses all users, from communication template authors to the end-users. Highly intuitive, easy-to-use interfaces for both template authors and end-users can help reduce training times significantly.

Summary

Organizations often find themselves facing the dilemma of communicating efficiently with all customers without compromising the quality of each personalized contact. And, with statistics indicating that the majority of all customer interactions are document-based, Customer Communications Management (CCM) solutions are vital to the success of any organization. A successfully deployed CCM solution reaches across the entire organization to minimize the risks involved and simplifies complex communication processes while honoring current best practices within the organization.

About Cincom

Cincom delivers the most intuitive, customer communication solutions in the industry. By streamlining the design, deployment, delivery and management of high-volume, highly personalized communications, Cincom helps organizations:

- Acquire, strengthen and expand customer relationships
- Minimize compliance and regulatory risks
- Reduce operating costs
- Accelerate time-to-market for all their customer communications

Cincom leads the industry in providing customer communication solutions that are easy to integrate, easy to use and deliver a rapid and continuous return on investment.

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