



# The Missing Ingredient for Customer Communications is **Results**

## FACT SHEET

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**It should be a simple formula:** better communications lead to better customer experiences, increased customer retention, long-term growth and profitability. However, over the past five years companies like Amazon and Apple have continued to raise the bar for personalized interactions. As a result, the expectations customers bring to their engagement with companies have increased tremendously. Not surprisingly, when organizations fail to meet those expectations, it diminishes customer loyalty and retention. Customer Communications Management (CCM) is essential for organizations as it enables them to meet customer expectations through personalized, behavior changing communications that enhance the experience, allowing them to compete on the same playing field as market leaders.

As you look to enhance your organization's customer communications capabilities, your first path for consideration is probably to build in-house. Perhaps you already own solution components such as composition tools. Your IT team has developed and maintained your customer support applications, understands your data and workflows and knows where additional communications channels can be implemented. Building CCM in-house may seem to be very doable, and at a lower price point than a vendor supplied solution.

However, the reality is that in-house customer communications management initiatives usually fall short on delivering on their promises. That's because building a CCM solution requires orchestrating a broad and diverse mix of components. You may have developed homegrown versions of some; others may have been purchased and then bolted together. Some technologies, like data collection and management or communication archiving, require large capital expenditures as well. Integrating these different components is a significant undertaking. Finally, it places demands on costly IT resources that are better dedicated to other initiatives.

This fact sheet details the components required to implement an end-to-end CCM solution. But implementation in and of itself doesn't translate into better communications. This is where deploying CCM as a hosted managed service (HMS) offers advantages. The risks and responsibilities for day-to-day support can be managed by a company with a track record of delivering results, not just technology. Collaborating with a trusted partner experienced in delivering best-in-class communications is the fastest path to increased profitability and long-term growth.

### DataOceans Delivers Results: A CCM Case Study

With improved eDelivery, Apria delivered a frictionless billing experience to patients and sped time to revenue, leading to a 40% increase in online payments and a 10% reduction in phone support costs.

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# **CUSTOMER DATA** THE FIRST KEY INGREDIENT

Customer data management is the first critical component of CCM. Organizations hold vast stores of customer data that they are incapable of leveraging for effective, meaningful communications. Most store customer information in multiple applications in addition to their core systems. A CRM, for example, contains customer email addresses and delivery preferences, while a payment system holds ACH data, invoices, and credit card information.

These data sources are often siloed and disparate, so that using the data for customer communications requires the creation of a centralized repository. Centralization and synchronization of data, as well as the maintenance and overhead associated with downstream changes, presents a significant challenge for IT. Data is stored in a variety of formats and often indexed on different fields. An email address used to access a customer in a CRM may not be held on existing databases which identify a customer using an account number. Data may be sourced from third parties, created at different points each month, or delivered in real time via APIs. These reasons alone are what limit most companies from being able to curate personalized and meaningful interactions. To build a robust CCM application, all of this data will need to be validated, standardized and aggregated in a data repository. Technical staff will need to dedicate ongoing time to manage the repository and ETL processes.

An important component of the DataOceans' Oceanus solution is our Data Normalization and Aggregation (DNA) process that employs best practices for identifying and capturing customer data across the enterprise and for efficiently storing this data for use in communications. Implementing Oceanus as a hosted managed service also removes the need to dedicate in-house staff to the creation and support of a data repository.



Internal &  
External Data  
Sources



Aggregation &  
Normalization



Centralized  
Database

### DataOceans Delivers Results: A CCM Case Study

Flagship Credit Acceptance transformed the customer billing experience with mobile-friendly customer communications that enabled a 66% increase in eDelivery and a 60% reduction in print and postage costs.

[Read the case study](#)



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### **MANAGING** COMMUNICATIONS CONTENT

Print and electronic communications are built by combining data with content and leveraging business rules that determine their use. Most organizations utilize a wide range of content, including templates, variable text, boilerplate text, images, videos and logos. As with customer data, the first step in managing content is to inventory it, and the business rules that guide its use, and centralizing them in one data store. This can be difficult because content may be owned by different departments, stored in different content management solutions, held by outside print providers, or even hardcoded into documents.

Assembling one single version of content and business rules is only a first step. There has to be a way for business users to manage content and rules moving forward. Limited development timeframes often means that in-house communications applications don't include business-friendly interfaces. As a result, technical staff are needed to make content updates. This is costly and slows the rate that changes can be applied, preventing organizations from operating with the agility they need to remain competitive.

When implementing its Oceanus CCM solution for clients, DataOceans uses a proven methodology to identify and collect content assets. The solution features a modern, user-friendly interface that enables business users to update content for customer communications without involving IT staff. Our Targeted Content Management system gives business users powerful functionality to target variable and personalized content to different customer segments. To ensure compliance, all content changes are tracked with version control and auditing.

### **MANAGING** DELIVERY, CONSENTS & PREFERENCES

Customers today expect to receive communications via the channels and devices they prefer. And they expect to interact with communications seamlessly across all available channels. However, customer communication systems developed in-house are usually restricted to printed mail and email channels.

Customers also increasingly understand that they own their data, so effective engagement during the consent process is now essential to improving customer experience. But organizations don't always store delivery and consent information in one place. A CRM system used by sales and marketing may have captured it during the sales process. Core systems may hold another set. This makes it difficult to propagate preference and consent changes across all systems.

DataOceans' CCM solution delivers communications across every channel that customers use. The Oceanus Preference Center houses consent and preference information in one central store and syncs preference and consent changes with core systems as needed to enable consistency and governance. A customer portal enables customers to self-serve their consent and preference settings, reducing call volumes, while customer service representatives can make updates on their behalf in the CSR portal.

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Many organizations already support one or more composition tools to build communications. For consistency in presentation across mobile phones, tablets and laptops, these tools need to render communications in responsive, HTML5 format, in addition to generating traditional print output. However, composition tools that were built in-house, or that are outdated, are often unable to create responsive communications. And, although they may employ a WYSIWYG editor to build communications, these tools usually require specialized skillsets to use them effectively. Often a tool is purchased and implemented as a “set it and forget it” solution without dedicating internal staff to its support. As a result, subsequent changes may be assigned to an inexperienced resource, taking longer to implement and decreasing efficiency.

Composition tools also require ongoing support and investment to keep the software licensed and up to date. Alternately, a print service provider may own the composition tools and generate print-ready files from raw data submitted by the client. But while this approach may save on licensing and support, and eliminate the requirement for in-house expertise, it also prevents switching print providers for costs savings, as well as leveraging new technologies, like interactive content, as they continue to evolve.

DataOceans’ Communications Designer renders communications in responsive, HTML5 format. Targeted and personalized communications delivered seamlessly across channels improves the customer experience, driving eDelivery, reducing attrition and increasing wallet share. Oceanus can also help save on licensing and maintenance support costs by reducing the number of composition tools that need to be supported. Additionally, the printer-agnostic approach to output generation makes it easy to switch print service providers for additional savings.

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### COMMUNICATIONS: ARCHIVING & REDELIVERING

To support compliance as well as for servicing and redelivery, every customer communication must be archived. Archived communications need to be searchable by phone representatives taking customer calls as well as by customers using an online portal. For ePresentment, communications should be able to be recreated in a browser-enabled and responsive format like HTML5. The archive also needs to save the metadata associated with each communication for auditing and compliance. Most in-house applications are unable to deploy a communications archive with this level of functionality, ultimately introducing risks to their compliancy.

The DataOceans Oceanus platform archives every communication sent to customers. For compliance purposes, all customer communications are saved in the format in which they were delivered. For servicing, they can be viewed in the same format being viewed by the customer in session and redelivered on a device or channel as requested by the customer.



### WORKFLOW PROCESSING

Since in-house customer communication applications are usually comprised of a mix of applications and processes, they provide little or no centralized control over, or visibility into, operational workflows and job statuses. Exception processing often requires manual intervention. Identifying and correcting errors is time-consuming and increases the risk of sending out incorrect communications.

From initial ETL through document delivery and archiving, DataOceans' CCM solution provides complete control and visibility at every point of the communications lifecycle, to identify problems before they impact customers or expose organizations to risk. Business users can preview output before it is released, pause and restart workflows, view exceptions, even roll back to prior workflow steps. Performance, throughput and time metrics are available to help optimize processes.

### DataOceans Delivers Results: A CCM Case Study

By partnering with DataOceans, SRP Federal Credit Union was able to increase eDelivery of communications by 60% and save 20% in print costs, with minimal IT involvement.

[Read the case study](#)



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### **REPORTING AND ANALYTICS**

Reporting and analytics are critical for organizations to understand which communications are effective and which need improvement. For in-house solutions, reporting and analytics is usually a late-stage deliverable or never realized. As a result, the ability to gain insights from retained customer data is limited at best. Reporting functionality may be somewhat lightweight, perhaps just a few standard reports without ad hoc reporting capabilities that enable business users to create their own custom reports. The inability to understand and predict customer needs and behavior does not allow for improvements to customer experience.

Oceanus displays analytics on workflow processes as well as on delivery metrics such as open rates, click throughs and email bounces. These enable an organization to improve efficiencies in their operations and understand customer interactions to further optimize communications. In addition to standard reports, Oceanus includes a BI and analytics layer to empower business users to build their own analytic queries. All communications data is stored in a centralized repository, resulting in a rich trove of information that can be mined for further insights in order to create an optimal customer experience.

### **CUSTOMER PORTAL INTEGRATION**

Organizations need to support a customer portal which allows customer self-service; for example, to view activity, manage profile and delivery preferences and make and manage payments. In addition, the customer portal will need to capture any changes and synchronize them with core systems. It should also enable customer access on any device type. However, many organizations' customer portals lack omnichannel capabilities, are limited in function or in some cases are non-existent. As a result, call centers are overwhelmed with requests to make changes that customers would prefer to make themselves.

DataOceans' MyView customer portal gives customers the ability to view activity, manage profile and delivery preferences as well as to make and manage payments. This allows DataOceans' clients to realize significant cost savings related to payment and servicing. Integration with an existing customer portal can be accomplished via single sign on (SSO) or an iframe. For organizations that don't currently support one, DataOceans can implement a feature-rich standalone customer portal.

#### **DataOceans Delivers Results: A CCM Case Study**

Learn how redesigned, customizable statements from DataOceans helped a community bank reduce IT costs by 50% and print costs by 25%.

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### **CONCLUSION** FOCUS ON RESULTS

In the past year we've seen a dramatic increase in customer demand for digital self-service and the ability to execute a growing number of transactions online. This is pressuring organizations to expand their digital capabilities and the number of channels by which they engage their customers. Companies that can't do this, or that still depend on legacy technology platforms, will undoubtedly miss the mark and lose customers to their more forward-thinking competitors.

Organizations that want to build their own CCM solution face a daunting set of challenges, from centralizing customer data and assets to keeping up with new technologies and communications channels as they evolve. It's costly and time-consuming to do this. As a result, the odds of launching a homegrown CCM solution within a reasonable timeframe and without considerable capital expenditure are remote.

Instead of purchasing yet another set of technologies and dedicating technical staff to a project that will take time away from other objectives, organizations should focus on the results they desire. Implementing a leading edge CCM solution will result in improved communications, increased revenue and retention, and reduced costs and risk. Partnering with a CCM expert with a track record of delivering results is the most expeditious way to achieve those outcomes.



#### **A Better Solution for Customer Communications and Long-Term Growth**

As a hosted managed service solution, the Oceanus CCM platform unlocks data from your existing systems to create and deliver highly personalized and compelling interactive communications – bills, statements, marketing offers and more – across distribution channels that include print, email and SMS. Oceanus is an end-to-end solution that extends your capabilities to enable better customer interactions that protect your investment in customer acquisition for long term growth. Designed to return value fast, Oceanus delivers a return on investment in 90 days. To learn how you can dramatically improve your customer communications, [schedule a call](#) with one of our CCM experts.



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