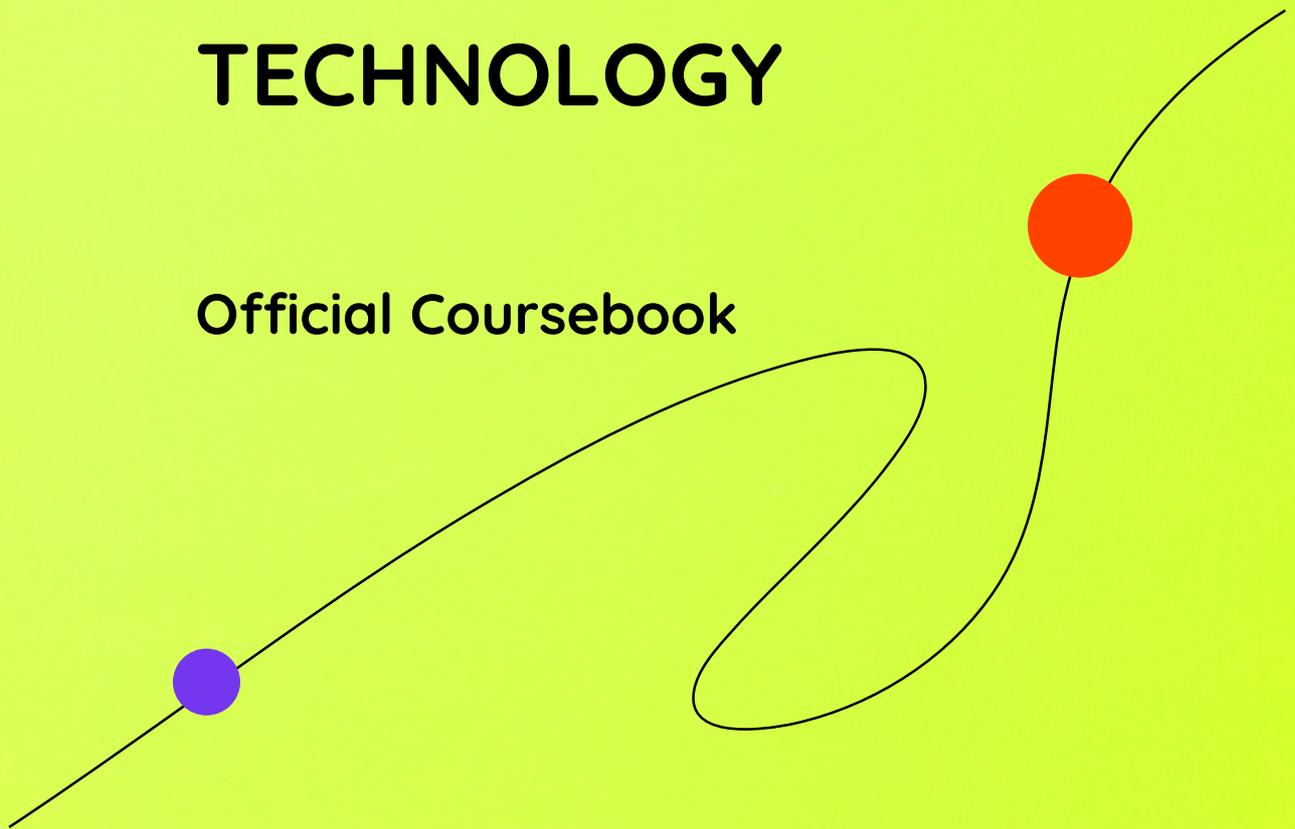quadient

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CCM 101:

A BEGINNER'S GUIDE TO CUSTOMER COMMUNICATIONS MANAGEMENT TECHNOLOGY

Official Coursebook

COURSE SYLLABUS

Lesson 1 **What is CCM?**
- Introduction
- CCM defined
- What is a communication channel?
- CCM capabilities

Lesson 2 **What CCM delivers that Marketing Automation Platforms don't**
- Complex variable data
- Industry regulations
- Interactivity
- Digital forms and processes
- Complex document management

Lesson 3 **Breaking silos & empowering business users**
- Overcoming data silos
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Lesson 4 **Connecting communications to the customer journey**
- Capturing moments that matter
- What is journey mapping?
- 6 best practices for journey mapping
- What are journey analytics?
- Connecting CCM to journey management

Lesson 5 **Making the right choice: hybrid vs. cloud communications**
- Trendspotting: an aggressive move to the cloud
- The 'land and expand' model
- Benefits of cloud deployments
- CCM as a hosted managed service
- What is any-premise CCM?
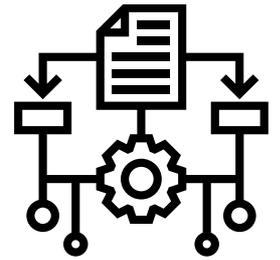
LESSON 1:
WHAT IS CCM?

Welcome to lesson 1 of CCM 101 – a free coursebook developed by Quadient.

This course was designed specifically for newcomers to the CCM world – folks who want to understand, in simple terms:

- **What is customer communications management (CCM) technology?**

- **What does it do?**

- **Who is it for?**

- **Why it's a critical component of your enterprise tech stack**

- **How it can empower your staff to deliver meaningful customer interactions across the entire customer journey**

Think of these lessons as the "Cliff's Notes" for understanding CCM technology. If you're already past the beginner stage of your CCM journey, simply pass this along to a friend or colleague who's just starting out.

Without further ado, let's get started.

INTRODUCTION

We all know that companies compete today based on customer experience. Today's customers want relevant, personalized communications that are available on-demand and accessible via the device of their choice.

But in this discussion, we're not talking about marketing communications that attract customers through social campaigns or digital ads. We're talking about all the interactions that occur after that – quotes, customer onboarding, contracts, welcome kits, bills, statements, upsell/cross-sell communications, and so on.

The truth is, once you've earned a new customer, the rest of the customer journey is even more important. And that's where many organizations fall short. Especially those in highly regulated B2C industries like insurance, banking, healthcare, government, and utilities. These complex enterprises face a number of challenges, including:

- **Legacy IT systems**

- **Operational & data silos**

- **Ever-changing regulations**

- **Lack of IT time and resources**

- **Pressure from nimble startups**

CCM DEFINED

According to Gartner,

"CCM technology supports the creation, management, and distribution of B2C or B2B customer communications. CCM applications create personalized, on-demand communications that support multi-experience distribution, often based on the recipient's preferences, rather than the senders. CCM solutions are primarily used in industries like insurance, banking, healthcare, and utilities to generate documents such as invoices, statements, correspondence, alerts/notifications, and marketing communications. These communications are often highly regulated and contain personally identifiable information (PII) such as account numbers, financial data, or health information. As a result, these systems provide a level of governance, auditing, and data security that is not always necessary in marketing-based communication platforms."

— Source: Gartner Market Guide for Customer Communication Management, 2021

WHAT IS A COMMUNICATION CHANNEL?

Channels are a means or outlet by which to deliver a message. Some examples include social media, email, physical mail or text messaging (SMS).

With CCM, regardless of the channel – mobile, web, SMS, email or print – the experience is the same.

CCM CAPABILITIES

Leading CCM solutions:

• **Have highly advanced design capabilities**

• **Handle complex variable data with ease**

• **Make keeping up with ever-changing regulations simple**

    • **Give business users the power to send personalized messages at any time of the day or night, on the customer's preferred channel**

• **Enable two-way interactions**

• **Break down organizational and digital silos**

• **Power complex busines processes such as digital onboarding**

And so much more. Some even provide contextualization with integrated customer journey management capabilities.

> # CHANNELS ARE A MEANS OR OUTLET
> # **BY WHICH TO DELIVER A MESSAGE.**

Think of all the interactions that take place after you have won a customer. How do they measure up?

• **Are they relevant, personalized, and accessible on-demand?**

• **Do they reflect positively on your brand?**

• **Are they consistent and compliant?**

• **Are they bi-directional?**

       • **Are they delivered via your customers' preferred channel? What if their channel preference shifts?**

• **Do they incorporate the knowledge of your subject matter experts?**

If you answered 'no' to any of these questions, you've made the right choice in reading this coursebook.

Lesson 2 will clarify where CCM fits within your existing tech stack.

LESSON 2:

WHAT CCM DELIVERS THAT MAP'S DON'T

Complex enterprises have sophisticated communication requirements. Marketing Automation Platforms are an important tool in nurturing the customer through the buying phase of their journey – when communications are simple and straightforward.

But once the prospect becomes a customer, that's when things get a little more complicated. And that's where CCM shines.
Here's why:

COMPLEX VARIABLE DATA

Industries like banking, insurance and healthcare are data rich. From personal records and information to account activity and transaction history, the data is stored across a number of disparate core systems.

The job of CCM software is to pull complex data from everywhere, and organize it into highly personalized, easy-to-navigate communications.

Picture this: as a banking customer, you've requested that your account statement be delivered each month via text message. You click on the link and your account statement opens up in the mobile app, complete with interactive charts that show you how much you spent on food and entertainment, and how much you saved this month.

INDUSTRY REGULATIONS

Compliance standards are changing every day and vary widely across regions. Many organizations struggle to keep up with changing regulatory requirements to avoid the growing financial penalties of noncompliance.

How do you ensure the correct regulatory language is included in every communication that goes out?

The key is to involve the compliance function in the design and development of customer communications from the very beginning.

This is only done through a CCM solution that enables:

Collaboration: legal and compliance teams take ownership over regulatory content blocks that will be leveraged across the communications portfolio. Content blocks are locked down to safeguard regulatory language.

A holistic view: compliance teams require a full view of the entire communications package in every form in which it will appear (mobile, web etc.).
Greater control: compliance teams require the ability to manage, track, audit and approve regulatory language quickly and easily.
Can your marketing automation platform do that?

INTERACTIVITY

By integrating with existing core systems, leading CCM solutions help companies transform their existing account statements, reports, contracts, and bills into personalized, responsive experiences that include interactive tables, charts and upsell/cross-sell messages.

DIGITAL FORMS AND PROCESSES

CCM makes onboarding for new products and services easy by providing digital application flows with forms that are pre-populated with customer data. Then, customers are able to quickly sign contracts using any device with integrated e-signature capabilities.
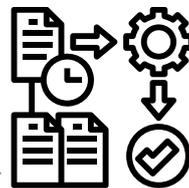
COMPLEX DOCUMENT MANAGEMENT

From investment portfolio packages, to welcome kits, contracts, EOB's and policies, many organizations struggle with complex document assembly and delivery. CCM solutions make it simple to create, assemble, manage and track complex documents from one centralized hub, and deliver them across all channels.

They allow full control over the complex relationships between different types of content, document order, compliance messaging, and more.

The result? Your customer receives a personalized, interactive, easy-to-read information package via their channel of choice, complete with sortable tabs, interactive charts and graphs, and built-in e-signature capabilities.

These are all functionalities you can take advantage of with a modern CCM platform.

In our next lesson, we'll shift gears and talk about how CCM platforms can be used to break down departmental, channel, and data silos, and empower business users to make meaningful, timely connections with customers.

MANY ORGANIZATIONS STRUGGLE WITH COMPLEX DOCUMENT ASSEMBLY AND DELIVERY. CCM SOLUTIONS MAKE IT SIMPLE TO CREATE, ASSEMBLE, MANAGE AND TRACK COMPLEX DOCUMENTS.

BREAKING SILOS AND EMPOWERING BUSINESS USERS

Many large organizations still have separate teams dedicated to creating customer communications for mobile, print, SMS, email, web, and so on. Some rely on third parties to support communications across specific channels. These teams aren't collaborating and may not be sharing content, which leads to:

• **A fragmented and inconsistent customer experience**

• **Duplication of efforts**

• **Inefficiency**

• **Elevated compliance risk**

• **Inconsistent branding and messaging**

There is a better way.

In this lesson, we will examine how today's leading CCM solutions help large organizations overcome three critical silo challenges:

1. Data silos

2. Channel silos

3. Organizational silos.

1. OVERCOMING DATA SILOS

Most large organizations have a complex infrastructure of mission-critical legacy IT technology. For many, these disparate core systems are far too costly to remove or upgrade, but the data they house is extremely valuable. When it comes to data, organizations like banks and insurance companies are sitting on a goldmine. They have access to billions of data points on their customers that can be leveraged to engage in a highly contextualized manner.

The key to delivering a personalized customer experience lies in the supporting technology and its integration capabilities. Leading CCM solutions can pull data from anywhere within your existing data ecosystem, so your non-technical business users can create and deliver highly personalized interactions across all channels.

2. OVERCOMING CHANNEL SILOS

Year by year, project by project, and trend by trend; many organizations have assembled a large collection of channel-specific or project-specific marketing and customer communications technologies. What seemed to be a series of easy solutions to isolated problems, in many cases, has morphed into a tangled mess of technologies that hurts the customer experience.

Today's CCM solutions eliminate the need to develop channel-specific messages independently from one another. With a centralized CCM platform, approved templates, content blocks, branding elements, and regulatory language are stored centrally and leveraged across all channels. When there is a change – for example, a new logo – the update is made once, and propagated across all channels.

In the case of Quadient's solutions, communications are designed in a channel-agnostic way. Once the communication has been created, the omnichannel preview allows you to see how the communication will appear to the customer on their preferred channel – for example, on mobile, email, or print.

3. OVERCOMING ORGANIZATIONAL SILOS

In the past, when IT was the only department involved in developing systems, it led by default and maintained control. However, as the business has become more digital, it's now the business users that must dictate how things should be done, with the IT department often acting as an enabler.

In order to create and deliver timely, relevant, and personalized messages, business users require the ability to take ownership of communications with intelligent workflows connecting various stakeholders.

CCM platforms make it easy for business users to create, edit and manage content, instead of relying on IT to make changes.

• Content authors can design communications according to branding and personalization rules and use approval workflows to ensure compliance.
• Business administrators specify which templates may be accessed by whom, what types of changes are allowed to be made, and define approval rules and workflows.
• Prior to delivery, business users such as front office employees are given access to pre-defined content blocks through an easy-to-use web editor to add a personalized touch.

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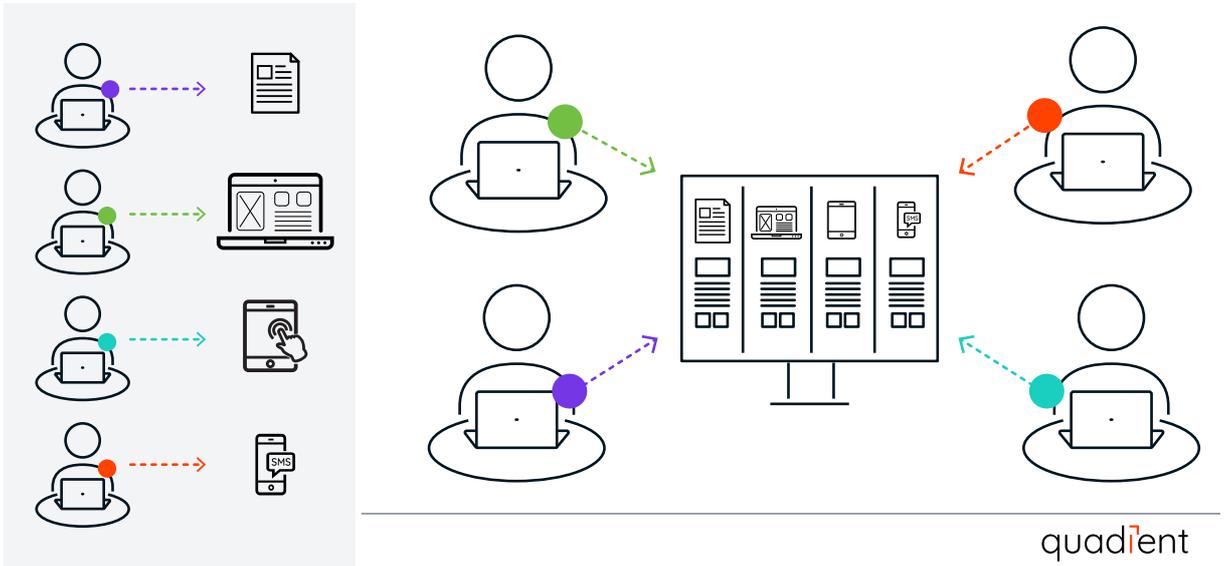
Large organizations send millions of customer communications each month, which are potentially based on thousands of templates. Managing change for these document templates can be costly and time-consuming, so it's clearly a win-win to offload these responsibilities to the business.

Executives are advised to select a CCM platform that enables people in the business to easily create, edit and manage content, instead of relying on IT.
In Lesson 3, we'll take what we've learned about CCM and explore how it can be applied in the context of the overall customer journey.

SELECT A CCM PLATFORM THAT ENABLES PEOPLE IN THE BUSINESS TO EASILY CREATE, EDIT AND MANAGE CONTENT, INSTEAD OF RELYING ON IT.

CONNECTING COMMUNICATIONS TO THE CUSTOMER JOURNEY

CAPTURING MOMENTS THAT MATTER

When it comes to the customer experience strategy, business-critical customer communications such as account statements, quotes, and contracts are often one of the most overlooked, yet critical components of the customer journey.

With these communications, rarely does the voice of the customer get incorporated into design and delivery. But these necessary customer communications aren't going away.

It's critical to capture these communications into your journey maps as they are often key 'moments of truth' for your customers. For example, if there is a poor insurance claims experience, then there is a high probability that the customer will take their business elsewhere. Poor communications can impact you in the form of increased call volumes and customer churn.

WHAT IS JOURNEY MAPPING?

A journey map is a visualization of the process a customer goes through in order to accomplish a goal. Customer journey mapping helps ensure that you're aware of where and how to best deliver these communications to ensure they meet your customer's expectations.

6 BEST PRACTICES FOR JOURNEY MAPPING

Done right, journey mapping is a powerful tool. Here are six best practices to follow to ensure your journey maps are actionable and transformational:

1. Use a cloud-based mapping tool. Digital tools facilitate sharing and collaboration

2. Bring the journey to life. Bring into the map any documents, images, audio, or video files to bring your customer journey to life.

3. Connect all the dots. Make sure you capture all communications the customer receives throughout the journey.

4. Go detailed. The more we know, the better we understand.

5. Assign ownership. In order to drive accountability and action, assigning owners to each of the steps is critical.

6. Connect to other systems. The journey mapping tool should pull data from other systems to provide actionable insights.
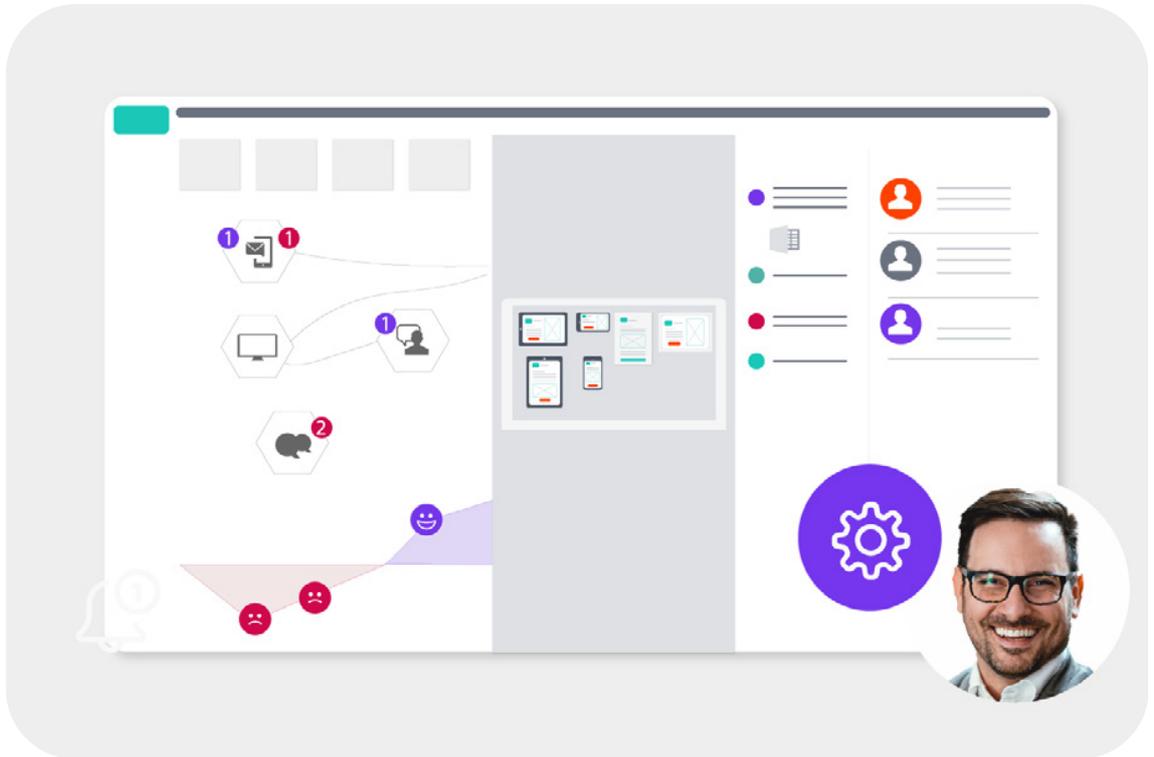
WHAT IS JOURNEY ANALYTICS?

Gartner defines customer journey analytics as, "The process of tracking and analyzing the way customers and prospects use a combination of available channels to interact with an organization over time. Its goal is to help organizations deliver optimal customer experiences, across touchpoints, by providing cross-functional teams with the 360-degree insights needed to execute it."

CONNECTING CCM TO JOURNEY MANAGEMENT

Gone are the days when the one-size-fits-all customer journeys drive value. CX-obsessed companies – those built on a customer-first culture – have raised the standard. Every interaction a customer has with your organization is now an opportunity to delight or disappoint.

To make meaningful improvements to your overall customer experience, your CCM solution must enable you and your team to:

1. Ensure all communications, regardless of the channel, deliver a seamless experience to the customer.

2. Connect every touchpoint to a cloud-based customer journey management solution that allows you to:

Visualize: create dynamic journey maps that offer a living, breathing dashboard of customer emotions
Inform: connect data from every touchpoint for deep insights into each customer's needs and track metrics for real-time improvement
Prioritize: act on critical moments with advanced task visualization to prioritize changes with the biggest impact
Communicate: empower business users to drive value through customer communications
Our next and final lesson will explore two deployment options for CCM – hybrid and cloud communications as well as provide tips on how to make the right choice for your business.

MAKING THE RIGHT CHOICE – HYBRID VS. CLOUD COMMUNICATIONS

TRENDSPOTTING: AN AGGRESSIVE MOVE TO THE CLOUD

In the 2021 Market Guide for Customer Communication Management, Gartner predicts, "by 2023, over 75% of all customer communication management implementations will be cloud or hybrid solutions."

Since the emergence of public cloud infrastructure in the late 2000s, enterprises have been gradually shifting their IT infrastructures and software applications to the cloud. Now that public cloud service providers such as AWS and Microsoft Azure have become more mature, better regulated, and more affordable, industry experts including Gartner, IDC, and Forrester are seeing a strong acceleration of CCM software to the cloud.

Aspire Customer Communications Services, found that 29% of U.S. enterprises have projects underway to migrate outdated CCM-IT infrastructure to modern, SaaS platforms.

"There is a general consensus by CCM industry followers that we've reached a tipping point and that cloud adoption will now overtake on-prem deployments going forward."

—Kaspar Roos, CEO & Founder, Aspire Customer Communications Services
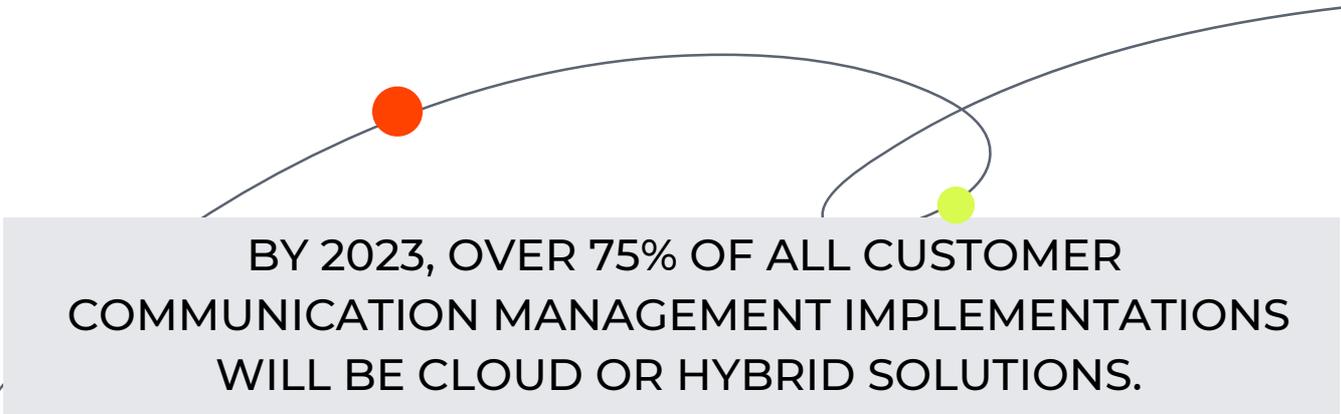
BY 2023, OVER 75% OF ALL CUSTOMER COMMUNICATION MANAGEMENT IMPLEMENTATIONS WILL BE CLOUD OR HYBRID SOLUTIONS.

THE 'LAND AND EXPAND' MODEL

New corporate buyers in marketing, digital transformation, and customer experience have different needs than traditional IT buyers, and they are more likely to buy CCM software as a subscription. Aspire found that customer experience-focused organizations are three times more likely to buy CCM to start small, experiment, and then scale up once successful.

An example would be turning paper-based onboarding into a next-gen digital process that leverages the latest digital identity services, intelligent forms, personalized videos, and digital signatures, and integrates with a cloud-based CCM system to manage and track interactions in a scalable and compliant manner.

BENEFITS OF CLOUD DEPLOYMENTS

Today's best-in-class CCM hybrid and SaaS solutions offer fundamental benefits, including:

Agility. Your teams can communicate efficiently from anywhere in the world to streamline the creation of secure communications where and how your customers demand.

Increase value fast. Cloud-based solutions can transform the customer experience in days, so you don't have to wait 12 to 18 months to get value.

Infinitely scalable. Managed Services in the cloud are often simple, flexible solutions capable of powering businesses of any size with infinite scaling ability.

Reduce IT overhead. Unlike on-premise deployments, enterprises' cloud-native environments are installed and managed by the service provider, reducing the need to commit your often over-extended IT resources.

While technology experts such as Gartner, Forrester, and IDC agree that cloud communications are the future, the reality is that some enterprises are not quite ready to move everything to the cloud. Thus, it's critical to select a CCM solution provider that offers flexible deployment options that align with your current and future business needs.

IT'S CRITICAL TO SELECT A CCM SOLUTION PROVIDER THAT OFFERS FLEXIBLE DEPLOYMENT OPTIONS THAT ALIGN WITH YOUR **CURRENT AND FUTURE BUSINESS NEEDS.**

CCM AS A HOSTED MANAGED SERVICE

For companies who want to remove the hassle of managing a CCM application or its hosted infrastructure, choosing a vendor that offers CCM as a Hosted Managed Service is a great option.

When you chose CCM as a Hosted Managed Service (HMS), a team of experts handles migrations, updates, optimization, and application management, letting you transform customer communications while reserving IT resources for other key business competencies. Deployed in a dedicated instance in the cloud and managed by application experts, HMS allows you to focus on execution without having to worry about the technical complexities of operating and maintaining the software yourself.

WHAT IS ANY-PREMISE (AKA ANY-PREM) CCM?

Full disclosure: Quadient is the only any-premise CCM solution in the world. Any-premise means that CCM implementations can happen in any environment – on-premise, cloud, HMS, or a hybrid of these – and allows you to migrate applications, content, and infrastructure between them as needed. It gives you the exclusive flexibility to manage deployments that make sense for your business now and in the future.

The biggest advantage is that you eliminate the need for fortune tellers to gamble on what 2034 will demand.

Any-prem deployment gives you the freedom to commit to your most viable solution today without committing to an architecture that will be redundant tomorrow. It's the long-game play for success. So, as you finally start running with the green light, choose a CCM provider that gives you flexibility and has a track record of rapidly incorporating new options into the solution.

QUADIENT IS THE ONLY ANY-PREMISE CCM SOLUTION IN THE WORLD.

LET'S RECAP OUR KEY LEARNINGS FROM THE LAST 5 LESSONS:

1. You've gained a foundational understanding of CCM technology, its capabilities, and its benefits

2. You've uncovered the fundamental differences between CCM and MAPs

3. You've learned how CCM solutions can help to eliminate data, channel, and organizational silos

4. You've discovered how customer communications can be connected to journey management activities to drive meaningful CX improvements

5. You've explored the evolution of CCM from on-premise to hybrid or cloud deployments and the benefits, including agility, scalability, and go-to-market speed.
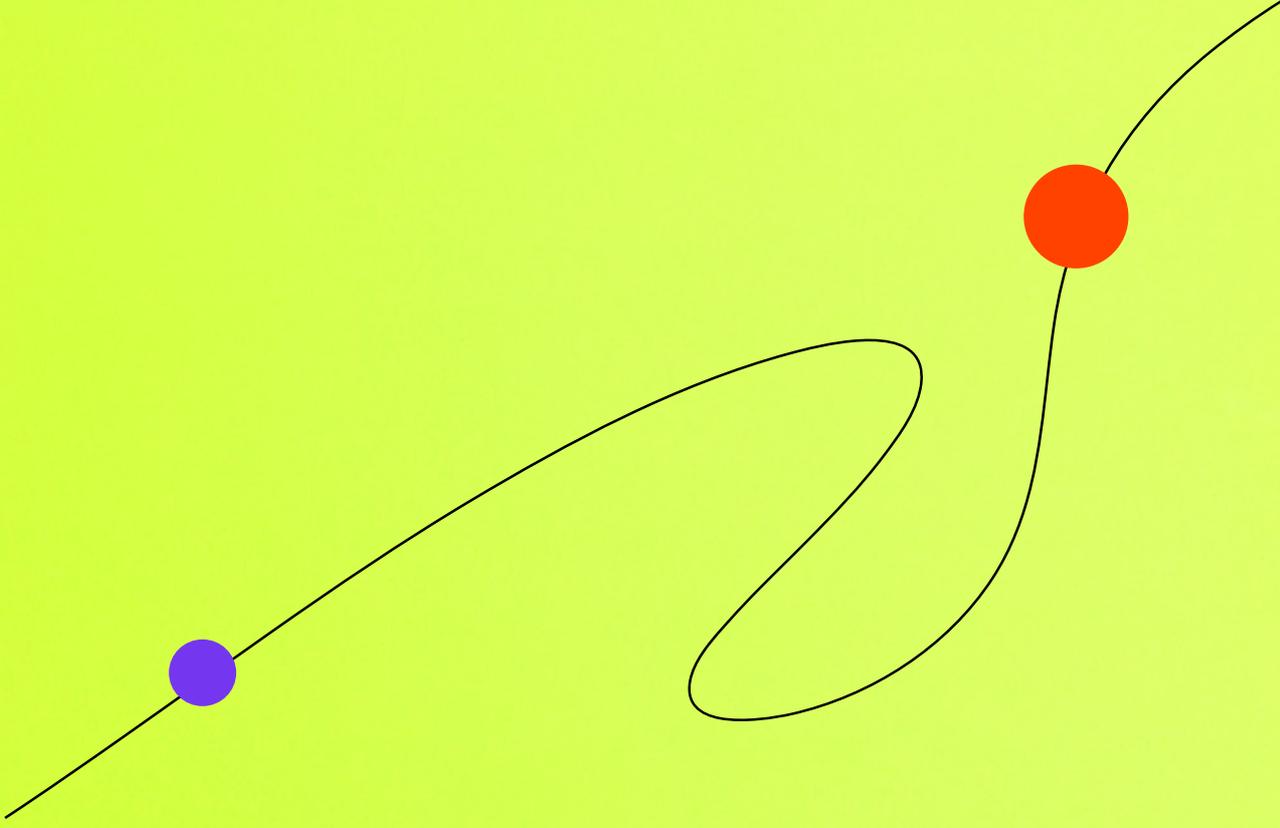
CONGRATULATIONS!
You've now officially moved beyond the 'beginner' phase of your CCM journey.

Ready to learn more? Want to see CCM in action?

Contact us today for a demo of our award-winning solutions.

quadient.com/en/request-demo

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Because connections matter.

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About Quadient®

Quadient is the driving force behind the world's most meaningful customer experiences. By focusing on three key solution areas including Intelligent Communication Automation, Parcel Locker Solutions and Mail-Related Solutions, Quadient helps simplify the connection between people and what matters. Quadient supports hundreds of thousands of customers worldwide in their quest to create relevant, personalized connections and achieve customer experience excellence. Quadient is listed in compartment B of Euronext Paris (QDT) and is part of the CAC® Mid & Small and EnterNext® Tech 40 indices.

For more information about Quadient, visit quadient.com.