

## Six important steps for a successful customer communications transformation



## Contents

### Six important steps for a successful customer communications transformation

The need for transformation .....	3
What is customer communications management? .....	4
1: Moving from multi-channel to omni-channel communications .....	5
2: Evolving a digital first approach .....	6
3: Dealing with legacy .....	7
4: Creating a single customer view .....	8
5: Personalizing communications .....	9
6: Handling GDPR compliance .....	10
Macro 4: working with business to transform customer communications .....	11

## Six important steps for a successful customer communications transformation

### The need for transformation

The rapid adoption of new channels such as mobile and social media has turned our relationship with customers on its head: it is the customer who is now in control. Customers decide when and where they will do business with you, and if they cannot do it right now, on a smartphone, they might go elsewhere.

Customers can make or destroy your brand within hours with a social media share that goes viral. And following a major shakeup of European data protection law, the General Data Protection Regulation (GDPR) came into effect in May 2018, bringing a new challenge: private individuals now have greater powers to control the data that informs your marketing and customer communications.

Businesses have more to gain – and lose – than ever before. The internet, social media and mobile apps allow companies to interact directly with an unprecedented number of people and to create new markets and business models, unrestricted by the old barriers to entry such as geography and high start-up costs. But these same freedoms have also given rise to new competitors who are waiting in the wings, ready to take over if an established player slips up.

**The ‘what, where, when and how’ of communicating with customers must be transformed in order to thrive in this new reality.**

This white paper discusses six important steps for companies as they follow their transformation journey, and explains how customer communications management (CCM) technology can help them along the way.

In the words of Forrester, a leading research and advisory firm, customer communications management solutions ‘are used to compose, format, personalize, and distribute content to support physical (i.e. paper) and electronic customer communications and improve the customer experience.’

Customer communications software centralizes control, tracks progress and helps you to take corrective action if things go wrong. A customer communications management system should also make it easier to introduce new channels and integrate them seamlessly within your existing communications landscape.



## 1: Moving from multi-channel to omni-channel communications

Most companies today communicate with their customers using multiple channels – but not always in a joined up way. A marketing team sending out printed, email, text and social media communications as part of a multi-channel campaign will achieve limited success if they are operating in isolation from the rest of the company. In order to step up from multi-channel to omni-channel communications, companies must handle interaction seamlessly as the customer passes from one channel or department to another, and take the whole journey into account to ensure that any marketing offers are relevant and timely.

In practice, however, departments and even product areas within the same business may interact with customers independently of each other, using a range of different, disconnected IT systems and communication channels.

To customers this appears anything but seamless. Communications from the same company are coming at them in a confusing, un-coordinated way. Letters, emails and other documents from different departments may not even have the same look and feel. And if a customer interacts with, say, the contact center, it is likely that the person they are speaking to will be unaware of all the correspondence sent to or received from different parts of the business.

A centralized customer communications management platform supports a more consistent approach by allowing you to create, view and manage all of your communications and digital marketing assets in one place, together with the business rules that determine what should be sent to whom, and when. You can see if communications are being successfully delivered, and take action if there's a problem.

Integrated communications can be produced by combining content from different areas around the business. For example, a single statement could be created for all of a customer's product holdings, even if the source data is stored on several different IT systems.

## 2: Evolving a digital first approach

Communications professionals recognize the need to move on from using conventional printed documents as the starting point for digital communications. After all, digital offers so much more scope for engagement if you are able to unlock its full potential. The challenge is to think about how a message works best on each of your digital channels, and build unique content for each one.

Customer communications management software allows you to take ‘raw’ content – from a sales letter, delivery confirmation or subscription reminder, for example – and repurpose it to whatever works best for a variety of different channels. The same basic content could be turned into a one line text message, a responsive email (that works across computers/tablets/mobile phones) and the script for a chatbot conversation.

The technology also lets you exploit the additional opportunities that digital channels give you, to add value and build rapport. You can make use of new formats to turn static documents into something more interactive and therefore much more engaging.

For example, in the case of a bank statement or energy bill, you could insert bespoke charts and graphs that customers can click to view their spending or usage patterns, and then extract their data into a budgeting tool for further analysis.



### 3: Dealing with legacy

Many older business systems produce important documents that are still used today – everything from reports, contracts and correspondence, to statements and shipping notes. Originally designed for print, these documents are often in fixed formats that are difficult to modernize, whether that means adapting them to work with digital channels, adding personalized messages, or simply updating the appearance to reflect current corporate branding.

Making the necessary changes to the legacy system itself can be costly, risky and, above all, time consuming. Replacing the legacy system completely is rarely practical if you want to improve communications now, rather than months or years down the line.

Customer communications management software offers another alternative, which is to revamp legacy content outside of the legacy application. This approach is much quicker as it avoids having to update or replace the original application.

Take the example of a simple customer statement comprising lines of text in an old, fixed format. You could bring that document into a customer communications management system and rebuild it to look exactly the way you want. It could be automatically transformed into an email or other digital format, and business rules could be used to insert new content such as a personalized marketing offers based on the customer's current spending patterns.



## 4: Creating a single customer view

Real transformative communication happens when the customer feels genuinely understood and receives a truly personal service every time they interact with your business. Creating this kind of understanding is a continuing commitment that few companies have completely mastered. It involves creating a complete picture of a customer's every interaction with your organization, as well as understanding their behavior and preferences: the much coveted single customer view.

Unstructured information – in the form of customer communications such as documents, emails, text messages, social conversations, and chat interactions that exist outside of formal databases – are an increasingly significant part of that view. Indeed, unstructured information accounts for over 80 per cent of all corporate data and, as the name implies, bringing it together in one place can be challenging as it comes in diverse formats, from many different sources.

Customer communications management systems are underpinned by an information hub or digital vault that is designed to store this information and categorize it by customer, to provide a complete history of all inbound and outbound customer communications.

For example, if a customer starts a conversation via chat, sends an email and then phones the contact center, the detail of those interactions becomes part of the single customer view. A customer service agent can pick up the conversation and continue seamlessly at the next interaction, delivering a better customer experience that leaves the customer feeling valued.





## 5: Personalizing communications

It is widely accepted that personalized communication is more effective. Why else do personalized emails and ads get more opens and click-throughs? But maintaining a personalized approach when juggling multiple channels and interacting with a large, diverse mix of customers is far from straightforward.

**A customer communications management system can help you to build personalization into your communications by using rules-based automation in a variety of ways, including:**

- Adding personalized messages to transactional documents such as bills, statements and delivery confirmations
- Triggering personalized communications in response to customer actions or other events such as a reply to a text message or tweet, a web form completion or a milestone such as a customer returning to place an order after a long time
- Integrating with customer analytics and profiling systems to drive personalized communications across multiple channels.

Importantly, a customer communications management system can successfully integrate automation with human interaction, creating personalization at scale while ensuring the human touch is still there when necessary. While event-based communications and artificial intelligence chatbots can handle the majority of simple customer interactions, you can build a process to escalate queries to customer service agents when they become more complex or specific.



## 6: Handling GDPR compliance

Data is the currency of effective customer communications, but companies can no longer take it for granted. The GDPR, which took effect on May 25, 2018, gives private individuals greater rights over their personal data. EU residents are able to contact any organization that is holding their personal information to request access to it, and to have it erased or transferred to another supplier. The GDPR forces companies to pay more attention than ever to data privacy and security and to be more transparent about how personal information is used, with tough sanctions for non-compliance.

More than a legal obligation, the GDPR also presents an opportunity to build public trust in your approach to protecting customer data and your respect for individual data privacy. Research conducted by Macro 4 suggests that 41 per cent of UK consumers are more likely to do business with companies that are more transparent about the way they are using personal information.

In addition to enabling the relevant and timely communications that are expected by customers in exchange for granting access to their personal data, customer communications management systems are underpinned by secure, tamper-proof storage systems that allow the large mass of unstructured content flowing through your organization to be classified and managed correctly in line with GDPR requirements.

Having central visibility and control of customer information in this way greatly simplifies the process of responding to GDPR information requests and makes it easier for customers to view their own data.

Knowing what data you have, the individual it relates to and where it is held is key. It is the starting point for implementing rules and policies to ensure personal information is managed and stored in a GDPR-compliant manner. If your customer data is stored in a customer communications management system, you can make GDPR compliance easier by setting automatic retention and deletion rules, monitoring data access by internal company users, customers and business partners, and incorporating additional security processes such as encryption.

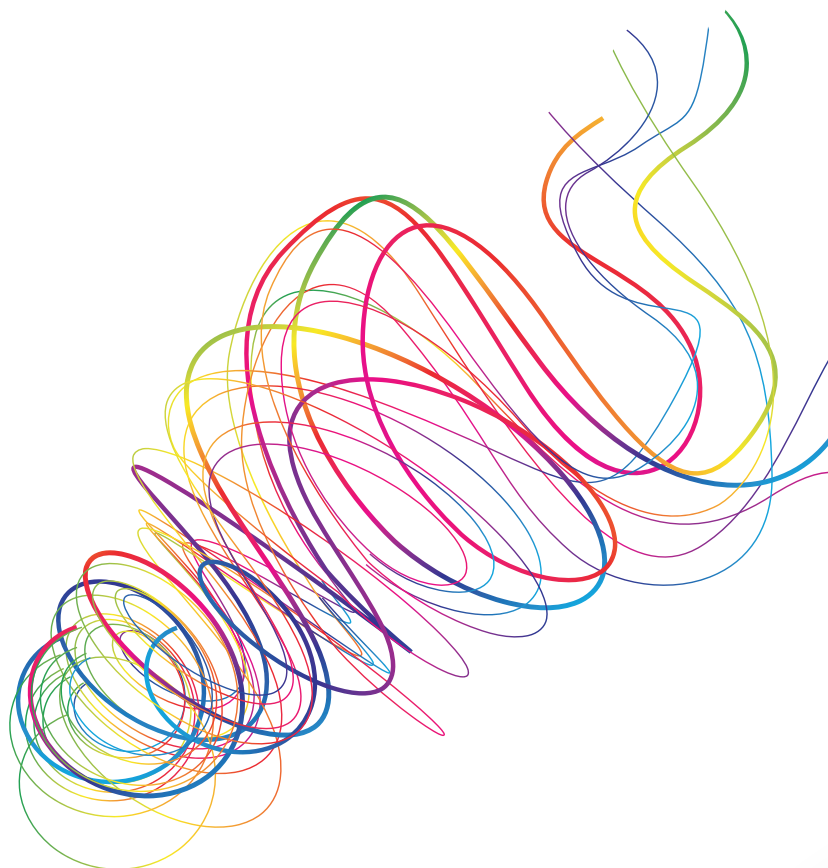
## **Macro 4:** working with business to transform customer communications

Macro 4 has over ten years' experience of implementing customer communications management solutions for companies operating in a broad range of industry sectors, including both business-to-business and business-to-consumer environments.

Macro 4's Columbus software suite enables you to deliver personalized, multi-channel communications on an enterprise scale, without making any changes to your business systems. Our highly automated yet individualized approach is helping Macro 4 clients to attract and retain more customers, at lower cost.

**To learn more please visit [www.macro4.com](http://www.macro4.com)**

Email: [market@macro4.com](mailto:market@macro4.com)





#### **Macro 4 Headquarters**

The Orangery  
Turners Hill Road  
Worth, Crawley  
West Sussex  
RH10 4SS  
United Kingdom  
Tel: +44 1293 872000  
Email: [market@macro4.com](mailto:market@macro4.com)  
[www.macro4.com](http://www.macro4.com)

#### **Belgium**

Tel: +32 15 74 74 80  
Email: [market.be@macro4.com](mailto:market.be@macro4.com)

#### **France**

Tel: +33 1 79 71 84 50  
Email: [market.fr@macro4.com](mailto:market.fr@macro4.com)

#### **Germany**

Tel: +49 89 6100970  
Email: [market.de@macro4.com](mailto:market.de@macro4.com)

#### **Italy**

Tel: +39 2 213 1941  
Email: [market.it@macro4.com](mailto:market.it@macro4.com)

#### **Netherlands**

Tel: +39 20 5206874  
Email: [market.nl@macro4.com](mailto:market.nl@macro4.com)

#### **Spain**

Tel: +34 91 443 0220  
Email: [market.es@macro4.com](mailto:market.es@macro4.com)

#### **Switzerland**

Tel: +41 44 723 40 00  
Email: [market.ch@macro4.com](mailto:market.ch@macro4.com)

#### **USA**

Tel: +1 973 526 3900  
Email: [market.usa@macro4.com](mailto:market.usa@macro4.com)

## **About Macro 4**

Macro 4, a division of UNICOM Global, develops software solutions that accelerate business transformation. Macro 4's cross-platform enterprise information management solutions make it easy for companies to go digital, personalize customer communications and unlock the value of their corporate content. Macro 4 solutions for application lifecycle management, session management and performance optimization are used by many of the world's largest enterprises to modernize their mainframe applications and development processes. UNICOM Global operates across all geographic regions and offers deep in-house resources and flexible IT solutions to customers worldwide.

**For more information on Macro 4 products and services visit [www.macro4.com](http://www.macro4.com).**

Trademarks and registered trademarks: [www.macro4.com/trademarks](http://www.macro4.com/trademarks)  
Copyright 1995–2018 All Rights Reserved. Macro 4 – a division of UNICOM Global.

UNICOM® Systems, Inc.  
UNICOM Plaza Suite 310, 15535 San Fernando Mission Blvd., Mission Hills, CA. 91345 USA  
Tel: +1 818 838 0606 Fax: +1 818 838 0776 [www.unicomglobal.com](http://www.unicomglobal.com)

