



Customer Communications Management Software:

A Vital but Often Overlooked Piece of Digital Customer Experience Platforms

The Need for Consistent Communications Across Customer Journeys

As CX leaders demonstrate through their increased CX scores and revenue, brand consistency is no longer a nice-to-have. It's required. If the look and feel across your digital delivery platform are different — with varying layouts, inconsistent styles, etc. — then you risk looking unprofessional or lacking attention to detail. And if your attention to your brand seems shoddy, what does that say about your products and services?

To achieve consistency, you need digital experience delivery technologies that can all draw upon the same assets, including reusable objects, layouts and style sheets. It's about creating consistent-looking (in terms of structure and styles) and -sounding (in terms of content and tone) communications across customer journeys.

Customer Communications Are Part of Every Customer Journey

Think about all the touchpoints your company has with your customers; consider when and why they are interacting with you, through what channels and with what goals and expected outcomes. Research from leading analyst firms clearly indicates that the level of quality, consistency, contextualization and personalization of your customer-facing communications can have a dramatic effect on customer experience — as evidenced by the brands that improved their Forrester Customer Experience Index scores the most.

Now think about the software you are using to serve each touchpoint and channel. Chances are you have software suites serving marketing, like email marketing automation, social media dashboards, and digital asset management (DAM) systems. You very likely also have technologies to help you provide ongoing customer service, perhaps including call center management systems, a customer self-service web portal and a customer relationship management (CRM) system. And you probably have still more applications for ecommerce, like product information management (PIM) systems, site search capabilities, and billing and payment services. The goal of great customer experience (CX) is to deliver a consistent, positive, personalized customer experience across any and all [channels and touchpoints](#), including giving [balanced attention](#) and resources to marketing, commerce and customer service.

How well integrated are all of those applications? Are you providing a consistent, contextual and personalized customer experience throughout the entire customer lifecycle and across all departments in your organization?

THE CUSTOMER LIFECYCLE IN FOUR STEPS:



Acquisition



Onboarding



Service



Loyalty/Retention

CCM's Place in the Modern Digital Experience Architecture

The large software portfolios we call digital experience (DX) platforms (like those offered by Salesforce, Adobe, etc.) aren't one-size-fits-all solutions. They're really more like frameworks that provide many of the pieces enterprises need to manage customer experience through digital channels. Every organization will need to customize and balance their CX management technology architecture by integrating other solutions that address weaknesses and gaps in the off-the-shelf DX platforms they adopt. And it turns out that customer communications management (CCM) software, which serves customers at multiple touchpoints throughout the customer lifecycle, is a glaring omission from most of the leading DX platforms on the market.

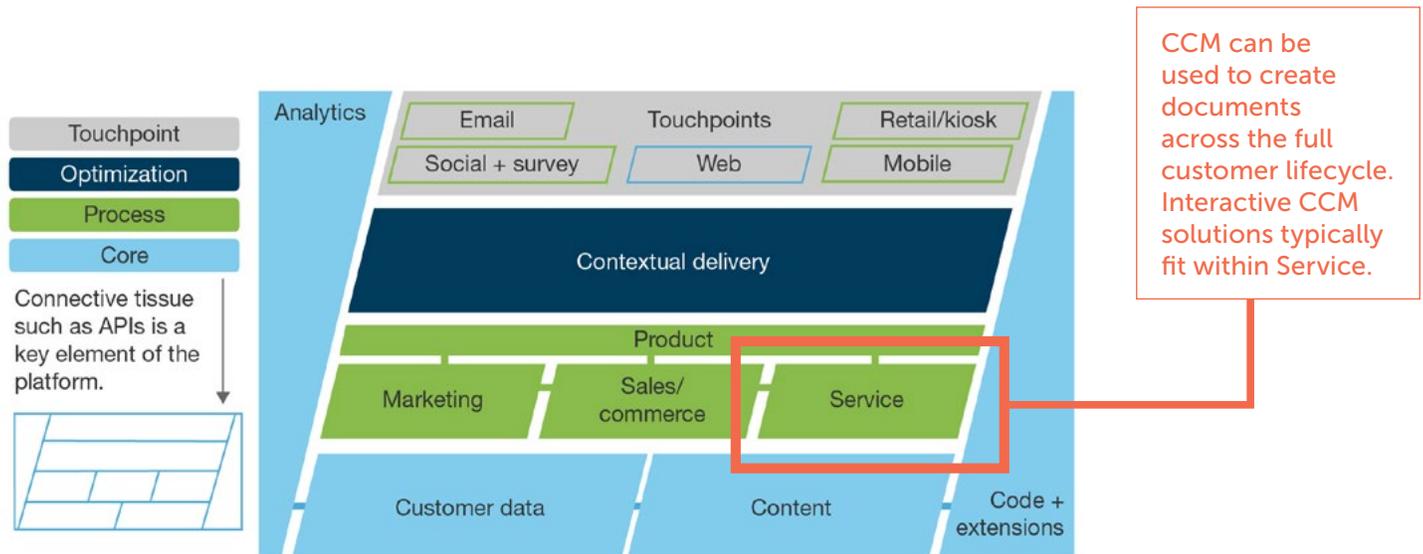
What almost everyone has overlooked is that the inherent strengths of CCM — deep personalization capabilities, cross-functional data and content sharing, tracking/auditing, and more — can make it a centerpiece of customer experience delivery. At the least, it deserves equal citizenship in the DX architecture. The only reason it isn't there is because CCM came from the world of batch oriented print-and-mail workflows and operational thinking. But now that CCM vendors are serving omni-channel customer communications needs, we are adapting very quickly to the needs of a digital-first world. Some vendors (and practitioners) are doing better than others, and it all comes down to who is really putting the customer at the center of customer communications.

Early on in Topdown's evolution to the customer experience mindset and digital experience architecture, we'd incorporated future-friendly features like channel-independent file formats, reusable blocks of content, contextualization based on data, real-time communications generation, and deep tracking and auditing capabilities into our CCM solutions. But we're continuing to watch trends and respond to our customers' changing needs, like the mass movement to the cloud, the drive toward interconnectedness, and the deeper fusion of microservices-based software into a true platform — which will inevitably bring CCM fully into the DX platforms of the future.

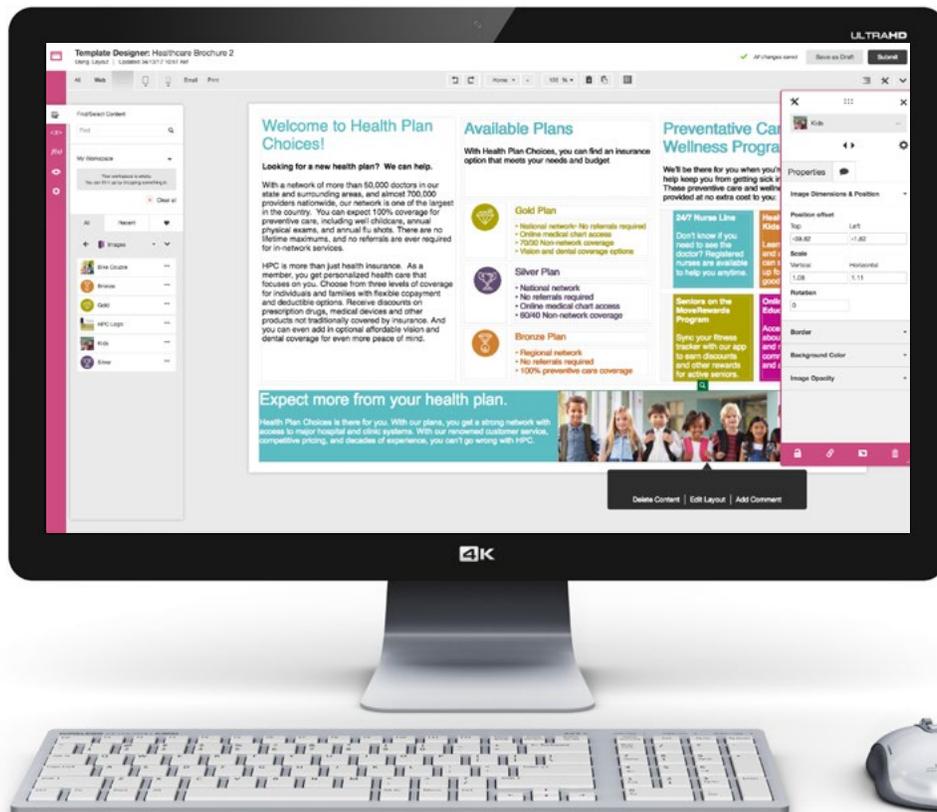
FORRESTER® RESEARCH

Forrester's Digital Experience Platform Architecture

The Integration Imperative Of Digital Experiences



Note: Some ecosystems, such as advertising and social, have a tenuous relationship with DX today and are therefore not depicted. Conversely, insights are so heavily intertwined with DX that they are depicted as part of analytics, customer data, and optimization.



Research Makes the Case for Integrated, Cloud-based CCM

As a company focused exclusively on customer communications management, Topdown has been paying very close attention to companies' CCM needs for nearly four decades now, always striving to meet or exceed expectations. To that end, in early 2015, we commissioned our own [study](#) with Forrester to confirm and quantify the primary customer communication-related pain points and solidify our understanding of what business users need from us and [INTOUCH®](#), our cloud-based CCM solution — which is the first all-new CCM solution to come to market in many years.

Our study focused on how, and how well, organizations manage customer-facing communications across entire customer journeys spanning the full customer lifecycle. Even though companies have invested a great deal in recent years to improve customer experience, [our research](#) shows there are still gaps between the people, processes and technologies that design and deliver communications to prospective and existing customers.

These gaps produce inconsistencies in:

- › **Branding** – Different logos, fonts, and styles creep into customer-facing communications
- › **Language** – Terminology and instructions vary from one touchpoint to the next
- › **Design** – Layout, look, and feel change from one communication to another
- › **Contextualization** – Some communications take advantage of context, but others don't
- › **Personalization** – One communication is sent to a person, the next to a persona
- › **Channel** – Not all departments can access customer's preferred communication channel

Not surprisingly, we found that people, processes and technology must align around the customer, with senior management leading this initiative across the enterprise. This speaks to the need for a comprehensive customer experience strategy that can guide technology purchase decisions.

Take CCM to the Cloud... and Beyond

The next big shift that's needed to make CCM an equal citizen with the rest of DX is to take it to the cloud. It's time to change how we think about the role of CCM in enterprise architecture. We have to get it out of the operational silo where it has traditionally lived and stop thinking of it as merely a cost center. It needs to take its place as a vital part of customer experience management, not a bolt-on or afterthought to the DX platform. And it needs to be future-ready, business-user friendly, scalable and easy to integrate into a modern CX architecture. That means taking CCM to the cloud.

More and more companies are looking at SaaS and cloud solutions, and they want to be ready to go to the cloud when the time is right. Some already have parts of their DX delivery platform in the cloud, with other pieces – often including customer communications management – still operating on-premise and behind the firewall. This may be due to [security](#) concerns or IT [infrastructure](#) readiness or any number of reasons. But for many organizations, the move to the cloud is inevitable and near, and CCM is no exception.

Perhaps you're considering [taking your CCM to the cloud](#) because you're frustrated at the pace and expense of dealing with your IT organization when it comes to getting new templates built or getting simple changes made. Or you want to be more responsive to the marketplace, able to make product changes and adapt to regulatory shifts. Or maybe you have budget and you're simply ready to move on from an old-school legacy CCM solution that you've come to realize will never help you accomplish your digital transformation objectives.

Do a self-examination about [why you want or need to move your CCM to the cloud](#). There are right and wrong reasons to do it. For example, getting around IT is not a good reason by itself. However, if you're doing it because you want more business agility, that's a better reason because it has broader strategic value.

Integration of your DX technologies and smooth sharing of digital assets is important to your customers so that their experiences at every touchpoint feel consistent.

By choosing a CCM solution that's developed in the cloud, for the cloud — one built using microservices and containerization for maximum deployment flexibility and upgradeability — you can help make your DX architecture as strategically future-ready as it can be while reducing overall costs dramatically.

Empower Line-of-Business Users

Integration of your DX technologies and smooth sharing of digital assets is important to your customers so that their experiences at every touchpoint feel consistent. But also keep in mind that CX needs to feel easy and consistent to your [employees](#) as well. The challenges for digital experience architects are to integrate multiple DX solutions in such a way that line-of-business users can (1) use the tools easily and effectively, without assistance from technologists, and (2) enjoy a unified user interface that minimizes the need to learn multiple tools or switch back and forth excessively to accomplish tasks.

To that end, look for CCM software that reduces business users' reliance on IT for template and layout changes and that can [share data and content](#) with other DX tools. And choose a CCM solution that offers a [business-user-friendly design environment](#).

In what Forrester dubs the "Age of the Customer," more employees are going to be exposed to all components of the DX platform. More employees in more departments are going to be creating content and needing to deliver that over multiple touchpoints. So look for ways to move all or part of your CX management to the cloud to help reduce costs and make content development look and feel the same across the organization.

What the Analysts Have To Say

We've seen our research findings validated and further explored by leading industry analysts in multiple studies and reports.

In [The Forrester Wave™: Digital Experience Platforms, Q4 2015](#) authors Mark Grannan, Ted Schadler and Stephen Powers evaluated ten top contenders in the digital experience (DX) platform market. They found that most DX platforms do one part of digital experience delivery really well yet fall short in one or more other areas. For example, the authors clearly state that top-ranked Adobe's integrated platform "leads the market

but mostly supports marketing,” yet lacks the same degree of support for e-commerce and customer service functions.

In early 2016, Celent released its [Customer Communications Management in the Cloud: Perspectives in Financial Services](#) report, showing that many of the trend lines we noted a year earlier had continued, and some other areas of concern had begun to emerge as enterprise technology continues to march forward. Celent’s research showed more companies have been thinking about (or had already begun) moving [CCM to the cloud](#), consolidating applications and attempting to integrate their CX architecture and data across business silos — including with CCM software — for a more consistent customer experience.

And in an August 2016 report entitled [Three Steps to Enrich the Customer Experience with Contextualized Communications](#), Gartner analysts Karen M. Shegda, Mick MacComascaigh and Pete Basiliere make the case for deploying customer communications management (CCM) and web content management (WCM) solutions synergistically to deepen customers’ engagement and loyalty. They recommend, as we do, three primary steps to improve CX through CCM:

- › Shifting customer communications from a tactical, “push” perspective to a more [strategic focus](#) on the customer’s perspective inward
- › Moving from single-channel to multi-channel to [omni-channel communications](#)
- › [Integrating best-of-breed DX delivery components](#) instead of looking for a single, monolithic end-to-end solution

Why So Few Companies Are Getting It Right

So with all this research and reporting showing us the way, why are so few companies successfully integrating CCM with their overall CX management efforts and goals? For one thing, many enterprise IT departments are managing expensive, outdated, poorly integrated on-premise CCM solutions. Line-of-business users typically have to request new document templates or changes to existing templates from IT staff or other technologists, and they no longer want to wait on (or pay for) IT services for CCM in a cloud-based, on-demand world. Line-of-business users need to be able to manage CCM themselves, without ongoing involvement from technologists.

Other companies are still using Microsoft Word® documents as their CCM solution, or lightweight Salesforce.com (SFDC) add-ons. While you may be able to get a fair number and variety of customer communications flowing with such solutions, they’re simply not scalable, full-featured nor cost effective in the long run. Customer communications remain inconsistent and disconnected from the rest of CX. Today’s customer expectations and competitive marketplace demand a future-proofed, easy-to-use, full-featured and affordable SaaS CCM solution.

So in response to the analyst research and our own predictions for the future of CX and CCM, we designed INTOUCH to connect communications sent during the customer service and loyalty/retention stages of the customer lifecycle to those that were sent by systems focused on customer acquisition and onboarding. This creates a more consistent, personalized and positive customer experience across the customer lifecycle.

Getting It Right: The Rise of Digital-First CCM

A major factor in bringing CCM into companies’ DX architectures is switching how we think about customer communications. Traditionally, CCM has revolved around printing large batches of communications — letters, notifications, bills, forms, and so on — and then mailing them to customers. But now customer communications, just like every other point of contact with customers in an omni-channel world, need to be created for digital channels first (while remaining [print friendly](#)).

Digital-first CCM is about delivering [easy and effective](#) customer experiences at every stage of the customer journey, and it’s pretty much non-negotiable if you want to stay competitive with consumers who continue to expect more, faster and better access to you through digital channels. As [McKinsey & Company](#) recently asserted, “[D]igital isn’t about just working to deliver a one-off customer journey. It’s about implementing a cyclical dynamic where processes and capabilities are constantly evolving based on inputs from the customer, fostering ongoing product or service loyalty.”

If you’re not already in a digital-first mindset with your customer communications management, it’s time to start moving in that direction.



Prioritize Features That Benefit Both Employees and Customers

There's a full spectrum of CCM approaches out there, ranging from simply creating customer communications in Microsoft Word to adopting complex, still-evolving enterprise CCM solutions. To decide what features you really do need in your CCM solution, consider Gartner's recommendations in the latest [Magic Quadrant for Customer Communications Management Software](#) report. Analysts Karen Shegda and Pete Basiliere list the four core elements of CCM, which should be a given in any viable solution: a design tool, a composition engine, a workflow or rule engine, and multichannel output management.

However, they also list some emerging new technologies and innovations that set some CCM tools apart from others, including:

- › Customer engagement features (social and mobility)
- › Personalization and contextualization capabilities
- › Dynamic design and document composition using contextual data
- › Integration with other digital experience technologies

Add in [interactive communications](#) functionality — dynamically created, highly personalized customer correspondence tools for employees, partners and customers — and robust tracking and recordkeeping capabilities for a truly full-featured, best-of-breed CCM solution.

CCM of the Future Should Be More Affordable Than Ever

The best news is that cloud-based CCM should not only be full-featured and easy for line-of-business employees to use, it should also be more affordable than CCM has ever been. That's because cloud-based CCM is designed to be streamlined, agile and light on you and your infrastructure. With a CCM SaaS solution, you don't need to pay for servers, staff or managed services. With the right CCM solution, you'll only pay for the features you use. And, ideally, your pricing would be based on the number of software users and the volume of communications you send.

For more information on CCM and Digital Experience and INTOUCH, check out the following resources:

- › Visit our [Resources Page](#) to see white papers and other materials related to INTOUCH.
- › Read the [Topdown Blog](#) for articles related to INTOUCH.
- › Go to topdownsystems.com/INTOUCH to learn about the high-level benefits.



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