



Connecting Customers to a Deeper Conversation

Communicate through Multiple Channels for Greater Engagement and Retention

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How to Use This eBook

A Path to Better Customer Engagement Using CCM

In our digital age there has been a lot of talk about the importance of engaging with your customers on their preferred communication channel. But there has also been limited clarity on how to proceed in a way that both simplifies your efforts and best leverages your dynamic content to optimize each delivery channel.

The purpose of this eBook is to provide that clarity. It introduces the concepts of passive and active multi-channel communication and demonstrates how they are important features of your successful customer communications management (CCM) implementation. Adopting a CCM solution with passive and active multi-channel communication empowers your business to engage with your customers across multiple delivery channels and with minimal effort.

Please give a copy of this eBook to your line of business managers and marketing management teams so they can familiarize themselves with key terms like “passive and active multichannel communication” and better understand how your company can delight customers with meaningful communications delivered on the customer channel of choice.



Customer Interaction Transformed

The Multi-Channel Opportunity

According to the Internet Trends 2015ⁱ report, global adoption of Internet usage has grown from 35 million users in 1995 to 2.8 billion in 2014, equivalent to 39% population penetration. And mobile phone adoption has skyrocketed from 80 million users in 1995 (1% of the global population) to 5.2 billion in 2014 (73% of the global population).

Clearly customer communications has experienced an unprecedented transformation over the last two decades. Consumers engage with vendors through more communication channels than ever before - including wide adoption of chat, email, text, online communities and support forums in addition to traditional print, fax and phone communication channels.

This communication shift presents a unique opportunity for your organization to gain a competitive edge and increase customer adoption rates by delighting your customers with meaningful communications delivered on the customer channel of choice.

39% of the global population is online

Source: Internet Trends 2015



Customer Communications Management

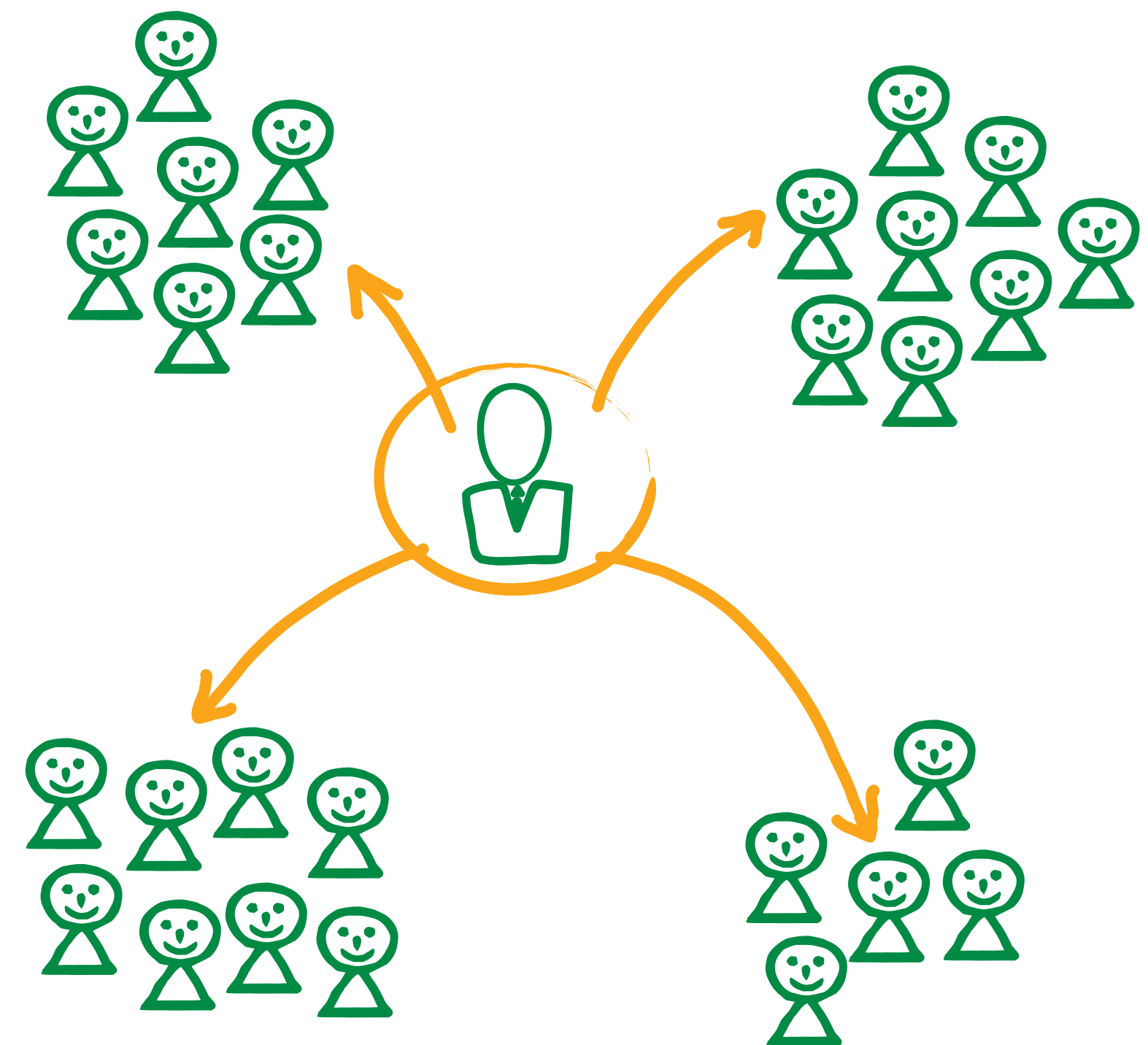
On Demand, In Context, End-to-End

To help simplify efforts and streamline the process in meeting customers' communication channel preferences, organizations are moving to adopt CCM technology. In fact, Gartner Research estimates 70% of customer communications will be digital, contextualized and consumed on-demand via multiple channels, including the Web, mobile devices and social media by 2017.ⁱⁱ

Gartner Research reiterates the value of multi-channel communication, stating, "moving beyond the basic personalization that was a staple of document composition tools, enterprises have also recognized the power of CCM solutions for handling on-demand and interactive scenarios. Today's CCM software must also support the revenue opportunities arising from instantaneous context-aware interactions with users who express their product and service needs via mobile devices and a variety of social media channels."ⁱⁱⁱ



CCM solutions help you improve your end-to-end customer experience and are an ideal approach for organizations looking to streamline and integrate their customer communications. A successful CCM implementation empowers your business to engage and manage communications with your customers across multiple delivery channels and with minimal effort.



To learn more about the seven core requirements in selecting a CCM solution, download a copy of the [Customer Communications Management Buyer's Guide](#).

Passive & Active Multi-Channeling

Targeted Communications for Every Customer Need



A CCM solution supports content types such as letterhead, disclaimers, standardized corporate signatures, invoices and statements, general correspondence and marketing communications. Your customers' communication preference should determine the format and channel through which they receive their documents. By dividing document output needs into passive and active multi-channel processes, you can get a better understanding of their diverse application needs:

Passive Multi-Channeling

Passive multi-channeling allows business managers and users to repurpose a document for different delivery channels without causing any variations in the output. For example, you can convert a document or message that was generated for one channel into a message that can be used in another channel, such as converting a document for print output into a PDF document that can be used for email delivery.

Active Multi-Channeling

Active multi-channeling generates alternative content and formats tailored to fully take advantage of the different delivery channels. For example, active multi-channeling allows you to send an email that includes the customer's personalized link to their online portal account. For the print version of that same communication, you can tailor the content accordingly to make the customer aware of the online portal and the opportunity to receive the personalized link via email.

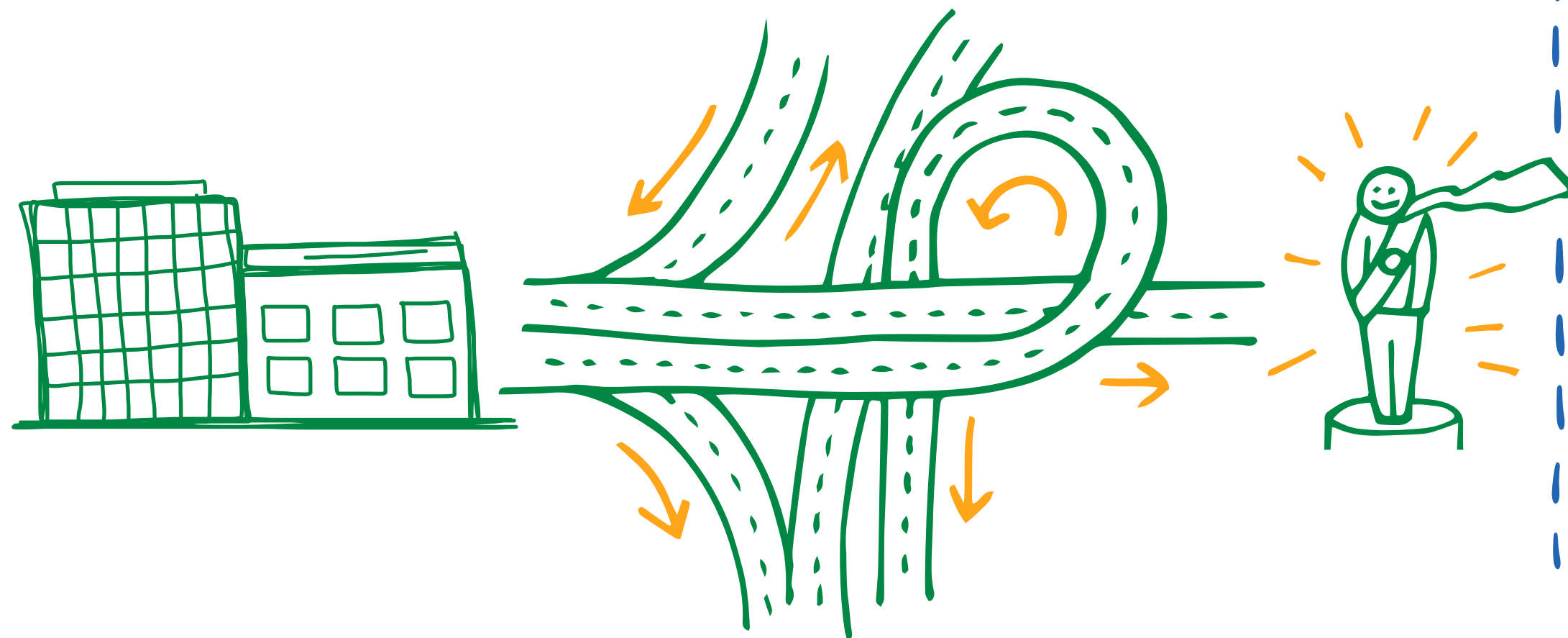
Top 3 Benefits of Passive and Active Multi-Channeling

Dual Approaches Enhance Customer Convenience

Organizations will have their unique processes and communication requirements where both approaches are needed and provide a benefit. To optimize your customer experience, a strong CCM solution should provide your organization with support for both passive and active multi-channeling.

Passive multi-channeling (e.g., moving communications from print to email) provides considerable benefits:

- ➡ Provides operational cost savings with reduced expenditures on paper, print and postage.
- ➡ Alleviates the cost of redeveloping and redesigning communications for different channels.
- ➡ Supports digital communications that reach your customer faster.



Active multi-channeling supports dynamic communication with extensive benefits:

- ➡ Enables your communications to be adjusted to a specific target group. Customers who prefer to receive an email are probably different than those who prefer a printed version. Applying active multi-channeling allows you to adjust your communication content based on the target recipient group.
- ➡ Empowers you to fully leverage and optimize the possibilities of every delivery channel. For example, communications sent via email let you easily include links to new product promotions, purchase and renewal transactions, shopping carts, etc. With active multi-channeling, you can include these links directly in the digital communication and adjust the communication for printed delivery to refer to a vanity URL for more information.
- ➡ Equips your organization to adjust the layout and format of the communication for every single channel, including optimization for different presentation types and screen sizes.

Passive Multi-Channeling in Action

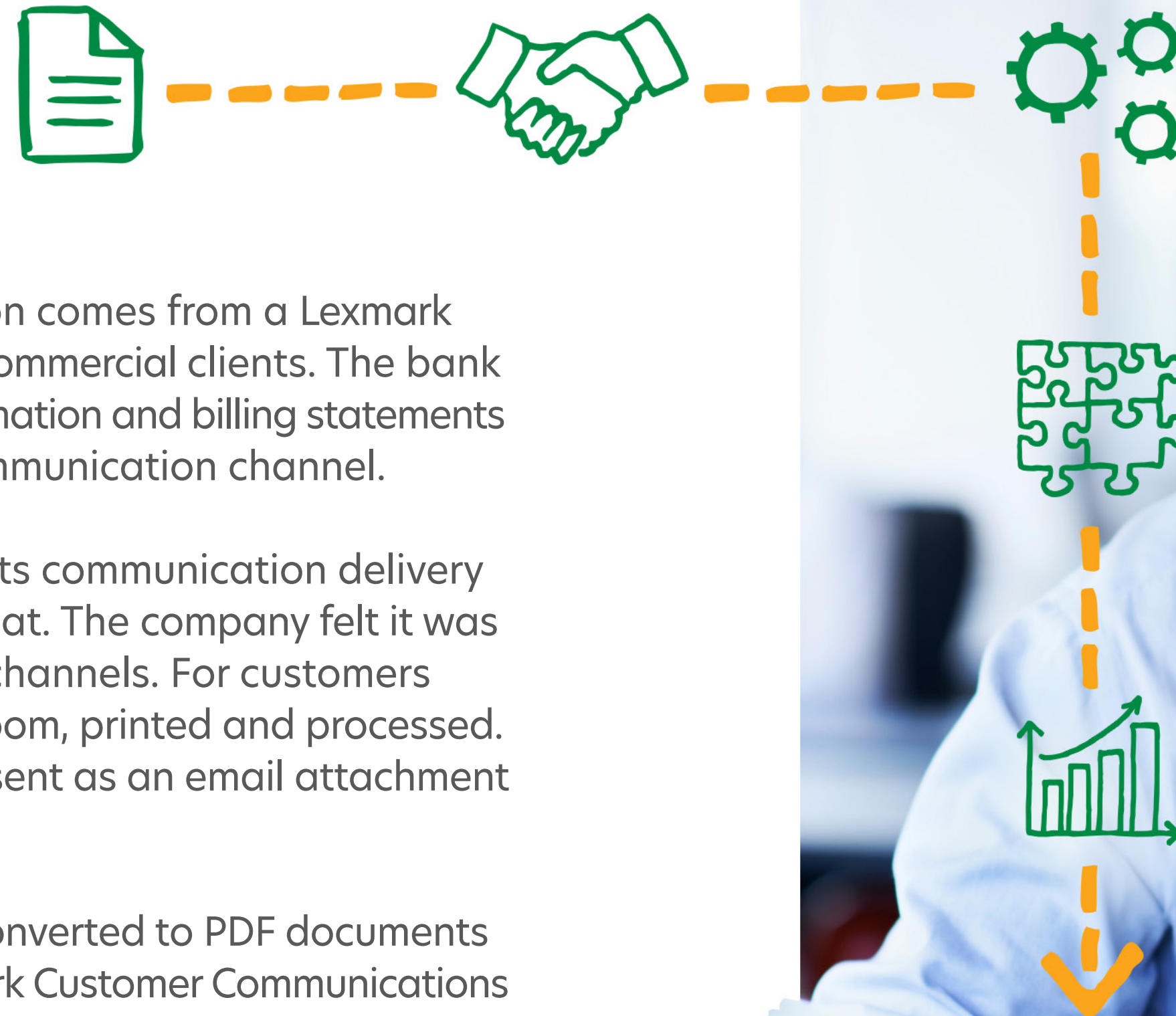
National Bank Meets Single-Format Communications Goal



A good example of passive multi-channeling in action comes from a Lexmark customer: a national bank serving retail, private and commercial clients. The bank places importance on ensuring customer account information and billing statements are always accurate and consistent across every communication channel.

When using Lexmark Customer Communications Manager™ to define its communication delivery rules, the bank deployed a passive multi-channel communication format. The company felt it was important to produce all documents in PDF format - across all delivery channels. For customers who want print delivery of a message, the PDF file is sent to the mailroom, printed and processed. If the customer prefers to receive email communications, the PDF file is sent as an email attachment (with a standard email text).

In this way, communications from other sources can be imported and converted to PDF documents and then integrated into the communications stream created with Lexmark Customer Communications Manager. Whether such a document is mailed out, stand-alone or as an attachment to an email, all the communication rules defined in the platform can be applied to it.



Active Multi-Channeling in Action

Personalized Content Optimizes Communication



Looking at another Lexmark customer provides a great example of how your organization can benefit from adopting active multi-channel communications. The company provides health, life, liability and other insurance services predominantly to SME entrepreneurs. With its vast range of offerings and client base, the company felt it was important to tailor its communications with different messages for different channels.

Using the active multi-channeling features in Lexmark Customer Communications Manager, the company sends messages by print, portal and email. If a message is delivered via email, for example, it includes specific mail bodies that are adjusted to the email delivery channel.

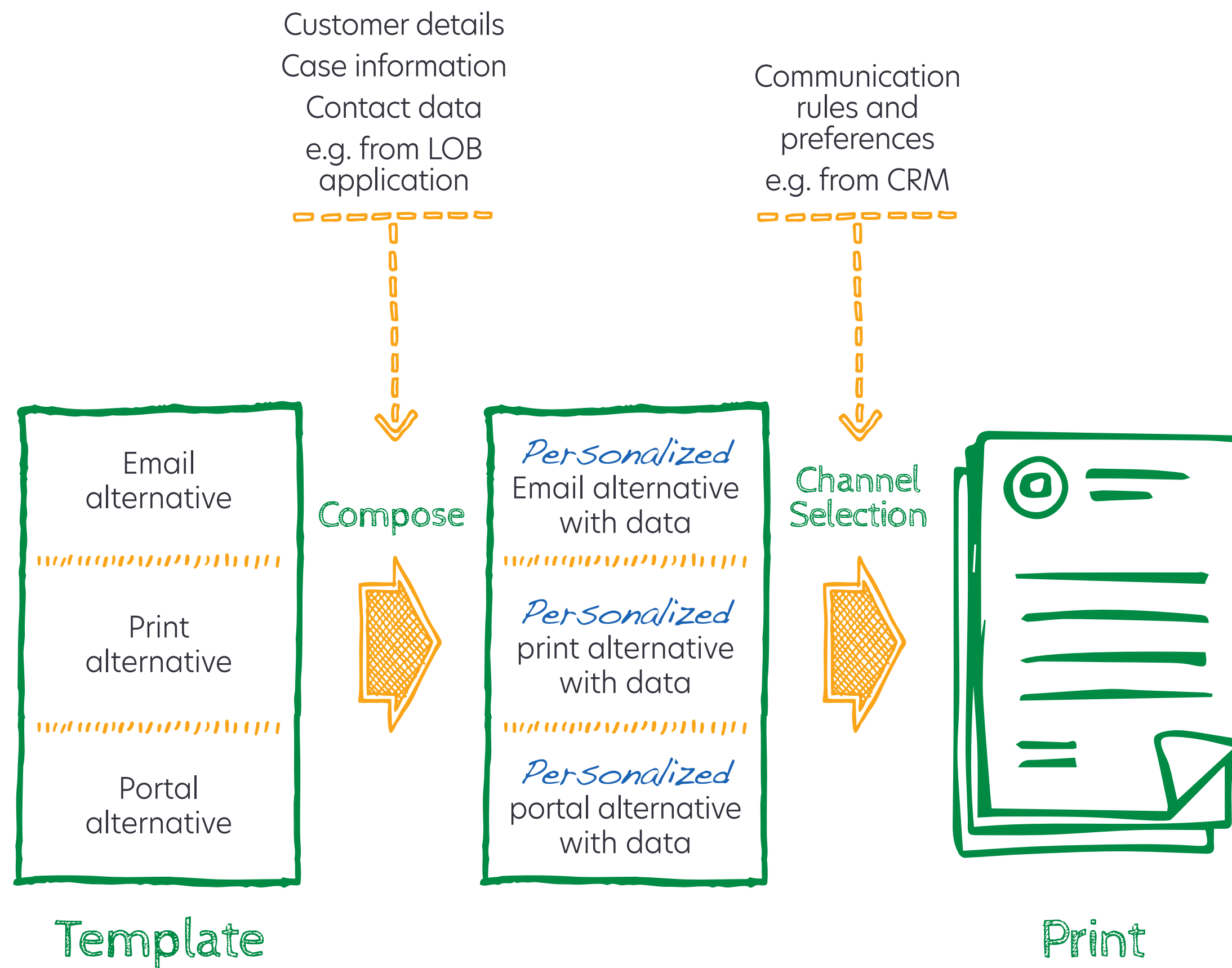
With active multi-channeling, the organization designs its messages - both the content and the look and feel - specifically for each channel. This means that organizations can use the benefits and capabilities of each channel to optimize the communication and also change the tone and/ or length of the message to match the channel.

Typical examples include:

- 1 Print communications that let your customers know they can register online to receive communications, such as monthly statements, via email.
- 2 Varied tone and length based on delivery format, such as emails with personable tone and more detailed content and print communication with more formal tone and concise content.
- 3 Email communications that contain links to a personal pointer page.

How Customer Communications Management Works

Templates Boost Efficiency, Reduce Complexity



Active multi-channeling provides powerful capabilities to better engage customers with meaningful communications tailored to take full advantage of each delivery channel. Implementing the right CCM approach shouldn't introduce additional complexity, and Lexmark Customer Communications Manager makes active multi-channeling a simple process.

With Lexmark,
you can design templates from reusable building blocks.

First, you set up the styling for your brand and create reusable text blocks and standard paragraphs. When a template is created, you can set up multiple alternatives for different channels. For each alternative, you can choose from the existing styles and text blocks to avoid duplication of work. This lets you quickly and efficiently create templates leveraging the platform's active multi-channeling capabilities. When one of the text blocks or styles changes, it is automatically picked up by the relevant alternatives in every template. There is no need to manually update each and every template for a font change, a new phone number or the name of a manager.

Make Sure Your CCM Is Multi-Channel

Use the checklist below to guide your evaluation

A strong CCM solution should support a rich variety of output possibilities to ensure content can be sent the way customers want to receive it. It should support both passive and active multi-channel capabilities. The desired goal is to delight your customers and to improve your customer acquisition and retention levels.

Keeping those objectives in mind, a CCM solution's channel output capabilities should:

- Compose personalized and relevant communications.
- Support delivery of communications via electronic channels such as email, SMS, portal publication, EDI infrastructures and others.
- Support traditional delivery channels, such as print and fax.
- Support passive multi-channel capabilities through import and conversion options.
- Support active multi-channel capabilities by providing channel-specific styling options and channel-specific content alternatives.
- Allow reuse of content and styling in different templates and for different channels.
- Integrate with e-signature solutions to support end-to-end digital transactions across all channels.
- Support real-time, on-demand composition and delivery for agile and efficient communication.
- Support batch composition and delivery for delivery planning and capacity management.



Lexmark Communications Manager

Personalized Content, Powerful Context

Lexmark Customer Communications Manager™ empowers organizations to engage and communicate with their customers across different channels, with minimal IT effort. It does this by generating relevant and personal communication and delivers it through email, print, portal and other channels. Documents can be generated fully automated or through an interactive process.

Lexmark Customer Communications Manager is used in more than 30 countries and by more than 250,000 users. Documents can be used and maintained by business managers, alleviating resource demands on IT. The flexible, reliable software creates your documents, is easy to use and integrate and empowers your people to communicate.

To learn more about Lexmark Customer Communications Manager, visit:

www.kofax.com/ccm

