How many people does it take to get your communications to your customer?

Communicating with your customers on a regular basis is critical to your company's success. So, it is no wonder so many people in your organization are involved. How many people you ask? Of course, it depends on the size of your firm and the significance of the communication. It also is dependent on the channels you will use, the data source populating the communication, the frequency of it and many other factors.

The Stakeholders

One thing we can definitively say is that there will be multiple stakeholders involved. These stakeholders can be managed in many ways to ensure that getting these communications out the door is not a monumental act of congress each time and the customer experience is great.

Let's talk about the stakeholders first. The purpose of the document or communication will determine the first key stakeholder. For example, if it is an invoice, Finance may be the catalyst. If it is an insurance document, the line of business that is involved with that particular product (i.e. – car insurance policy) may be very involved. The two examples above may know their departments and the business well, but they may not know the first thing about customer communications. They know what they want to accomplish but they need help from a solid supporting cast of stakeholders.

There are a few forks in the communication road that determine the stakeholders.

Fork #1 – In-house or outsourced

I'm going to start from the position that the company is doing everything in-house. From design to output.

Since you are doing everything in-house, you will have more stakeholders involved and a subject matter expert (SME) in customer communications will evolve. The usual suspects that will participate in a customer communication will be as follows:

- **Information Technology (IT)**
  - They will be involved at the intersection of data received, communication design and output via multiple channels. There will be team members that specialize in the logistics of routing data to the source that needs it, and others that will ensure that when it is consumed by a customer that the information can be easily received and digested in the channel of their choosing. See *"How to Make Customer Communications Management Work For You (And Them!)"* for more information on design and channels.
  - In-house IT departments will ensure that they have the right tools in place to create and route communications. Tools such as servers or cloud infrastructure, composition software from organizations like OpenText, Smart Communications, PlanetPress, or Quadient and other tools that might help them with compliance language accuracy, operational efficiencies or just knowing where your customer lives. Yes, customers move and change how they want to ingest your communications. Therefore, it is critical that you know which channel they want to engage in, so you can provide it.
- **Dev Ops**

- o A close cousin of IT is Dev Ops. According to D.J. Mala & Mike Loukides, DevOps is a set of practices that combines software development (Dev) and IT operations (Ops). It aims to shorten the systems development life cycle and provide continuous delivery with high software quality.
- o Simply put, these folks make sure that the systems are in operation, maintained, connected, and protected. When it comes to customer communications in today's world of instant gratification and always on mentality, there is no time for downtime. This team is on call 24 hours a day to make sure when you want your information it is available at your fingertips.

- **Purchasing / Sourcing**
  - o Without someone managing all the software, hardware, maintenance, and other contracts & agreements, none of the tools required to keep things running could happen or keep happening. They also make sure it all makes financial sense and that it aligns with the overall company strategy.

- **Legal**
  - o Legal may review and approve some of the contracts associated with the stuff that Purchasing acquired on your behalf but more importantly they make sure that you aren't saying anything to your customers that you shouldn't. They also tell you what you "must" disclose or share with your customers. Everything from Regulatory Language to compliance items such as informing customers of an automatic renewal or a price increase.
  - o Yes, there are even rules around how big you have to show a message in your communications, how you calculated the fees or interest (sounds like math class when your teacher said, "please show how you got to the answer") or even how you have to treat people who have physical challenges like degrading eyesight.

- **Line of business (LOB) team**
  - o The folks that are in the day to day customer trenches, either interacting with customers, or trying to figure out what products or services your customers want next are critical to creating the communications. They are usually the closest to customers and they can express the voice of the customer.
  - o Subsets of this group can be Product, Customer Success or Customer Service and they can provide much needed input to ensure that your message is congruent with the receivers of the information

- **Marketing**
  - o Customer communications not only tell people what they must hear or what regulators tell you to say, they also inform customers about things that they may want or would benefit from. Subjects like discounts or new products and innovations or simply about how they can communicate with you better.
  - o Marketing will also incorporate market data and data gathered from inbound or other sources. This data then must be programmed into automated programs for customer segmentation and omni-channel communications.

- **Operations**
  - o If you ask an Operations Manager about the things that they are asked to perform on behalf of their other team members, most will say, "why didn't you ask me if that would

work?" Operations is where the rubber hits the road, they experience the challenges of incorrect programming, crazy deadlines, legal snafus, among other items that they just fix… all in a day's work.

- Operations should be a key part of any communications development strategy team since they will be "catching what you are throwing at them." In many cases, they might be working while you are sleeping, so you don't want a call in the middle of the night asking you a question or you don't want to wake up to an email saying, "your communication didn't get sent out."

- **Finance**
  - All companies are in business to make money. Finance will most likely insist on a good business case to build out in-house infrastructures and may also audit what it is costing over time. They are keeping their eye on the bottom line and they want costs to be managed. They may also bring up the outsourcing option. Outsourcing of various functions or areas that can be served and maintained by other organizations that are extremely focused on those areas.

The other fork in the road – Outsourcing

More and more, organizations are focusing on their core competencies. In many cases, that includes customer communications. This often falls under the umbrellas of Customer Communication Management (CCM) or Customer Experience Management (CXM). With that being said, I am not talking about the message or your brand, although, those too can be supported with industry experts and Marketing firms, I am talking about infrastructure like cloud servers, print service bureaus and disaster recovery operations. With so many channels popping up regularly and technology changing so fast, it is challenging to be an expert in everything. This makes outsourcing a viable option especially if your business fluctuates due to seasonality or with complexity or volume. It is often a great way to scale your communications or expand into other channels.

The choice can philosophical, mathematical or it can be done for several business reasons like moving from capital expenditures (CapEx) to operational expenditures (OpEx).

Any way you look at it, the need for cross-functional collaboration is critical to making the customer experience the best it can be, and it takes a lot of people.

About the Author

Paul Abdool is the Chief Revenue Officer at WayPath. He uses his 20+ years of regulatory communications industry experience to help customers develop and optimize their customer communication strategies with process automation, workflow solutions and professional services.

If you are planning an enterprise wide Customer Communication Management (CCM), Customer Relationship Management (CRM) or Content Management System (CMS) software deployment, please contact WayPath Consulting to discuss your needs. www.waypathconsulting.com