How to Make Customer Communications Management Work For You (And Them!)

Where do I even begin?

This is a question we often hear during the initial discussions around document redesign, refresh, and conversion projects. Most of our customers jump immediately to integrations and software, but these are finite aspects of a much broader picture. While solutions for data and data transformation, software and development, and integrations must all be defined, these questions are easier to address once a plan is drawn out.

To expound, let me pose the following hypothetical: If you were setting out to build a house, where would you start? Would you grab a shovel and start digging out the foundation? How about heading into the forest to chop down a tree? Would you frame out a window, or start running plumbing or electrical?

Chances are you would start with planning, such as thinking about where you wanted the house; what materials you might use; how many floors you wanted and the floor plan for each. The list goes on, and by now you're probably thinking about a whole host of considerations that would inform and drive the construction. These decisions would ultimately become the blueprint for what is to be built.

So why would we treat customer communications any differently? What if there were a 'blueprint' for tackling the massive effort that is managing your communications, from design and brand standards, content and language, all the way to requirements and development? Well, such a plan – or an approach, rather – does exist. WayPath has been down this road many times over the last twenty years, and we've formalized a methodology that is both effective and repeatable. We've summarized some of our key learnings for your benefit below.

Clarify Your Objectives

To borrow from Stephen Covey, one of the seven habits of successful people is to begin with the end in mind. This is a critical exercise to conduct before undertaking any correspondence project, no matter how large or small. You may be wondering what this has to do with choosing a CCM software platform. Well, what are you hoping the software will do? Who will use it? (e.g., IT or the business?) What features does your organization require? How often are you willing to upgrade? Understanding your long-term goals will help with right-sizing the software platform for your organization.

Ask yourself the following questions:

Why are we doing this?

Are you changing the look and feel of the documents? What about language and content? The project driver - for example, a brand refresh vs. a system conversion - will dictate the objectives. Make sure everyone understands what you're doing and why so that you can set clear expectations up front. Understand that redesigning correspondence and content will require more time and resources, not to mention layers of approvals.

What's the scope?

This is an easy enough question to ask, albeit often trickier to answer. Do we include just Membership and Sales forms? What about Bills? What about Claims or Audit forms? What about email and web forms? Draw the lines clearly and have a plan for anything that doesn't make the cut. Keep in mind you don't have to tackle everything at once, and defining an incremental path forward is better than no plan at all.

Who are the key stakeholders?

A correspondence project will likely require coordination with more than one area. In addition to individual business areas and Product Owners, there's also IT, Security, Fulfillment, Procurement, et al. (See *"How many people does it take to get your communications to your customer?"* for more details on stakeholders). Make sure you have buy-in from all of your business partners and clarify the roles and responsibilities in your kickoff meeting. You don't want to get halfway through a project to find out nobody was working on a key task, such as submitting the plans for an architectural review, etc.

Know Your Inventory

Tackling correspondence can feel like boiling the ocean. To help ease the pain, look for ways to cut down on overhead and start building on efficiencies. We've honed our processes over the years to make this step easier.

Consider the following ideas:

Define standards

Even if you're not doing a full redesign, take the opportunity to capture your brand standards in their current state. Consider this an opportunity to enforce consistency within font family, use of font weights, logo sizes, margins, XY placement of body content, etc. Not only will this give a sense of uniformity to your documents (even without a redesign), you're also making your life easier for when you do decide to move forward with a new look and feel.

Group like documents together

Start by looking at the big picture within your inventory of documents. (Note, WayPath takes every opportunity to limit print and conserver resources, but this is one exercise that will require hard copies of documents) Print out copies of your documents and post them on a wall or lay them out on the floor. Group similar documents and affinitize the results. You can also incorporate aspects of functionality in this process, like grouping coupons together; grouping letters by layout; separating documents with large images or watermarks.

Slim down distinct templates

Following the exercise above, try to cut down on the number of templates – or distinct, generic layouts – to the minimum number possible. You don't have to go overboard in this step, per se, but rather look for ways to iron out inconsistencies as a bonus. For example, if the majority of your documents have the company logo on the left side, try to pull in the outliers for consistency. There's no need to create distinct templates for subtle differences.

Reuse content wherever possible

Whether logos, info boxes, titles, or even content – look for ways to cut down and reuse. Not only does this make the upfront effort easier, it also keeps overhead and maintenance to a minimum after the project. This is also a way to enforce design standards, which brings us to…

Select the Right Tools for the Job

Knowing the way and walking the path can be two different experiences. Once you have your plan of attack, have a means to keep everything and everyone organized when you get started. This will not only make your life easier during the project, it will also lower the cost of maintenance and simplify any future undertakings. Here are a few things we've learned along the way.

Keep requirements simple

We use mockups and DLRs – that's just a fancy acronym for document layout requirements – to capture low-level requirements for our clients and development teams. In our house analogy, these are the blueprints. We keep the DLRs simple and clear enough that virtually anyone could read and understand them without any prior context, thus enabling clear and effective communication from concept to actual output.

Codify content layouts

Following our house example, think of this as defining floors and floor plans. Once you know how many floors your house will have, you can start detailing where the rooms will go. Similarly, with correspondence, once you have gathered the requirements and identified the core templates, you can start breaking them down into a handful of content locations. For example, your documents may have a title and logo in the header, which could become locations one and two. Try to work in big chunks and limit yourself to five to ten locations per page.

Define the workflow

This may seem like a no-brainer, but therein lies the rub. Talk with the teams involved to clearly discuss the workflow in its entirety, starting with inventory and going through design, content, requirements, data, development, and testing. Don't forget key topics such as approvals, Legal / Marketing, change requests, regression testing, etc. Remember that you can sink a ship with one direct hit, or lots of smaller – but harmful – hits.

Manage your content

Building on the guidance above regarding reusability, you must have an effective means to intake, identify, categorize, and maintain all of your content. We have developed a custom database to do just this, which allows us to search for content, logos, key words, etc. prior to adding another needle to the proverbial haystack. Whether you use Excel, Access, or even just pencil and paper, think about what you'll need your database to do and ensure that the solution is up to the challenge.

Where do we go from here?

Going back to our original question, we hope this demystifies several aspects of getting started in the correspondence management process. Clarifying your goals up front, getting a solid grasp of your inventory, and having a means to codify your requirements will provide a solid foundation upon which you can build a robust correspondence managements system. At this stage, you'll be ready to talk about the tools and technologies available to help realize these goals. Although the challenge may seem daunting, managing your customer communications can be reined in with the right approach, tools, and experience. WayPath has been involved in the CCM and CXM space for over 20 years, and we've helped dozens of clients navigate the uneasy waters of correspondence management. As our motto states, "we help show you the Way when the Path is unclear." We'd love to hear how we can help you and your organization meet your goals for the future.

About the Author

Marc Speed is a Managing Consultant within the Customer Communications Management (CCM) practice at WayPath. Mr. Speed started his career in the insurance industry as a business analyst and project manager, from which he has amassed over 15 years of experience in analysis, project management and delivery, process improvement, and Scrum. Marc has worked with numerous clients in a wide range of industries, including financial services, health care, and consumer packaged goods. Marc is a certified Scrum Master (CSM), Product Owner (CSPO), and business analysis professional (CBAP).

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