

# Transform Your Customer Communications

An innovative, effective approach to managing your communications for a more successful customer experience.

**xerox**<sup>™</sup>



# Your business begins and ends with your customers.

Customer experience is one of the hottest topics in marketing today. And rightly so: for most businesses, it's the key to differentiation — and loyalty.

The thing is, too few companies are serious about solving the dozens of customer communications issues that add up to a bad customer experience.

After all, what is customer experience if not the sum of every single communication a customer has with your business?

## **PRACTICAL ADVICE AHEAD**

Because “customer communications” is such an unwieldy topic, the thought of “getting it right” can be daunting. How do you even start?

That's what this ebook is about.

We're not claiming we've unlocked a silver-bullet solution that will transform your communications overnight.

This is a hard problem that touches a number of different areas — but solving it means establishing a leaner operation and a reputation for great customer experience.

We aren't going to tell you how important personalization is or why you need an omnichannel strategy — these are things you know. Instead, we're going to focus on a new way to think about customer communications — and the practical steps required to implement innovative thinking.

Let's dive in.

# A new way of thinking.



Doing customer engagement well — and getting the benefits of improved customer experience — is about thinking both big and small. Really small. Tiny details.

It's about getting down in the weeds to look at every single one of your customer touchpoints and asking:

- Will this help drive loyalty?
- Could we be giving our customers something they'll value more?
- Can we deliver this message more efficiently?
- Should we use a different channel to be more effective?
- Can we connect with customers wherever and whenever they want?

In short, could every single one of our touchpoints be better?

A lot of the time, the answer to the last question will be “yes”. And a lot of the time, it will be down to individual, simple fixes – things so obvious you’ll be amazed you never noticed.

The challenge is seeing all of the ways you could communicate better across your whole organization — and putting the structures in place, so your touchpoints can be viewed and managed as a single entity.

# A new way of thinking.

When you attain this holistic view of an individual customer, you can immediately start adding value by integrating every touchpoint with the other communications that are part of the ongoing customer relationship. So, let's say you're a publisher and you know many customers spend most of their time browsing your travel section. When the time comes for them to renew their subscription, you can sweeten the deal with offers for great travel deals that come with the subscription.

With the right structure in place, you can get the details like this right every time — and start getting the increased customer satisfaction that such a great experience brings.



# The problem with customer communications now.

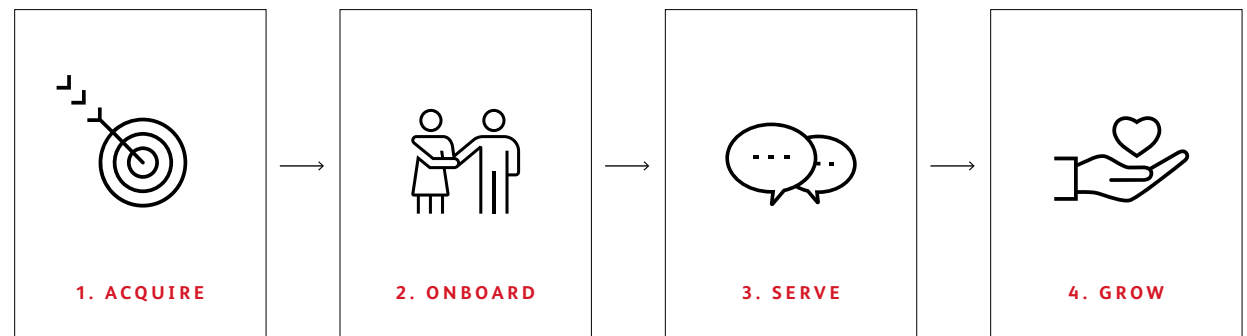
To get where you need to go, you have to understand where you are.

Here's the way customer communications happens at most enterprises.

Each of these stages involves customer touchpoints. But many businesses put most of their efforts (and budget) into the first stage — “acquire” — and the last stage — “grow”.

That's understandable: winning customers, and then getting them to buy more through cross-selling and up-selling is the exciting part of engagement. It's where customer communication most obviously relates to revenue.

But, to deliver a great customer experience, you have to deliver amazing, valuable, and consistent messages throughout the whole customer journey.



# The problem with customer communications now.

## WHY EVERY STAGE MATTERS

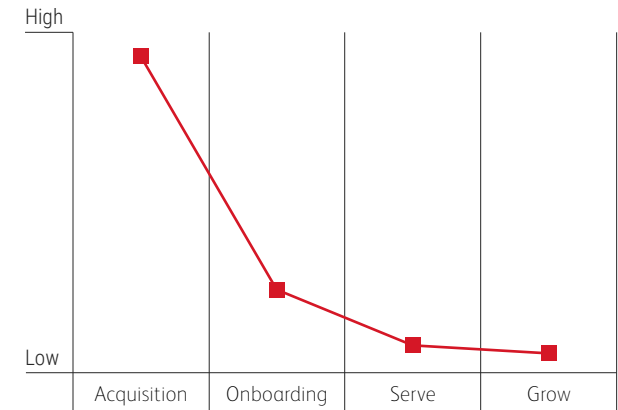
Let's say a customer is shopping around for a new credit card. She's been impressed by your bank's marketing materials. She's been convinced and reassured by your salespeople. She's signed up. Result!

But then the good times are over: the first thing she faces is a long onboarding process that involves filling in lots of different paper forms, sending them by mail, and waiting around. No one mentioned this was coming. Immediately, her customer experience starts going downhill.

Your marketing did its job — but now she's receiving communications from a back-office function that relies on slow, paper-based processes, created and distributed using legacy platforms.

In other words, the experience of actually being your customer isn't living up to the promise of your marketing. And that's a total loyalty killer.

## Customer experience at each stage of the customer communication journey



# A holistic approach to customer communications.

Fragmented communications lead to disjointed experiences that lead to unhappy customers. That's why, using the new approach, you view customer touchpoints in a holistic environment — and then manage them accordingly.

Lots of departments have skin in this game: marketing, operations, billing and finance, sales, IT, legal, customer services, and others. So, it's never the responsibility of a single department to unify customer engagements. Every department has to look at their communications through the same customer experience lens and identify where they need to be joined up.

## WHAT THE NEW APPROACH LOOKS LIKE

Customer communication is a single business-wide responsibility. To turn this holistic approach into a real process, you start with five steps.

# 1. Join up marketing and operations.



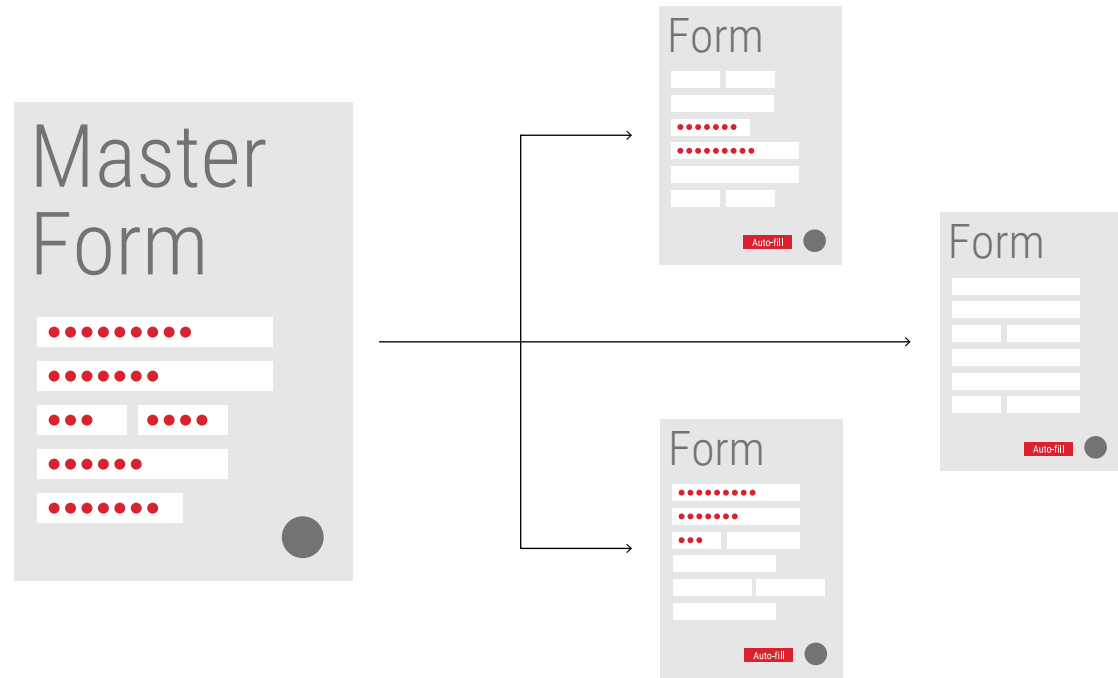
When a prospect becomes a customer, they're handed over from marketing to operations. But just because it's a different part of the business communicating with the customer doesn't mean the engagements should be any different. The customer shouldn't notice the difference: for them, it's still the same brand.

Things like onboarding documents and monthly bills should have the same design, brand messaging, and level of personalization as marketing materials. In fact, they should be marketing materials: if an invoice is the only time you interact with your customer, that's an incredible, regular, approved opportunity to stay in touch, check that they're happy, build loyalty, and offer other products or services.

This isn't just about marketing and operations: it's about marketing and any department that deals with customers. Every touchpoint represents an opportunity to build loyalty.



## 2. Rationalize documents.

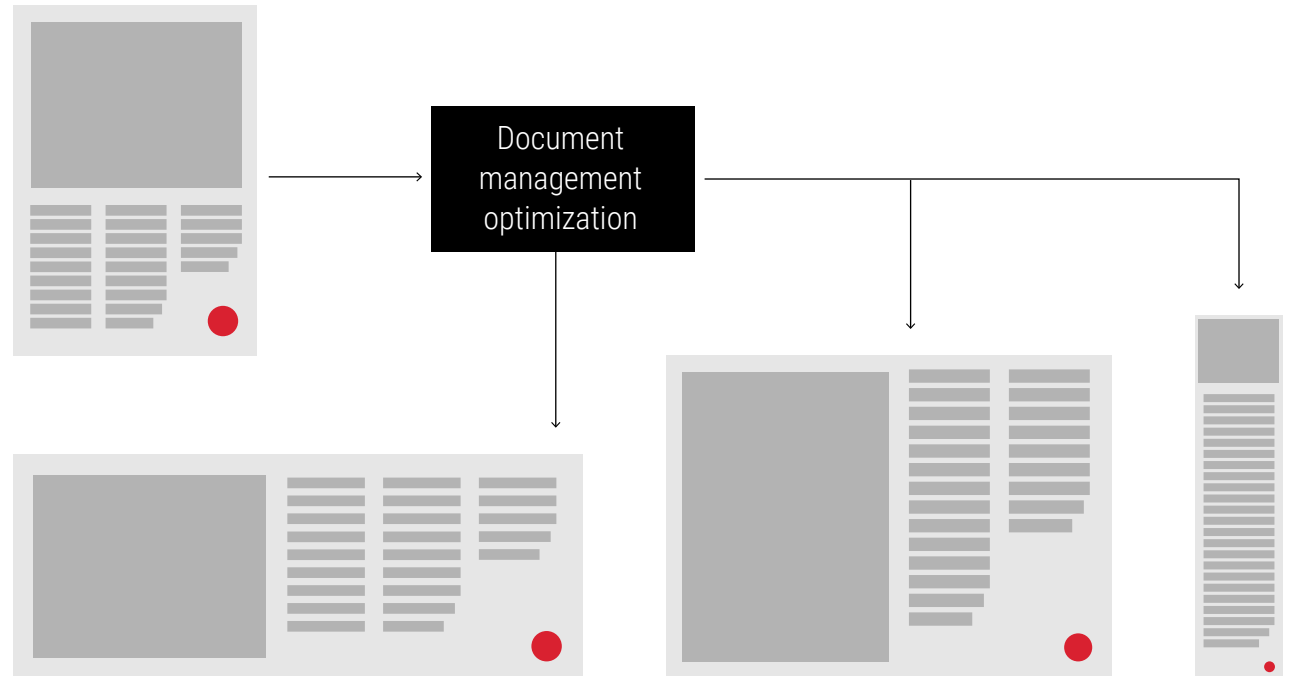


It's only when you can see all the communications you're sending that you realize how many steps might be unnecessary. This is particularly evident in seemingly mundane areas like billing.

Take invoices: a large enterprise might send hundreds of thousands (if not millions) of printed invoices a month. This represents an enormous cost in both print and postage.

But, by rationalizing the management of customer invoicing, you get loads of benefits. Not only can you start taking advantage of paperless billing by moving some of the invoicing to digital, you can also do things like redesigning invoices to add tailored messaging and make them brand-consistent. So your customer gets a smarter, more personal end product — and your business minimizes costs while creating more cross-selling and up-selling opportunities.

### 3. Seek out process inefficiencies.



Companies don't create bad customer experiences because they want to. The problem is that the processes needed to deliver communications are so rarely analyzed as part of a bigger picture. As a result, most businesses have waste and inefficiencies buried in these processes. So not only does the experience suffer — it probably costs you more to even deliver it.

For instance, the collateral you produce needs to be sent out across multiple channels, both digital and print. Often the result is collateral that has been tweaked and redesigned in isolation to meet the needs of every channel. Not only is that a waste of time and resources, it's also where duplication errors can creep in (which means you need further resources for checking collateral).

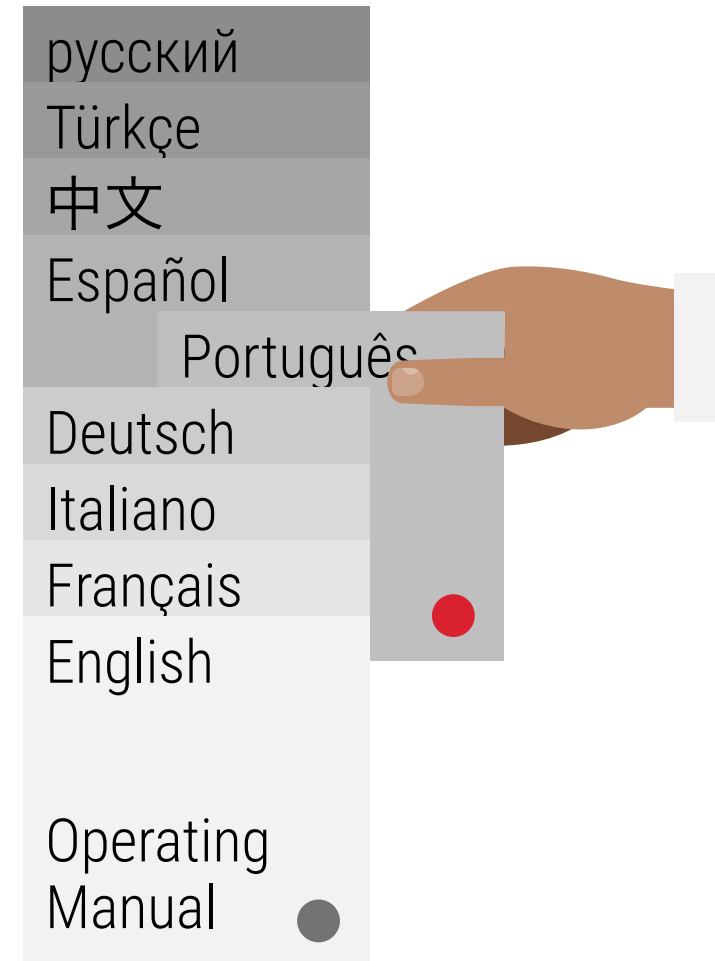
With a centralized system for document management, you design each piece of collateral once, and it's then automatically optimized for each distribution channel, saving you resources and cutting out costly mistakes.

## 4. Leverage every opportunity to localize.

You know where a customer lives and what language they speak. Why send them a technical manual that's 200 pages long, because it has to include 10 other languages your customer doesn't speak? By separating content from layout and design, you can update a document with discrete information that meets the needs of a local user rather than every user on the planet.

Even if you're a global business, all your content needs to be delivered locally. And the digital world of 24/7 mobility means your customers want to access these personalized communications anywhere, anytime.

Only by streamlining your engagement processes can you deliver this always-on personal experience for your customer — while also making savings for your business.



## 5. Focus on both print and digital.



The idea that customer communications is all about “going digital” is misguided. The hybrid environment of paper and digital is our reality — the point is to get the best out of both.

In some instances, moving paper-based processes to digital is the right idea. Making statements, bills, or even technical documents digital improves the customer experience (by making them easier to manage and respond to) and cuts down on costs. Far too many businesses use paper-based forms to do what’s a lot easier done digitally, like sending surveys and loyalty sign-ups.

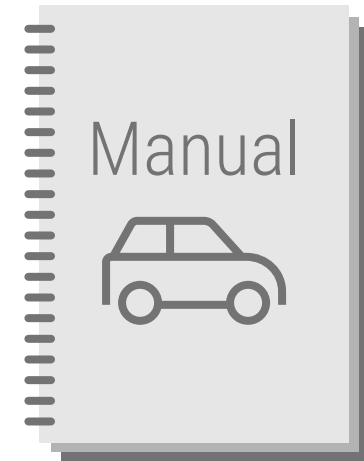
## 5. Focus on both print and digital.

But equally, there are times when customers still prefer paper. And, in the case of things like the auto industry, it often remains mandatory to have a printed glove box manual in a vehicle.

The point about centralizing customer communications is having this information all in one place, so you can make informed decisions about whether print or digital is the most suitable medium.

### DIGITAL AND PRINT IN HARMONY

A global automotive manufacturer needed to reduce the cost of printed materials, but also had to meet regulatory requirements for printed auto documents. Their solution was to make the most of both print and digital: to rationalize and streamline the documents that they absolutely needed, and then provide ultra-personalized content using a “digital glove box” based on each car’s specifications.



# Starting small.

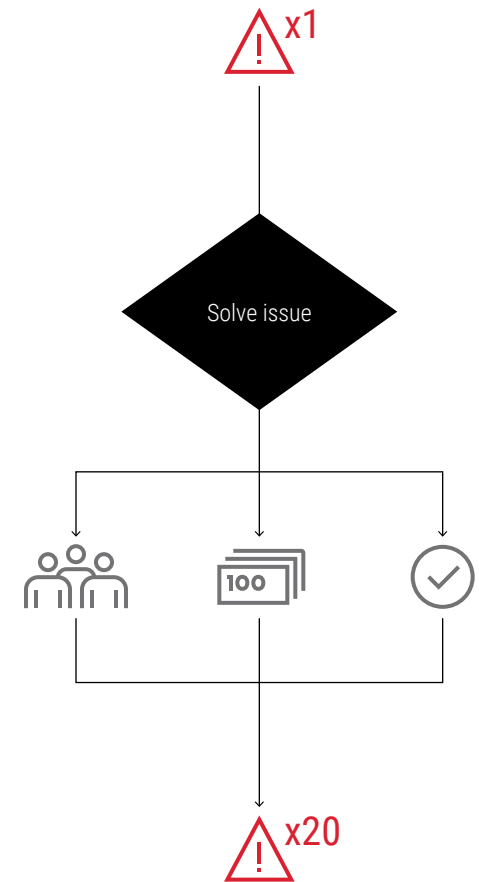
This might be the point at which you're thinking "Well, that all sounds great. But..."

We get that. Customer communications is a vast topic with lots of moving parts. Trying to change the whole thing at once feels like trying to boil the ocean.

Not only that, there are immediate practical objections, too. If you're in marketing, you might not want to battle operations and customer service into changing the way they engage with customers.

Or you might want to improve the look and design of your billing, but the cost of acquiring the tech to do it is too high. Or you might not have the right skills in-house.

The key to getting this right is starting small with something that will make a tangible difference. To get the buy-in, budget, and authority you need to make this work, start by identifying one small issue you can fix easily and prove the value.



# A case study in starting small.

A finance company was sending all of its customers a monthly statement. However, they were sure that the look and feel of that statement could be significantly improved. They knew the document was not visually engaging enough, as it only included text and numbers, and even the logo was not brand-compliant.

For these reasons, they were actively seeking a way to fully revamp this key monthly communication in a way that they would be able to add personalized content, color, and graphics. However, their operations department was using legacy IT systems to create these statements, making it hard in terms of implementation.

Instead of giving up, they outsourced their customer communication management to Xerox. This meant they could leverage their existing investments in IT infrastructure to produce and manage the data, and create the documents on the latest technology to deliver a higher-quality product.

From this starting point, the company identified a range of customer touchpoints that could be optimized, rationalized, improved, and consolidated — making their communications better while costing them less.

# You don't have to go it alone.

Transforming customer communications from the inside is tough. It's not impossible, but going it alone is likely to make your journey longer, harder, and more expensive.

It helps to have a partner. To support your planning, here are some of the crucial considerations you'll need in a partner.





# You don't have to go it alone.



## 1. CHANGE MANAGEMENT CREDIBILITY

Implementing customer communications transformation is a big deal. Even when you're starting with a small, single issue, you're rocking the boat: you're saying to people, "Your old way doesn't work anymore. Here's the new way we're going to do it."

You need a partner who can be a transformation agent, who has expertise in redesigning internal systems, and experience in working with stakeholders and employees to make change as quick and friction-free as possible.



## 2. CONSULTANCY CHOPS

You will almost certainly identify many areas where your customer communications are fragmented and could be improved. But, from inside an organization, seeing all of them is tough. And knowing the right solution to fix each problem can be complicated, too.

You need a partner with expertise in business process analysis who can provide advice and results in digital and multichannel engagement.



## 3. DATA EXPERTS

Data analytics are essential in the preparation of campaigns to understand customers and personalize content. But they're equally important post-campaign to check what went right, what went wrong, and what can be done better next time.

In other words, with data, there's no guesswork involved in getting customer communications right.

You need a partner who has the capacity to leverage data and analytics, and the expertise to apply them to your business needs.

# You don't have to go it alone.



## 4. THE RIGHT TECHNOLOGY

Technology is a huge part of customer communications. When you get it right, you're able to integrate various systems, rationalize the number of tools you need, and implement smarter solutions wherever it makes sense.

The burden of all this technological change shouldn't fall exclusively on your IT department. It helps to have a partner with the right technology, expertise, and the capability to implement with your initiative's biggest goals in mind.



## 5. DIGITAL AND PRINT EXPERTISE

Today, businesses operate in a hybrid world of print and digital, so your partner must support both dimensions. They need to be experts in color print and managing multichannel digital communications — and experts in integrating the two, so you can attain brand consistency and the highest quality at every touchpoint.



## 6. A GLOBAL PRESENCE

Enterprises that operate all over the world need a partner who can advise and provide support in multiple territories, especially when document localization is part of the engagement challenge.

# Getting Started

Customer experience is too important to get wrong, but fixing it requires more than a neat app or two. To even start to get it right, you need a holistic view of all of your customer communications and a bold approach to tackling every issue.

To solve these problems, you don't have to boil the ocean — there are clear, practical steps you can take to get started.

Analyze your own business through the lens we've described, and you'll have a clearer view of where you're struggling, what you're missing, and what you need to do next.

Great customer experience means giving your customers high quality, relevant messages at every single touchpoint.

The approach to customer communications transformation we've described here will help you get there.

# About Xerox

For more than 100 years, Xerox has continually redefined the workplace experience. Harnessing our leadership position in office and production print technology, we've expanded into software and services to sustainably power the hybrid workplace of today and tomorrow. Today, Xerox is continuing its legacy of innovation to deliver client-centric and digitally-driven technology solutions and meet the needs of today's global, distributed workforce. From the office to industrial environments, our differentiated business and technology offerings and financial services are essential workplace technology solutions that drive success for our clients. At Xerox, we make work, work.

Learn more at [www.xerox.com](http://www.xerox.com) and explore our commitment to diversity and inclusion.