precisely

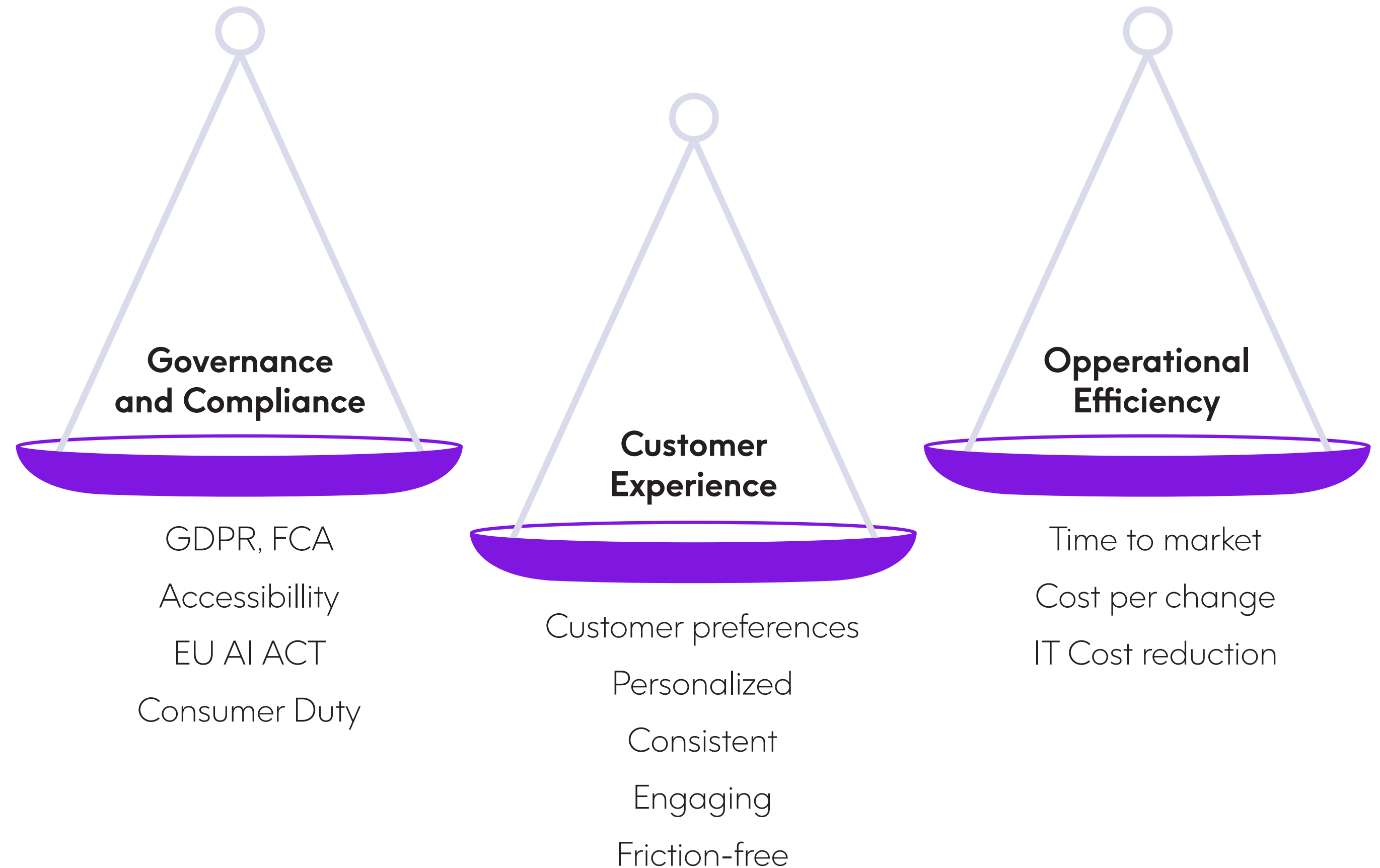# The Executive's Guide to Better Customer Experience and Compliance

Managing Customer Communications is a Balancing Act

Companies face **three major challenges** in managing customer communications: disconnected legacy systems that hinder a smooth customer experience, limited visibility into communications for compliance, and costly, time-consuming manual updates handled by IT.

This guide is designed to help leaders navigate these three areas with confidence. Whether you're focused on improving customer experience, simplifying operations, or mitigating compliance risks, this resource has the resources to help your organization in these three critical areas.

Inside, you will discover how to:

1. **Provide a Consistent, High Quality CX**

2. **Improve Productivity of Customer Communications**

3. **Manage Risk and Compliance**

Governance and Compliance

GDPR, FCA

Accessibillity

EU AI ACT

Consumer Duty

Customer Experience

Customer preferences

Personalized

Consistent

Engaging

Friction-free

Opperational Efficiency

Time to market

Cost per change

IT Cost reduction

1. Provide a Consistent, High Quality Customer Experience

54% of organizations cite fragmented or siloed data as their biggest barrier to leveraging data effectively

Being Customer Driven Requires Being Data Driven

Your customers expect smooth, consistent experiences across all communication channels. However, over 50% of organizations say fragmented or siloed data is the biggest barrier to meeting those expectations. Solving that problem requires focusing on Data Integrity and establishing a single source of truth about your customers' experiences.

What is Data Integrity?

At its core, data integrity means that all your information is accurate, up-to-date, accessible, and secure across all systems. While this might sound aspirational, it is now a fundamental requirement for delivering high-quality and consistent customer experiences.

The Pathway to Success:

✓ Connect Data and Business Systems

Achieving data-driven CCM requires focusing intensely on how, when, and by whom data is used as you design and build your systems. Start by eliminating the inefficiencies of manual CCM processes and siloed systems by connecting disparate back-end systems and data stores to a single, unified platform.

- Accessing and managing all your existing systems and data through one unified, fully integrated CCM platform enables more efficient operations and improves creative collaboration, without the major expense and disruption of replacing core infrastructure.

✓ Unify Customer Data for a 360° View of Your Customer's Experience

A fully unified CCM platform frees your organization from all the work and expense of complex data integration, including automating critically important data quality and governance processes.

- As a result, all CCM teams across the enterprise have easy access to the same current, complete, and accurate customer data, standardized content templates, and comprehensive archived communications, enabling them to coordinate more effectively, make better decisions and deliver consistently high quality CX.

✓ Make Personalization Meaningful

Fully leverage your customer data to personalize communications based on preferences, behaviors, and needs. Deliver consistent experiences across channels like email, SMS, and video.

- Your customers will experience a more comfortable, intimate, 1-to-1 relationship with your company when everyone works from the same complete and trusted view of a customer's data, including every interaction across all channels.

Ensure communications are responsive and formatted correctly for easy viewing on different devices and platforms.

- Inconsistent UI design, even on just one of the channels or devices your customer chooses, can result in negative experiences that spoil their overall relationship with your brand. Fully unified CCM platforms not only enhance and accelerate design they also help ensure consistency and reusability across channels.

✓ Continue to Monitor and Refine the Customer's Experience

Establish consistent performance metrics across all communication types (i.e. email opens, video views, chatbot issues resolved, SMS deliveries, etc.) to ensure seamless management of all your CCM channels.

- A unified interface enables more effective cross-channel comparisons and analyses while simplifying and accelerating reporting for improved collaboration across teams.

Optimize message delivery by selecting the most effective channel based on well-researched customer preferences.

- Gain visibility into individual and overall customer preferences and behaviors by carefully analyzing and comparing interactions and outcomes across channels. This includes tracking opt-in/opt-out statuses for SMS, monitoring engagement with dynamic links, and analyzing email open rates.

Precisely customers see a **3X** response rate using interactive personalized videos over other communication channels.

2. Improve Productivity of Customer Communications

OVER 40% of employees working with customer communications identified "outdated software tools" as their top source of job frustration.

Automate and Integrate Systems and Workflows

Manual workflows and siloed back-end systems result in overloaded teams and lead to inefficient use of resources. Automating just a few manual tasks and processes can result in significant productivity gains.

The Pathway to Success:

✓ Connect Communications and Processes

Effective communication and seamless handoffs between IT and CCM teams across the enterprise are essential for enhancing CX. When everyone is collaborating in a fully unified CCM platform, they all share a single, reliable source of the truth regarding vital CX data and insights, which drives more consistent CX across all channels and touchpoints.

✓ Reduce Reliance IT Resources

No matter how vital they may be, CX priorities will always have to compete with other corporate demands for increasingly scarce IT labor and management resources, including capital budgets.

With a highly automated, seamlessly integrated CCM platform as your technology base, both IT and CCM productivity improves, due to greatly reduced IT involvement in performing daily CCM tasks such as campaign email code testing or managing archives of customer contact records and document delivery.

> ## Precisely customers have reduced the time needed to make a change from 90 days to just 90 minutes

✓ Simplify Workflows Across Teams

By consolidating management of multiple separate CCM channels into a single interface, everyone has access to the same, real-time information regarding customer communications and interaction histories, including recent purchases and product reviews, details of currently active support inquiries, and more.

The ultimate results:

- Customers experience a more seamless and authentic relationship with your company
- Strengthened employee empowerment and sense of ownership of the results of their actions and decisions
- Improved collaboration and decision-making across teams and lines of business.

✓ Automate Repetitive Tasks

Routine tasks such as generating reports, managing customer communication templates, and archiving data can be automated, allowing employees to focus on higher-value creative and strategic activities.

- Bring intelligent automation and control to bear on communication design cycles and routine tasks such as generating reports, reviewing newly created messaging and communications and maintaining customer communications archives.
- Automating such repetitive manual processes and tasks improves the value of your employees' work product by freeing them to focus on more creative and strategic objectives.

3. Managing Risk and Compliance

84% expect to face increasing regulatory expectations and scrutiny in the next two years

Automate and Streamline Regulatory Compliance

Especially within regulated industries, Customer Communications are fraught with regulatory compliance risks. People and systems across the enterprise, including both CCM and IT teams, are constantly accessing and creating high volumes of sensitive, personally identifiable customer data, for use in communications as well as for analysis and reporting.

With a unified and integrated CCM platform, compliance workflows are both strengthened and accelerated by replacing risk-prone, manual processes with consistent, automated management of critical functions such as document version control and archiving, enforcing document template standards, tracing and reporting data lineage, and more.

The Pathway to Success:

✓ Unify Compliance and Data Governance Tools

Establish streamlined, secure and automated compliance management workflows that work seamlessly across multiple legacy systems and applications.

- Easy to use automation enables project managers to assign clear and auditable tasks to compliance subject matter experts and decision-makers. The assigned workflow includes side-by-side comparisons that highlight exactly what has changed between template versions, which that clarifies and accelerates oversight efforts.

- Fully automated version control features enable fast, reliable, and auditable system-wide rollbacks to previous versions easily, whenever necessary.

✓ Automate Compliance and Version Control

One simple human error during manual revision of a frequently accessed template, if not caught and corrected quickly, can easily propagate across multiple cycles of content re-use and revision. Automating oversight and control of templates and copy standards prevents costly errors while reducing time to delivery.

- A unified CCM platform automates version tracking and assessment of new and revised customer communications, providing instant visibility into communication logs and trails, and enabling quick responses to compliance audits or investigations.

- Mitigating risks in real-time simplifies compliance with complex regulatory requirements by providing actionable, real-time alerts when content does not conform to established templates or unapproved changes are made to protected sections of text.

✓ Manage Data Access

Minimize the risk of accidental or intentional misuse of sensitive information by enabling role-based access controls that ensure only authorized users can view or edit specific data and communications.

- Automated data access management improves collaboration across teams by ensuring that users have easy yet secure access to all the data they need, provided in directly usable formats that eliminate slow and error-prone manual data manipulation steps.

- Content creation, updates and approval cycles are all streamlined and accelerated when everyone has confidence that the data involved was properly sourced and is correct and compliant with standards and regulations.

- Automating the enforcement of role-based data access permissions also simplifies and strengthens customer data security management for more consistent and robust compliance with key data privacy regulations and tighter integration with your organization's SIEM platforms.

✓ Track Everything with Ease

Automated, real-time tracking of compliance is also essential. A fully effective, unified CCM platform reduces the potential for compliance errors through automated tracking, delivery tracing, and archiving.

- When every communication across all channels and customer touchpoints is automatically tracked, reported, and archived, you're able to more easily prove compliance:
  - Who sent each document?
  - To whom and when?
  - In which version?
  - For what process or task?

  Having ready answers to detailed questions such as these is particularly crucial for companies in highly regulated industries where detailed tracking of both technical and business data lineage is essential.

- Automated archiving of all as-delivered versions of communications simplifies continuous data governance, auditing, and protection, while making the most complicated industry regulations easier to follow, even in a rapidly shifting regulatory environment.

Precisely customers are tracking over 1,200 changes across 30M communications per year for end-to-end visibility on all communications

How To Get Started

Your top priority is ensuring that your customers have a high quality, truly personalized experience whenever and however they interact with your company. But when you bring all of your existing systems, applications and data stores together within a fully unified CCM platform, consistently excellent CX is not the only positive outcome.

Simplified and streamlined workflows also increase the speed and quality of collaboration between CCM teams, resulting in improved productivity and faster deliveries across all channels. In addition, built-in data quality and governance management, data privacy and access control, and automated oversight of document and template standards combine to deliver assured regulatory compliance at every step.

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About Precisely

As a global leader in data integrity, Precisely ensures that your data is accurate, consistent, and contextual. Our portfolio, including the Precisely Data Integrity Suite, helps integrate your data, improve data quality, govern data usage, geocode and analyze location data, and enrich it with complementary datasets for confident business decisions. Over 12,000 organizations in more than 100 countries, including 93 of the Fortune 100, trust Precisely software, data, and strategy services to power AI, automation, and analytics initiatives. Learn more at www.precisely.com.

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