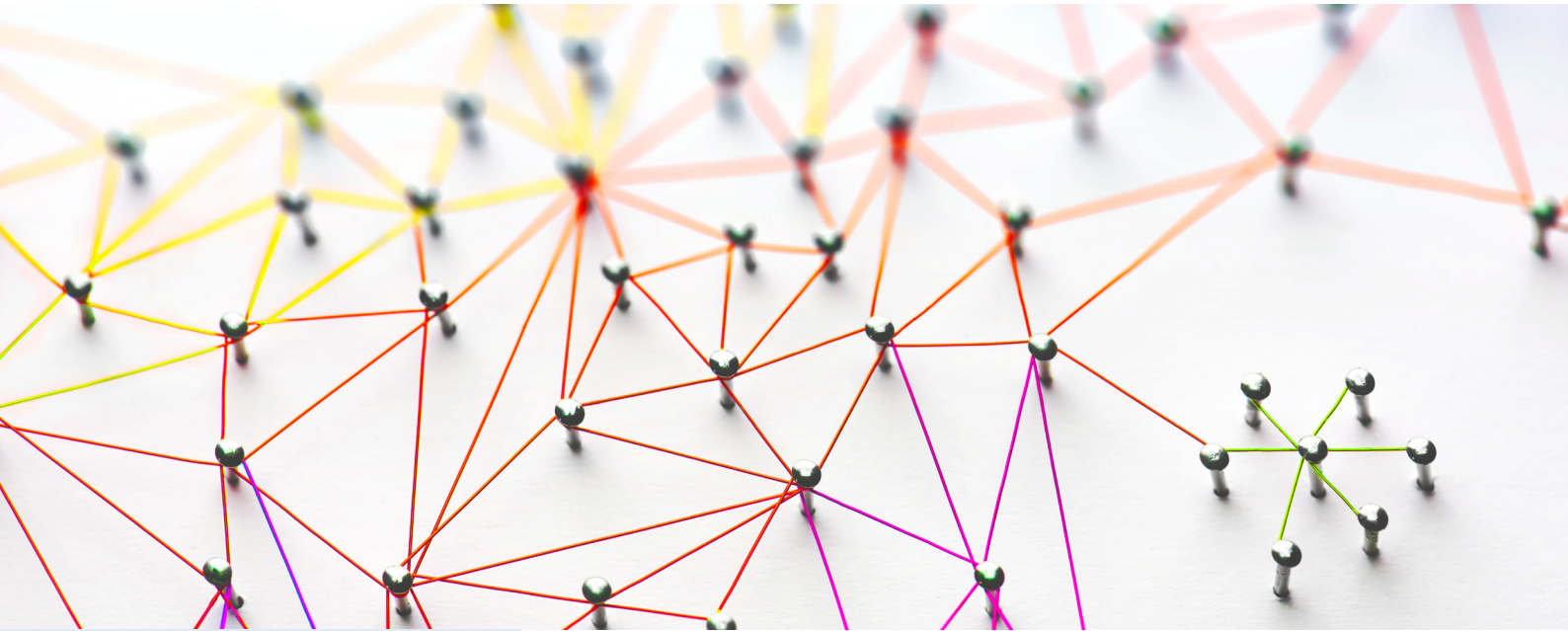# opentext™

Solution overview

OpenText™ Exstream and OpenText™ InfoArchive

Enhance regulatory retention, audit response and customer access for customized customer communications

- Save time and money through fast, easy and flexible business communication generation

- Enhance compliance for regulatory reporting, retention, holds and audits

- Improve customer satisfaction via easy long-term access to documents such as statements, case updates and invoices

- Provide personalized communications in customer-preferred delivery channels and formats

Enterprises face the constant challenge of managing the overwhelming amount of content created during everyday business activities. Customer communications are a significant contributor to this information deluge, accounting for much of the 150 billion mail items delivered each year in the United States alone.[1] This enormous volume of content coupled with increasing regulatory pressures and expanding data privacy laws challenges enterprises to adopt compliant procedures and technologies as well as engage with customers and vendors.

To solve this business problem, enterprises are implementing customer communication management (CCM) and compliance repositories. Together, OpenText Exstream and OpenText InfoArchive provide a solution that is not only vital to the creation, compliance and preservation of customized customer correspondence (statements, case updates, invoices, bills, correspondence, adverts) but also provides key support for regulatory compliance as well as customer-facing and internal business processes. This integrated solution can solve critical challenges for highly regulated industries and for compliance with the GDPR or other privacy regulations.

[1] https://about.usps.com/who-we-are/postal-facts/postalfacts2016.pdf.

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Save time and money with automation

Exstream's streamlined processes and communication efficiencies help enterprises make time for other critical business tasks. According to an OpenText conducted survey, by automating the insertion of relevant information and graphics from connected data sources, companies typically reduce document development time by more than 70 percent and processing time by an average of 77 percent. They also see a reduction in errors through automated processes such as bulk updating of contact information or ensuring the latest version of compliant documents are distributed appropriately. The Exstream platform ensures the correct assets are delivered accurately and consistently. When Extsream is coupled with InfoArchive's automatic archiving abilities, companies can reduce their customer communication system storage needs and increase their performance and backup times, saving time and money.

Enhance compliance with archiving

Federal and state regulators are examining all customer communication from various industries to ensure that institutions are not deceptive or abusive toward consumers. They are also interested in how enterprises are managing the personal information of their customers, vendors, prospects and employees. Their objective is to set the foundation for clear and consistent communication, ensuring that the consumer can conclude they are engaging in a relationship of trust and that their personal information will not be exploited or misused.

InfoArchive automatically archives all customer communications, giving enterprises a single platform that provides multiple retention and disposition policies, the ability to search and produce reports across multiple content types and audit, chain of custody and eDiscovery capabilities. Together with Exstream, these abilities not only enhance compliance but also increase efficiency in responding to regulatory demands.
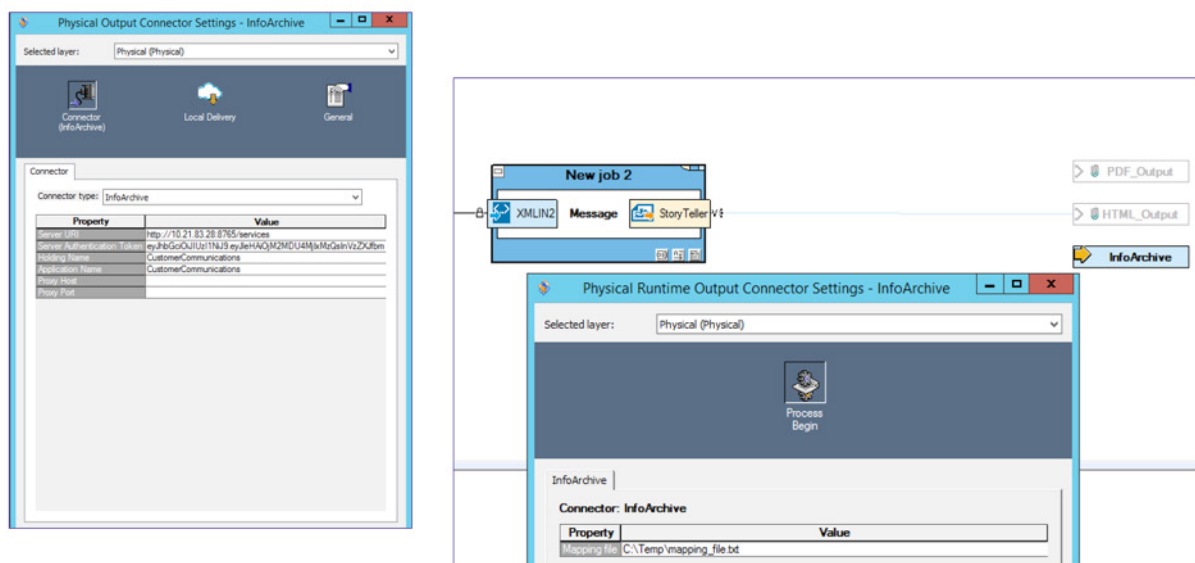

Figure 1: Solution diagram

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Improve customer satisfaction with superior communication

Customer and vendor experience is one of the biggest drivers in either keeping an enterprise alive and thriving or driving it out of business. An exceptional customer communication experience should be the goal of both marketing and compliance. Exstream is an omnichannel customer communication management platform that leverages any data and content you already have, transforming customer communications into highly personalized, engaging, connected customer experiences. Business users can control the content they know best and react quickly to market changes through the design and delivery of ultra-personalized, consistent, compliant communications, without depending on IT to create templates.

Additionally, enterprises are increasing customer satisfaction by providing web-based access to past communications, statements, invoices, cases, etc. By archiving all completed customer communications in the InfoArchive platform, communications can be securely accessed via a customer portal. InfoArchive can provide secure and instant access to multiple years of communications without impacting production environments.

Provide multichannel, personalized communications

There are a multitude of parameters that prescribe what customer documents are required, when they must be delivered and through what channel they should be sent. Whether it's immediate production or batch runs, Exstream can integrate requirements to automatically generate and distribute multichannel communications to meet customer preference. This can be accomplished in real time or at any other moment when a designated action occurs. This increases customer satisfaction and retention as well as reducing the company's cost of communication.

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