Communications Center CRM Enhanced CRM Communications

# Summary

**The Web-based CRM Communications Accelerator** *that turns your Line of Business users into Marketing Machines.*

## Solution

## OpenText Communications Center CRM Positioning Statement

OpenText Communications Center CRM, as a core component of OpenText Customer Communications Management, provides intuitive tools for creating, managing and delivering communications of all types, to maximize business efficiency and agility working directly from your business’ CRM solution. By linking all contributors and processes to the data held in all the businesses systems of record, Communications Center CRM improves customer experience related to ongoing correspondence and drives out unnecessary costs and errors associated with communications.

**Solution:** Communications Center CRM utilizes its unique Interactive Correspondence, which embeds dynamic content in communications to directly engage recipients, turning documents into dialogues. Even high-volume transactional bills and statements are enlisted to enrich and extend the Customer Life Cycle and maximize Customer Lifetime Value.

Customer communications become the vehicle for extending the conversation and deepening your relationship with your customers, between sales engagements.

Communications Center CRM is available on-premises, in the Cloud or in hybrid deployments, with fully embeddable functionality to link your front-end and back-office processes, people and data so that you can speak with your customers, partners and vendors with one voice, in real-time, across every channel.

**Technology**: OpenText Communications Center CRM is tailored to address the needs of leading CRM systems such as Salesforce, Oracle, Microsoft and SugarCRM. CC CRM is deployed in a SaaS Cloud model to match its CRM host.

The five key features of Communications Center CRM are:  
1. Immersive Authoring  
2. Unified Styling  
3. Multi-tenant Aware Architecture  
4. Analytic for Application Events  
5. Secure Document Signing & Delivery

**Uniquely Differentiated**: OpenText Communications Center CRM (CC CRM) provides the tools essential to enable an enterprise-wide Communications Hub. Unlike our competitors that have built their CCM solutions to focus on print and document output, CC CRM links your critical front-end and back office business systems (ERP, ECM, CRM, WMS, CMS…) to design templates, apply process and workflow, and provide a simple to use web-interface to enable business users to create and deliver communications that are personalized and customized to match the recipient’s preferences. Furthermore, these services can be provide as native applications or embedded within those systems of record, extending the way they do business today. And uniquely, OTCC can be delivered traditionally, on premises, in the Cloud (private or public) or in a hybrid deployment.

## Target Customer/Market

Communications Center CRM has traditionally been focused on Utilities (including Telco), Supply Chain (including Logistics & Distribution, Manufacturing and Retail) and has gained traction with Financial Services and Insurance and Government segments where there is a strong emphasis on accelerating Customer Onboarding and improved cost savings and customer experience via Self-service. We generally come into a business via senior level managers in IT and Operations, who typically buy and deploy CCM solutions. Lately we've seen a great deal of LoB users including Marketing leads, particularly Chief Experience Officers or other titles responsible for systems of record (front-end or back office) that connect with Communications Center.

## 25-Word Description

## OpenText Communications Center CRM is designed to meet business needs of transforming inefficient, manual and siloed document-based systems into a highly effective enterprise-wide communications hub.

## 100-Word Description

OpenText Communications Center CRM is designed to meet business needs of transforming inefficient, manual and siloed document-based systems into a highly effective enterprise-wide communications hub.  
Successful businesses recognize the importance of efficiently managing all their communications; from documents to emails, PDFs to texts, contracts to correspondences. Every customer, partner, vendor and employee interaction involves communication of some type. Whether high-volume and transactional or personal and one-to-one, businesses need to improve the design, production, clarity, delivery and effectiveness of communications to stay competitive and close to their clients. From concept to creation, distribution to delivery, through archiving and retrieval communications management is key to succeeding in a digital market place.

## Top 3 Messages:

|  |  |
| --- | --- |
| Message 1 | **Communications Center CRM simplifies and accelerates the process of creating and sending rich communications to improve business effectiveness.** All of Communications Center’s web applications are now HTML5-based with a simpler, more intuitive look & feel. More importantly Communications Center CRM functionality can be surfaced inside the user’s application of choice so that users can easily generate powerful communications directly from within the CRM, ECM, ERP or other application that they work from on a regular basis, on their desktop or mobile device. Not having to learn a new tool or be bound a desk provides greater flexibility and increased efficiency. |
| Message 2 | **Communications Center CRM helps content creators, graphics designers and LoB users focus on the job they do, while insuring the highest levels of flexibility, consistency, productivity and collaboration.** Marketing can centrally design and manage style sheets for individual audiences and channels, to be applied to a single or multiple templates, which means that Line of Business users can easily select templates and create content without concern for styling. Styling is automatically applied downstream, once the recipient and delivery channel is selected. The styles are easily updated and expanded. The result is increased productivity because LoB can create communications without worrying about styling and greater market responsiveness, with higher impact from designs that reflects the audience's needs and preferences. |
| Message 3 | **Communications Center CRM provides the feedback needed to optimize performance and impact of all an enterprise’s communications.** Marketing owners gain greater control and insight into the production and consumption of communications from its embedded analytics, which monitor and display real-time performance via easily configurable dashboards. Reports increase the value and impact of communications. Performance reports range from document generation throughput, to the usage reports of templates, styling and content stored in CAS, to reporting feedback from all electronic multi-channel communications help to increase the system's efficiency in producing those communications. |

## Market Background

## Market Snapshot

Customers continue to gain more control over the time, place and manner of interacting with companies and brands, that includes an expectation of immediate service at lower prices, driving a digital experience imperative in most organizations. Combined with the threat of a new generation of competition, born in this digital age, working in a new paradigm and with greater agility. Business must engage in their own digital transformation to improve their performance, secure & enrich their customer base, utilize every touchpoint as an opportunity to deepen their relationship with their customer.

## Market Trends that Drive the Need

1. **Increased competition**

In a slowly recovering economy, there is the increased need to directly engage with and maintain every customer while making sure every opportunity for cross-selling is being utilized. In highly competitive market climate, existing customer offer a much better ROI than acquiring new customers.

1. **Movement towards electronic communication**

Due to the preeminence of Web-based interactions, social computing, mobile communications, and other advances in technology, a large percentage of customers / users have become comfortable with the electronic lifestyle. In fact, many want electronic communications over other means because they are more interactive and immediate, rather than one-way and delayed.

1. **Cost & Efficiency Improvements**

Businesses are facing increased pressure that drives down margins. Operations managers seek to eliminate non-value added costs and steps and accelerate order-to-cash. Additionally, M&A activity as well as consolidation continues to accelerate creating the need to centralize and replace outdated or siloed systems across the enterprise.

1. **Age of the Customer**

With a dramatic shift in Customer Journey model, the vendor is only directly engaged in the final stages of purchase. This means that it’s harder to attract, influence and close business. Social media has a greater impact on sales, which increases the importance of Customer Satisfaction. In a highly competitive market climate, existing customers offer a much better ROI than acquiring new customers. Continuing the conversation, with exceptional customer service, experience, and satisfaction are critical to customer retention and developing customer advocates.

## Positioning & Messaging

## Net Takeaway

## OpenText Communications Center CRM provides the enterprise-wide Communications Hub that unifies all your key business correspondences, internally and externally, to provide real-time, interactive engagement at every customer touchpoint and every business exchange with communications that count.

**OpenText Media Management DAM helps companies enhance their investment in brand value, customer experience and digital media with technology to manage and control brand assets, video and rich media throughout the enterprise. Enabling you to optimize resources, efforts and budgets in an organization-wide strategy that delivers on your brand promise.**

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| --- | --- | --- | --- | --- |
| Customer Value Propositions: | | | | |
|  | Value Prop 1 | Value Prop 2 | Value Prop 3 | Value Prop 4 |
| Customer Need | **Competitive Advantage**  Maximize the impact of every customer communication and engage more profitably with them by leveraging personally relevant information at touch-points ranging from one-on-one contact to high-volume, mass-produced documents.. | **Omni-channel Enabled Communications** **Driven Throughout the Enterprise** Give business users hands-on control of the documents and tools they need to run the business, and simultaneously relieve the demands on IT for change requests and support. A communications system that delivers consistent messaging through every medium the customer wants, and works as its users need it to, not as IT says it must. | **Improve Margins via Cost & Efficiency Improvements** Streamline document-related business processes to lower cost and speed performance through simplified and automatic document execution and handling, with a solution offering simplified deployment and management. | **Maximize Customer Lifetime Value, seamlessly engaging customers through every stage of their lifecycle.** Increase effectiveness of communications and convert them from information sources to information exchanges in which the document becomes a portal between the customer & company: offers, support, create a bridge from the last to next transaction. |
| Customer Benefit | Use each correspondence to deepen and expand your relationship with your customer, and provide a simple, frictionless path from the last engagement to the next, with offline communications that match your online experiences. Cost-effective, targeted and engaging customer communication results in more effective cross-sell / up-sell opportunities. | Communications Center CRM is powerful enough to meet the breadth of communications needs across your enterprise, in a single CCM solution. It offers out of the box integration with Process Suite for unparalleled process management to automate your communications flows, particularly with high-value, complex documents such as contracts. This provides for review and approvals cycles and flexibility where it’s needed. And with its web-based tools to exercise templates and customize content, including rich-media assets from OpenText Media Management, Communications Center CRM brings powerful correspondence tools directly to LoB and marketing departments. | Improve logistical support via automated document handling and delivery. Reduce cost and rapidly respond to business needs while improving customer service. As your business moves to the Cloud, Communications Center CRM will move with you, providing options for 100% Cloud or a hybrid Cloud/On-Prem deployments. | Communications Center's Interactive Correspondence lets you embed rich-media and dynamic elements that inform and engage customers, providing a better, more informative experience. Interactive objects can be used to capture attention and convert it to action by providing opportunities for customers to request further information or order products, engage support services or send feedback directly from within the communication itself. |
| Proof Points | AmerisourceBergen Corporation uses StreamServe to automatically route and process tens of millions of documents a year to significantly improve the delivery of “driver-ready” materials. Savings realized by ABC are estimated to be about $2M per year. | By segmenting the customer base and then sending each group targeted direct marketing messages, DONG Energy went from an expected hit rate of three percent to an actual hit rate of 20 percent. “It surpassed our expectations. The response is more in tune with direct marketing than mass marketing, and I think the clear response is seen in the high hit rate...Also, I think it is just the fact that people felt we were talking to them directly,” - Torben Christiansen, IT, Sales & Services, DONG Energy | “Bill cycle times for consumer accounts have been reduced by more than half, from an average of eight hours to just three. Enterprise account cycle time reductions have been even more dramatic, from two and half days to just six hours.” Mohamed Hichem Saim, Senior Manager Invoicing & Publication, du | FWD uses Communications Center CRM to achieve its vision to change the way people feel about insurance, by creating more personalized and meaningful communications that speak to their customers with a consistent and responsive voice. "This has been a dream product. We save almost $1.4M per year. It helps us communicate effectively and efficiently across different markets, languages, national borders, and distribution channels. That represents a great investment for us."  — George Wan, VP of Information Technology, FWD Life Insurance (Bermuda) Limited |

## Key New Features in OTCC v16:

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| Feature | Customer Benefits |
| Web Designer UX - Redesigned responsive HTML5 based embeddable and extensible user interface for document authoring | - Simplified, more intuitive UI makes it easier for new users to get started earlier and to be more productive - Existing OpenText customers will recognize the familiar look & feel of CCM, making adoption easier, with less training required - IT departments can customize the UI to add their own functionality to customize CCM to meet their company's needs and be even more productive with their existing applications - Developers can tap the benefits of our CCM platform to build custom solutions for their customers or constituents, providing better customer experience as well as a stronger revenue stream |
| Immersive authoring - Complete IT control to surface functions, in user’s application, at the appropriate stage, as appropriate to their role. | - Via the new UI, customers can surface specific CCM functionality within the tools they already use, to meet their business users unique needs, so that they don't have to learn the CCM application to take advantage of its benefits - Features and services can be selectively presented or hidden, which insures that content users only change the content that should have access to, ensuring content integrity. |
| Unified styling - Separation of content and presentation layers, where centralized styling provides simplified management (updating & control)  for brand consistency. IT defines processes, marketing designs templates & styles, LoB selections their recipients and communications, adds content and | - Communications Center CRM maximizes the effectiveness of Communications not only by providing a single, consistent look & feel across all devices, but because the channels are linked, a customer can initiate an application from their email reader and complete it on their tablet at a later date. - Content designers and LoB users create once and distribute many times, without having to restyle communications for each outlet. Marketing controls the design and message. Sales decides who to deliver it to and when. |
| Analytics for application events - Analyze effectiveness of communications and the communications process: What’s used when & where, how its created & delivered, through which channel & to whom, what's been engaged, at each point of customer-interaction. | - Content creators gain insight into what content is being used in communications to create the best possible assets and messages - Monitor CCM events to insure maximum system performance, throughput and react quickly to problems as they arise - Sales and marketing get a fuller picture of their efforts by including communication metrics in their analytics, to maximize the effectiveness of campaigns and communications |
| Multi-tenant architecture - Facilitates new Cloud-based and on-prem deployments such as SaaS or multi-instance with independent metadata model with versioning, persistence layers, schemas, etc. | Optimized value and services for 4 use cases: - Shared services for internal clients reduces costs and labor because a single system support many departments centrally, while respecting rules of governance between those departments - 3rd parties offering shared services for contract customers: Companies increase margins by support different customers with a single system that is highly scalable - SaaS in the OT Cloud: Customers preferring to exercise SaaS-based CCM solutions trust OpenText to provide secure, cost-effective services. - Public Cloud hosting: CC functionality can be deployed in the most cost-effective solution that meets their needs |
| Common Asset Service (CAS) - Centralized service for managing all CCM information resources, including templates, text fragments, style sheets, etc. | - Marketing can save time and effort, while insuring consistency within all their communication channels and templates when assets are managed centrally. - Content users save time and effort by having one place to for assets created for them or re-using assets that they've previously created or used - New templates can be easily modified, versioned and deployment to insure timely and effective communications |
| OTDS Integration for Authentication and Single Sign-On (SSO) - Permits access to all OT applications as well as other synchronized customer applications, with groups matched to pre-defined CC roles. | - Users can move in and out of all OpenText applications or other corporate maintained solutions with a single password, to work as productively as possible - IT managers can insure that users and data are secure and that its as simple to manage individual or group permissions centrally and easily |
| Secure Document Signing - The most complete set of options to provide digital document authenticity. | Communications Center CRM addresses the need for secure document signatures to enable the inherent value of electronic documents over paper-based documents. |

## Qualifying Questions (Provocative question: Do you experience this business challenge?)

1. Qualifying Question 1 – Do you currently have a single CCM system providing communications that align to your corporate objectives in terms of branding and consistent messaging, performance and scale; one which connects all your data systems of record and meets IT standards in ability to make changes simply and effectively?
   1. CCM should be an Integrated Business Service. Communications Center CRM provides the Enterprise Communications Hub, levering existing and future infrastructure to provide the common 'voice' of the business, tying departments, their multiple systems of record and data together to deliver a consistent and exceptional experience throughput the entire Customer Lifecycle.
2. Qualifying Question 2 – Do you provide your line of Business users with services in which they have direct control over outbound correspondence, without any IT intervention?
   1. Communications Center CRM is "Fit for Purpose". It provides Immersive Authoring and Unified Styling which enable community owners to utilize CCM to simply and effectively manage their messages and channels, to customers, prospects, employees, vendors and partners, without having to worry about design, styling or compliance.
3. Qualifying Question 3 – Have you considered utilizing with Interactive Correspondence in other stages of your Customers Life Cycle to improve customer experience and increase loyalty?
   1. Communications Center CRM extends Batch Document Production to facilitate the conversion of correspondence into conversations by utilizing interactivity in its creation and consumption, and empowering business accelerators like Customer Self-Service and On-Boarding.

## Key Competitors

Customer Communications Management (CCM), as product category, emerged over 30 years ago, to address transactional, high-volume batch production print output. Today CCM solutions are multi-channel and strive to encourage delivery via digital channels for cost savings and efficiency improvements. CCM helps make businesses language more consistent and compliant with company policy, and makes output from core systems a part of the customer experience.  
  
Innovation continues to give CCM life and drive enterprise investment. These include:

* Addressing broader customer experience goals
* Increasing focus on interactive statements and communications that engage
* Stronger support for the iWorker with customer correspondence created on-demand and often from mobile devices
* Responsive design and broader mobile capability

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#### Neopost GMC

Neopost GMC has a strong background in production print, particularly with print vendors servicing the insurance and finserv markets as such they're feature set has always supported rapid ingestion and formatting of customer data, with automated field mapping. Their flagship product, Inspire has good product capabilities and features – authoring, document composition, and analytics. Its quick to deploy and purports to have low services requirements. However, this doesn't hold true for deployments outside of their sweet spot, which rely on their offshore services group to manage customizations that can be costly and time consuming.

OpenText wins in commercial markets or engagements where integrations to ERP, CRM or ECM solutions are critical. Our library of connectors is the industry’s largest and Out of the Box (OOTB) integrations mean after, more reliable deployment for these areas. Additionally, Communications Center CRM is highly configurable and Release 16's Immersive Authoring and Unified Styling provides a much stronger choice for customers looking to put CCM features in the hands Line of Business Users.

#### Thunderhead, Smart Communications

Thunderhead bills its Smart Communications CCM solution as the only pure Cloud-based CCM solution in the market, which is untrue. In fact, in the past this shift to the Cloud resulted in many customers seeking other on-premise, or hybrid solutions, including OpenText’s offerings. However, they have been regarded as having the strongest Cloud strategy of CCM vendors. Among their reported 300 customers are PNC and Deutsche Bank.

They have strong interactive elements, with a contemporary look and feel, with real-time preview and editing. Compared with the rest of the vendor field, its design capability is nearly fully featured in a thin client and includes collaboration features.

Partnerships are important to filling gaps not directly addressed by Thunderhead, with 49 partnerships including Guidewire Software.

Thunderhead recently split out ONE Engagement Hub, their customer engagement, personalization and analytics solution, into a separate division. The approach may have temporarily stalled CCM momentum, which Thunderhead has reinstituted with the cloud direction and corporate reorganization.

OpenText rarely sees Thunderhead outside of FinServ and Insurance, and commercial engagements where integrations are needed. Exstream generally wins in Financial Service and Insurance engagements in the Americas. However, Thunderhead has recently hired several key sales resources away from Exstream and has refocused on Americas. Their range of functionality, integrations and ability to directly support their customer is very limited and has been strategic advantage for us.

## Key Differentiators

1. Thing that Sets Us Apart 1 – Communications Center CRM simplifies and accelerates the process of creating and sending rich communications to improve business effectiveness. All of Communications Center’s web applications are now HTML5-based with a simpler, more intuitive look & feel. More importantly Communications Center CRM functionality can be surfaced inside the user’s application of choice so that users and easily generate powerful communications directly from within the CRM, ECM, ERP or other application that they work from on a regular basis, on their desktop or mobile device.
   1. Not having to learn a new tool or be bound a desk provides greater flexibility and increased efficiency.
2. Thing that Sets Us Apart 2 - Communications Center CRM helps content creators, graphics designers and LoB users focus on the job they do, while insuring the highest levels of flexibility, consistency, productivity and collaboration. Marketing can centrally design and manage style sheets for individual audiences and channels, to be applied to a single or multiple templates, which means that Line of Business users can easily select templates and create content without concern for styling. Styling is automatically applied downstream, once the recipient and delivery channel is selected. The styles are easily updated and expanded.
   1. The result is increased productivity because LoB can create communications without worrying about styling and greater market responsiveness, with higher impact from designs that reflects the audience's needs and preferences.
3. Thing that Sets Us Apart 3 – Communications Center CRM provides the feedback needed to optimize performance and impact of all an enterprise’s communications. Marketing owners gain greater control and insight into the production and consumption of communications from its embedded analytics, which monitor and display real-time performance via easily configurable dashboards.
   1. Reports increase the value and impact of communications. Performance reports range from document generation throughput, to the usage reports of templates, styling and content stored in CAS, to reporting feedback from all electronic multi-channel communications help to increase the system's efficiency in producing those communications.

## Customer Evidence

## Success Story 1 – FWD Life Insurance strengthens relationship http://www.opentext.com/customer-stories/customer-story-detail?id=1130

## Success Story 2 – KPN telco realizes 60% IT cost savings http://www.opentext.com/customer-stories/customer-story-detail?id=1085

## Success Story 3 – AmerisourceBergen streamlined document generation process steps by 80% and cutting overall document generation time by two-thirds http://www.opentext.com/customer-stories/customer-story-detail?id=794

## Success Story 4 -- DONG Energy accelerates direct marketing campaigns and responds to competition within twenty-four hours http://www.opentext.com/customer-stories/customer-story-detail?id=791

## Reasons to Upgrade

## Keywords for SEO

1. Customer Communications Management
2. Customer Communications
3. Document Output
4. Interactive Forms
5. Interactive Correspondence
6. High Volume Product Print

## Sound Bites for PR

1. Quote(s) from expert and/or
2. Statistic(s) with source.