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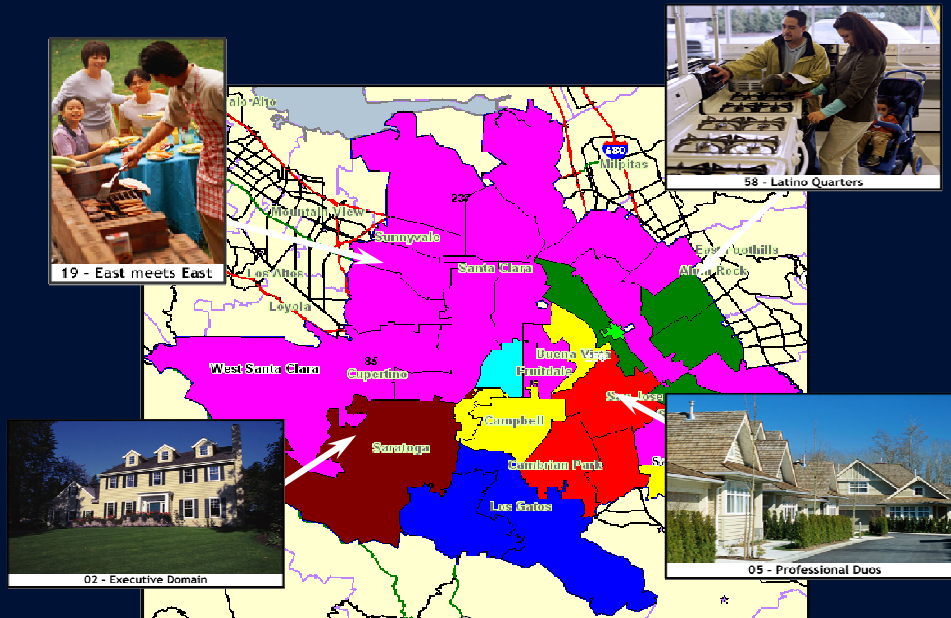
# Effective Strategies for Unifying Customer Communications

# Session Agenda

- The power of transactional communications
- Typical weakness in channel management
- Customer connections and preferred delivery
- Strategy and Technology
  - Unifying content across all channels
  - Increasing relevance with rules-based logic
  - Digital and mobile delivery
- Transform customer engagements to profit

# Transactional Connections

*"... transaction documents are better read and understood than direct mail, since they are often part of a trusted relationship between a supplier and consumer."*



Source: InfoTrends Reports - Trans Meets Promo: A European Perspective, Oct 2009

# Transactional Evolution

- Billing statements
- Renewal agreements
- Settlement notifications
- New product orders
- Product change confirmations
- Daily activity statements
- Product portfolio booklets

# Why Transactional Based Marketing Works

- Unrivaled Open-ability - 95% are opened
- High Involvement - Receive more attention (3 minutes)
- Trusted Media - Nearly everyone trusts postal service and company already doing business with.
- Functionality - Viewed more than once.
- Greater Returns - Already mailing statements, more cost effective
- 5% increase in current customer business can translate into as much as a 50% increase in bottom-line\*

# Customer Connection Points

- Call center – Next best action, guided selling
- Websites – Customer self-service, PURL, GURL,
- Email – Rich relevant content
- SMS/MMS – Notifications
- Print and mail – IMB tracking
- Mobile applications – Dedicated functions
- Social interactivity – Status triggers

# Weakness in Channel Management Tactics

- Each interaction managed as single event
- New media and technologies makes managing communications difficult
- Silo'ed communication channels cause poor customer experience.
- Properly synchronizing and integrating appropriate data
- Transforming touch points into two-way dialogues

# Unified Voice Across All Channels

## Strategy and Technology

- Strategy
  - Centralize all communications that reach customers
- Technology
  - ECM – Centralized content store
  - BPM – Business process manager
  - Change Management
    - Desktop Publishing
    - Word Processing
    - Graphics
    - Web Design
    - P/G URL Generator
    - Variable Data (Direct /Transactional)

# Increase Relevance with Rule-Based Logic

## Strategy and Technology

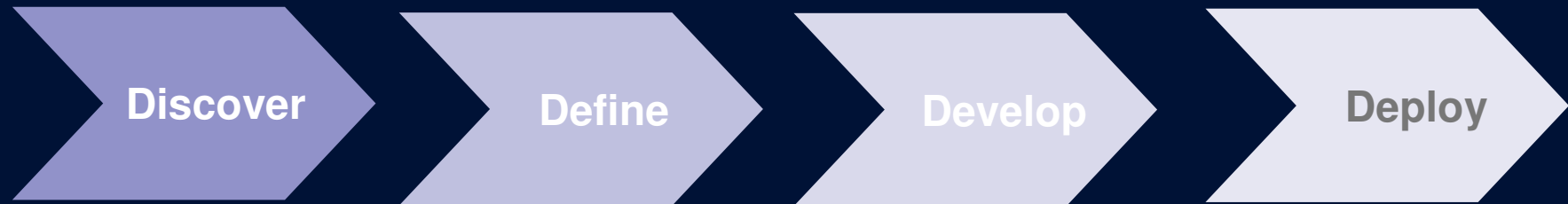
- Strategy
  - Know the complete picture of customer base and understand the distinguishing characteristics by LOB
- Technology
  - Business Intelligence
  - Campaign Management
  - Segmentation
  - Uplift Optimization
  - Messaging and Advertising Creative
  - Variable Data Composition
  - Channel Preference Delivery

# Power Up with Digital and Mobile

## Strategy and Technology

- Strategy
  - Replace costly and non-effective communications delivery with alternative methods
- Technology
  - Create-once-deliver-many composition
  - Delivery platform that supports web, email, print, +
  - Ability to deliver batch, on-demand, and interactive communications
  - Effective use of color technologies in both print/electronics
  - Tracking technologies like IMB, QR, and 2D/custom
  - Mobile application store

# Unifying Communications : *end-to-end* Delivery



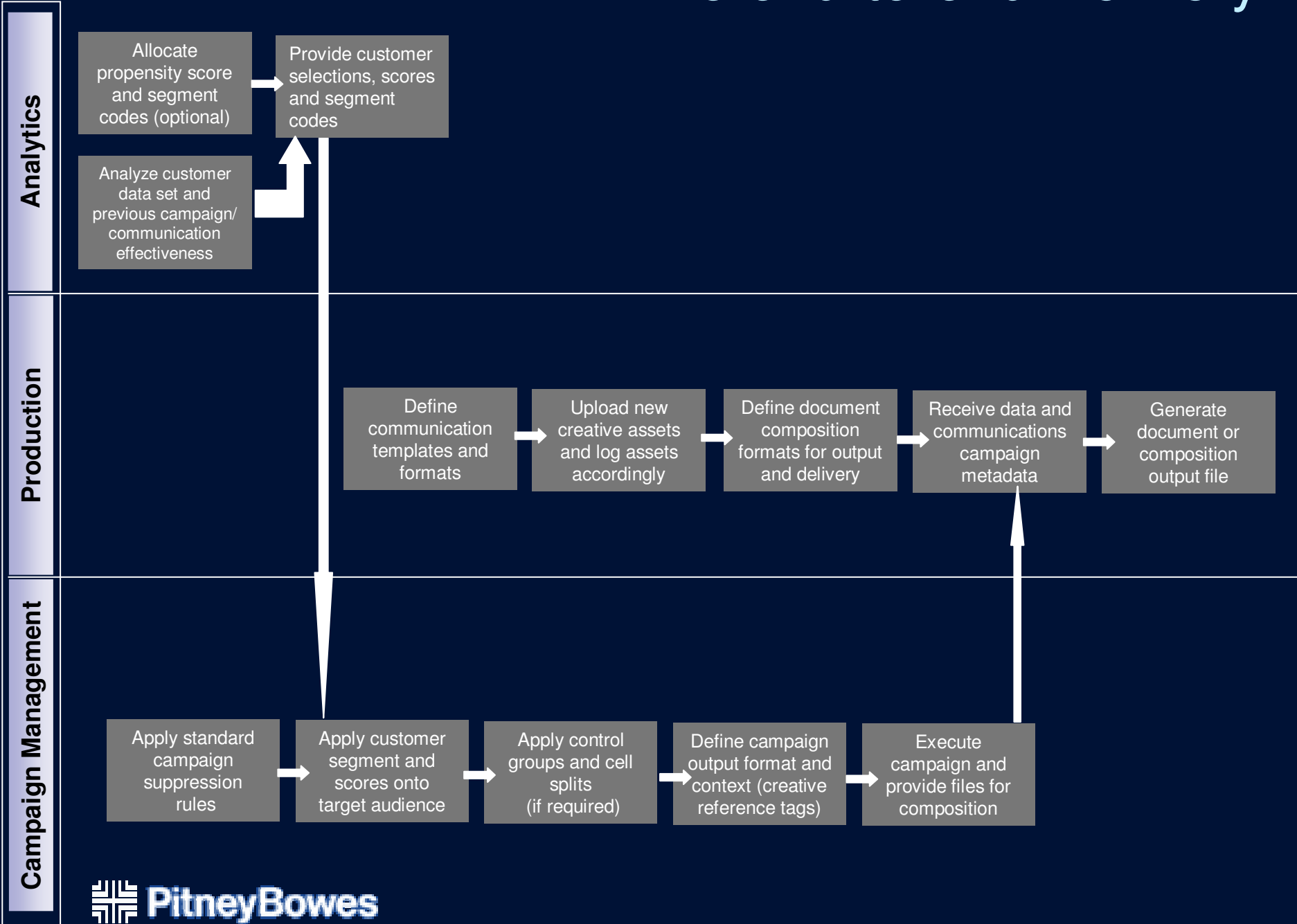
- Understand your customers
- Identify behaviour patterns
- Evaluate communication performance
- Understand the most appropriate and relevant channel

- Define campaign budgets
- Understand available channel volumes
- Define the campaign logic
- Confirm the business rules
- Understand campaign schedule

- Build customer segments and propensity scores
- Construct campaign selection rules and output formats
- Develop channels and templates
- Confirm the trigger and campaign timings

- Merge assets into templates
- Pull in data selections
- Construct document composition
- Send to print provider, (email services provider, telemarketing house or SMSC)

# The *end-to-end* Delivery



# Transform to Customer Engagement

## A profit-building engine

- No more “one-size-fits-all”
- Faster decisions – less approvals
- Increase upsell acceptance
- Improve overall customer satisfaction and experience
- Boost customer loyalty
- Improve retention
- Information is an asset not easily replicated by competition

Tactics fail without Strategy...

Questions?