



# BUYER'S GUIDE

CLOUD CENTRIC<sup>o</sup> CUSTOMER FOCUSED<sup>o</sup> ENGAGEMENT PLATFORM<sup>o</sup>

# CUSTOMER COMMUNICATION MANAGEMENT

## 10-Point Checklist



### Areas of Impact:

- 1: Customer - Facing Communications
- 2: Customer Profile Management
- 3: Multi-Channel Delivery
- 4: Integrated Campaign Management
- 5: Marketing & Operational Message Orchestration
- 6: One View Interaction & Engagement Analytics
- 7: Marketing Automation & Lead Generation
- 8: Customer Lifecycle & Experience Management
- 9: OMNI Commerce & Payment Initiatives
- 10: Voice of Customer Feedback & Survey Execution

### Cloud Centric° Customer Focused° Engagement Platform°

366° Degrees<sup>SM</sup> by OMI is a cloud-based multi-channel marketing and customer communications management platform that drives deeper customer engagement through email, text, social media, mobile and customer facing portals.

Organizations benefit from a cloud-centric approach to involve branding, engagement and customer experience management into every aspect of your marketing communication strategy. 366° Degrees<sup>SM</sup> boosts your abilities in key areas that drive consumption, adoption, retention, revenue and engagement. The service provides holistic views of all operational and marketing oriented communications being distributed and consumed by customers.

#### 1: CUSTOMER - FACING COMMUNICATIONS

Organizations are investing in advanced technology to automate and improve brand marketing initiatives. These investments often fall short; not because of a lack of functionality, but due to little focus on the overall customer communication lifecycle. 366° Degrees<sup>SM</sup> focuses on improving existing customer communication points that are often transactional or operational in nature -- outbound correspondence associated with account onboarding, enrollment, notices, renewals, bills, policies and statements. Our clients see an immediate return on investment by reworking existing communication processes within the 366° Degrees<sup>SM</sup> service.

#### 2: CUSTOMER PROFILE MANAGEMENT

Customer profiles are a vital component in customer communication management services. Today customer information is spread across multiple systems, and profile data is often incorrect or out of date. 366° Degrees<sup>SM</sup> continuously builds accurate customer profiles by aggregating operational communication correspondence with marketing and campaign related communications, to breathe new life into customer experience initiatives. Your customers manage personal preferences such as email, online, text, print and payment options, through responsive mobile and portal access native within the 366° Degrees<sup>SM</sup> platform.

#### 3: MULTI-CHANNEL DELIVERY

With 366° Degrees<sup>SM</sup>, there is no guessing which communications were sent, opened or interacted with regardless of the delivery channel. Once customer delivery preferences are established, multi-channel execution becomes a reality. Organizations often struggle with message consistency across delivery mediums due to internal and external market supply chains that are not in sync. 366° Degrees<sup>SM</sup> allows for a single source approach to multi-channel message aggregation of outbound marketing and operational communications through the following channels; email, online, text, mobile, social and traditional print and mail mediums.

#### 4: INTEGRATED CAMPAIGN MANAGEMENT

Campaign management across multiple channels is one of the most difficult areas to execute for marketers and brand managers. Multiple constituents from creative, agency, copyright, to internal marketing staff, all impact time-to-market and effect time-to-revenue for new services and products associated with sales execution. The 366° Degrees<sup>SM</sup> quick campaign module allows you to collaborate with other marketing resources to work on marketing assets such as landing pages, emails, social, banners and print messaging components. Campaign managers connect to leading CRM data sources to drive integrated campaigns. Consistent content and context are maintained across all targeted channels. Event-based and interaction-driven workflows can be designed with easy to use campaign workflow assignments. With 366° Degrees<sup>SM</sup>, campaign marketing asset activity is shared across other constituents such as sales, operations and customer support.

*“Two thirds of all organizations utilize third-party service providers in the communication supply chain to deliver mass communications on behalf of the organization, with no visibility to outcomes.”*

#### 5: MARKETING & OPERATIONS MESSAGING ORCHESTRATION

Organizations send billions of boring notices, statements, bills, policies and renewals each year. 366° Degrees<sup>SM</sup>

leverages these routine customer communications by allowing marketers and campaign managers to easily integrate existing campaign content and context into outbound communications including, transactional email notices, text alerts, and print and mail, with no impact to operations. For years, outgoing print communications have been issued with no intelligence to personalize these routine notices. Although software has been available, it has been relegated in the document composition software where marketers have had no access. 366° Degrees<sup>SM</sup> allows marketers to manage the audience selection, content and context, in which messages are included on outbound communications to increase conversion rates and increase revenue.

#### 6: ONE VIEW INTERACTION AND ENGAGEMENT ANALYTICS

The holy grail of customer engagement and experience resides in the ability to have one view of the customer and their relationship with the organization. With the proliferation of different applications that host customer data, customer centric views are of growing importance and require an ideological shift in the way organizations manage customer engagement. Our approach of aggregating outbound and inbound communications allows organizations to view all communications being created, managed or delivered. Customer profiles reveal communication preferences, engagement levels, campaign interactions, social engagement, feedback responses and other services interactions. All customer activities, responses, interactions and engagements are available in a fully customized business intelligence and analytics

area. Organizations can quickly identify revenue opportunities, customer concerns, and determine what content messaging is resonating.



#### 7: MARKETING AUTOMATION LEAD GENERATION

Organizations are rushing to find new ways to target, nurture, and acquire customers. It has become harder to reach new prospects and opportunities. Marketing automation with 366° Degrees<sup>SM</sup> allows organizations to move from a traditional high cost effort to a more nurture oriented sell. Through the 366° Degrees<sup>SM</sup> app and marketplace, we have partnered with the leading CRM providers to complement existing investments. With our quick campaign module, marketing and campaign managers can create, collaborate, target and deliver multi-channel lead-oriented processes through landing pages, email marketing, social marketing, banners and traditional print centric channels. Organizations can simplify reporting on lead & campaign activity across CRM data sources or natively within 366° Degrees<sup>SM</sup>.

*“Utilizing operational & transactional communications such as notices, emails, and printed bills as marketing conduits, creates a 25-30% higher conversion rates for campaigns vs any other marketing channel.”*

## 8: CUSTOMER LIFECYCLE & EXPERIENCE MANAGEMENT

Best-in-class organizations understand where customers are in the different phases of a lifecycle; from demand generation, account onboarding, enrollment, purchase, retention, cross sell, and revenue and growth opportunity phases. Best-in-class organizations systematically tailor communications to improve customer experiences and grow brand loyalty across the customer journey. To reach this classification requires huge capital investments in people, process and technology. 366° Degrees<sup>SM</sup> plays a primary role in providing key measurements through interactions and engagement across phases of a customer lifecycle that touch outbound and inbound communications. We have created a customer scoring methodology called (CAR<sup>2</sup>E) that spans the consumption, adoption, retention, new revenue and engagement phases, that organizations must measure to reach a best in class status. This scoring process is built around measurement of key indicators that drive effective communications. We work diligently with our clients using the CAR<sup>2</sup>E model to drive brand loyalty and provide better experiences across the customer lifecycle.

## 9: OMNI COMMERCE & PAYMENT INITIATIVES

With the emergence of mobile bill pay, electronic wallets and payment portals, organizations need assistance in providing commerce payment alternatives to customers. 366° Degrees<sup>SM</sup> facilitates

and delivers communications that drive payment engagement. Our payment provider marketplace includes leading payment gateways, payment processors and new emerging technologies. A 366° Degrees<sup>SM</sup> customer-facing portal can facilitate the process from payment notifications, reminders, presentment and payment, to replace outdated facing portals or complement existing processes with new payment channels that effect cash flow. Our payment provider network is second to none. We integrate any payment channel to your existing processes.

## 10: VOICE OF CUSTOMER FEEDBACK AND SURVEY EXECUTION

366° Degrees<sup>SM</sup> provides a built in feedback service to measure customer sentiment associated with targeted questions, ideas, problems or praise. Campaign managers can target feedback that is directed to specific customer types, account types, new onboard clients or any other criteria defined in the audience selection area within 366° Degrees<sup>SM</sup>. It's easy to create dashboards to track feedback and other important information communicated by your customers. Create a full service survey solution that uses interactive voice response, web forms, and printed surveys for larger audience segmentation for any channel. The 366° Degrees<sup>SM</sup> partner marketplace provides all aspects of a multi-channel survey and response management offering, for sophisticated voice of customer programs.