

# THE APEX GUIDE TO CUSTOMER COMMUNICATIONS SHOPPING

75 crucial questions to ask  
when evaluating customer  
communications solutions



# INTRODUCTION

Every enterprise in the world is—or should be—amidst transformation. In a post-pandemic age, exceptional customer experience is the number one differentiator for businesses.

Today's customers are savvy and more demanding than ever before. The lowest price no longer earns loyalty. Their entire journey with you must be seamless, aligned to their interests and preferences at every touchpoint. Despite being more—or even completely—digital, the customer journey needs to be highly personalized.

## **The race to orchestrate the greatest customer experience (CX) is on.**

So, how do you get race-ready and position yourself to win? Implement the most intelligent customer communications management (CCM), customer experience management (CXM) solutions and processes that will accommodate your unique needs.

Overhauling your customer communications to be more customer-centric and investing in solutions to transform customer experience to gain a competitive edge is no small feat. You'll likely spend the better part of a year researching,

line-iteming, securing budget and creating metrics. You'll also spend significant time comparing vendors and watching solution demos to learn which solution is best.

But there is a crucial thing that you need to know from the outset: demos and fine print don't always tell the whole truth. Unless you have a colleague in the CCM business or have been through the wringer with a different vendor, there are success-determining questions you don't know to ask. (Often these questions are not triggered in the sales process by design because the answers are unfavorable to many vendors.)

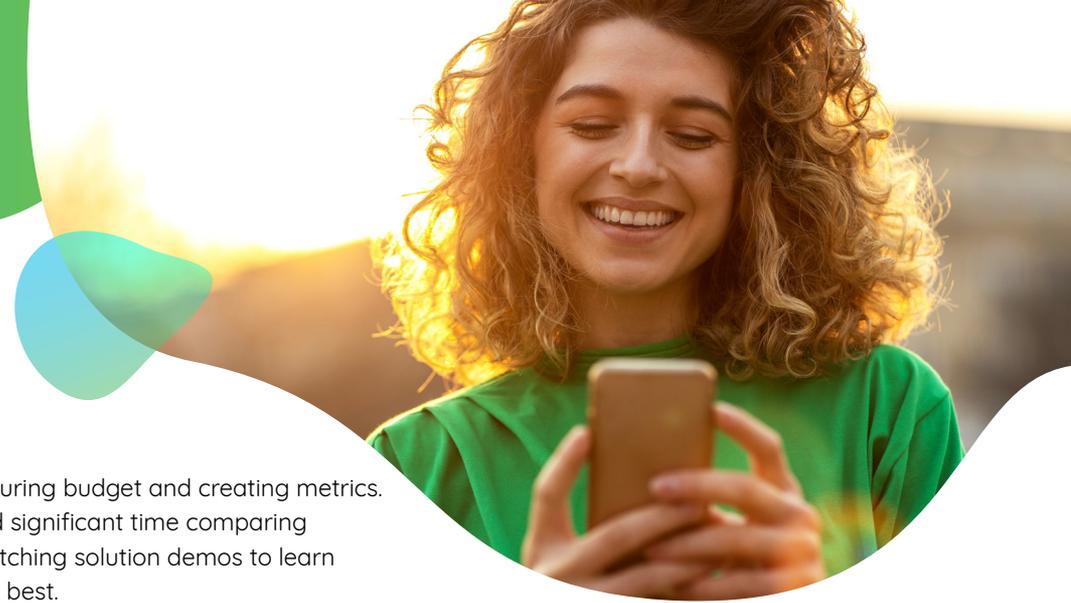
You won't learn that your detailed budget might be held hostage to obscure terms and conditions that maybe show up after you've eliminated a vendor or two. You also won't learn that you might have little control to prevent or plan for budget overages as you empower your users with the UX controls you need to enhance CX. You probably won't get insight into customer enablement and success measures (or lack thereof) that the vendor leverages for your project's success. Or know how

their company history, stability and longevity can really impact your CCM success. And if you don't know these things, you might have to explain some big oversights leading to poor metrics and budget overages.

Regardless of if you ultimately end up a happy Quadient customer, we want to empower you to make the absolute best choice when it comes to CCM and CXM tools. (Full disclosure, it probably is us...).

To help you get started, we're sharing the Apex Guide to Customer Communications Shopping. From budget to customer success, rendering engine capacity to scalability, you'll find questions crafted by CCM experts that can help you make the most informed, intelligent solution purchase.

Let's dive in.



## BUDGET

Chapter 1—Billing & upcharges .....	4
Chapter 2—Reporting & budget projections .....	5

## CUSTOMER SUCCESS

Chapter 3—Customer success & enablement .....	7
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## CAPABILITIES

Chapter 4—AI-based template migration .....	10
Chapter 5—End-to-end process, efficiency and experience.....	12
Chapter 6—Customer experience management (CXM).....	15
Chapter 7—Customer journey management .....	16
Chapter 8—Mobile design & omnichannel orchestration decisioning ..	19
Chapter 9—The power of any-premise CCM .....	21



# BILLING & UPCHARGES

Will your —or existing—CCM platform allow you to scale communications projects effectively to deliver on your organization's customer experience vision? The success of your CCM initiatives, and the recognition you could earn in the company, depend on it. But it's quite possible that your efforts could suffer death by a thousand budget hits. Ask these billing-related questions to avoid that.

## UNIT OF BILLING

### 1. What is the unit of billing?

Is the solution price based on the communication, number of users, the number of pages, or some quantity of data as a metric?

**!** **This matters because** if output billing is based on kilobytes of file size, this price will fluctuate unpredictably across communication types and could exhaust your budget quickly.



## UPCHARGES

### 1. Are new features chargeable?

**FOLLOW UP:** *If so, please explain.*

### 2. What is the maximum size of a communication before triggering overage fees?

**FOLLOW UP:** *Please explain file upcharge scenarios.*

**!** **Why does this matter?** If you aren't fully informed of the billing policies, you could drain your budget in just months and accrue unpredicted upcharges for the remainder of your contract. As an example, the file size may increase because the marketing team adds more imagery, or because the number of communications doubles, or additional text is added for compliance. There are many scenarios in which file size can be altered when your teams have no idea. You need to find out if you will take any—or all—budget hits on this.

### 3. We are a global enterprise, in what languages is your interface configurable?

**FOLLOW UP:** *How many languages are included in my allotment?*

### 4. Are entitlements governed by output channels (print versus web versus SMS, etc.)?

Is there any upcharge or additional costs for communications that are larger than average? If so, who defines average?

**!** **Why is this important?** A simple file or high-res image added to a communication can bloat the volume of inefficiently rendered images, which in turn bloats your bill.

# REPORTING & BUDGET PROJECTIONS

We spend a ton of precious time justifying our budgets. Like the billing-related questions that are buried in fine print and T&Cs, these reporting and budget-related questions will help keep your projections aligned to your investment.

## REPORTING

### 1. What real-time status and monthly billing reporting does your solution provide?

**FOLLOW UP:** *What dashboards or reports are available to clearly track my remaining volume entitlements, users, etc.?*

- !** **Why does this matter?** Budgets are hard-won; they are painstaking and precise and must be justified at every line. Getting blindsided by upcharges is preventable. Consistent reporting on allotment usage enables you to adjust processes and implement trainings to prevent the need to secure supplementary budget. Vendors have different reporting structures, find one that best allows you to control your investment.



# BUDGET PROJECTIONS

1. **What is the file size allotted for a “normal” communication?**
2. **What multipliers affect billing? Do you charge for batch, on-demand and two-way communications capabilities separately?**

**FOLLOW UP:** *Exactly how do you charge for:*

- *Designing interactive content?*
- *Opening interactive communications?*
- *Previewing communications?*
- *Interactive communication editing?*
- *Delivering communications?*
- *Delivering via email with attachment?*

**!** **Why does this matter?** Some vendors have multipliers that charge you for the same communication multiple times if the rendering engine is incapable of generating multiple outputs efficiently. For example, a customer calls for a mortgage quote, which a rep initiates, but the call does not result in additional communication because the caller hangs up—you may or may not be charged depending on the pricing structure.

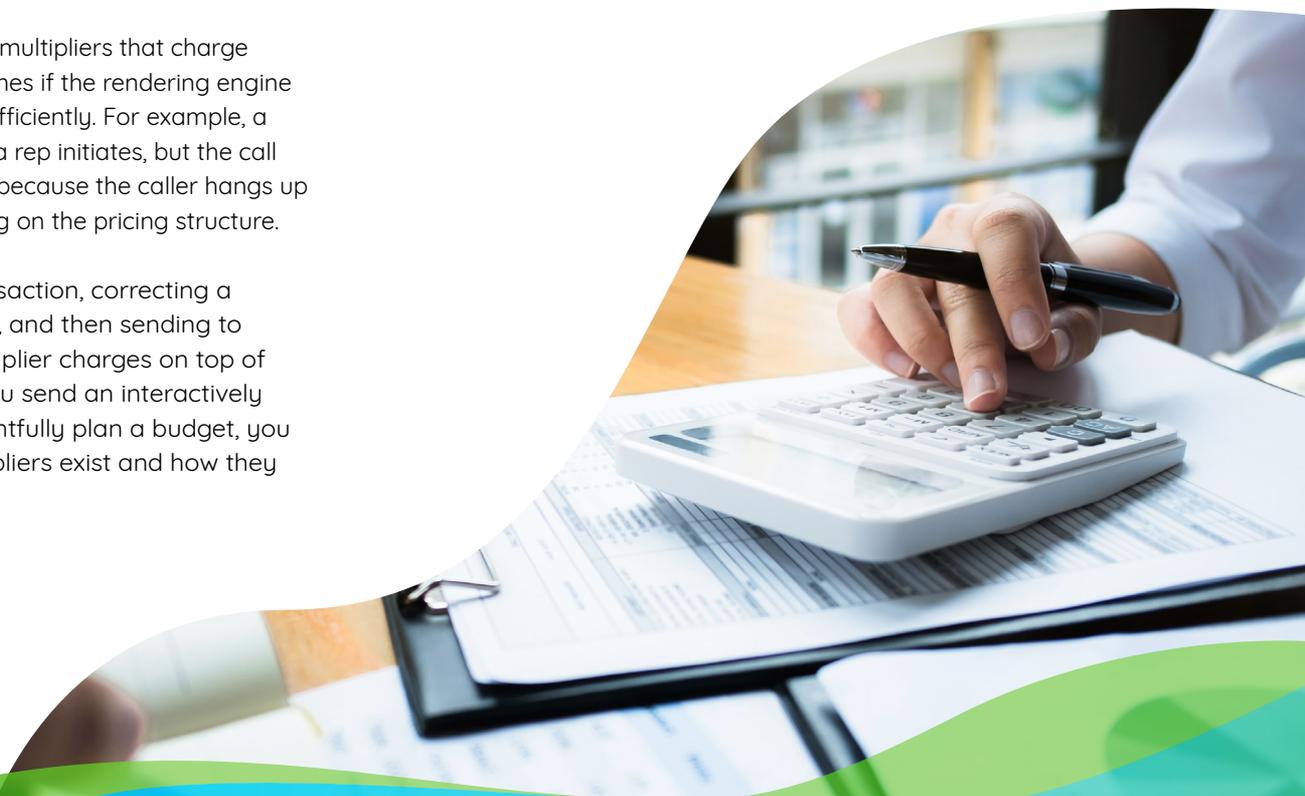
Here’s another example. Previewing a transaction, correcting a mistake, re-previewing the communication, and then sending to the customer can result in duplicative multiplier charges on top of the base communication charged when you send an interactively generated contract for approval. To thoughtfully plan a budget, you need to be informed of exactly what multipliers exist and how they can add up during expected business use.

3. **What percentage of customers exceed their budget for their SMS, PDF, email, and print output projects in a year?**

**!** **Why does this matter?** History tends to repeat itself. If existing customers typically exceed their budgets with a vendor annually, you can expect to as well.

4. **In the event of overages, I would like adequate notice to align my budget—how does your organization inform customers if they approach or exceed budgets and with what lead time?**

**FOLLOW UP:** *How do you communicate draw down status on entitlements within your platform? Please explain how users or managers know their performance against budget.*



# CUSTOMER SUCCESS

There are myriad solutions that can handle your easier customer communications applications. In fact, many can pass your RFP process with flying colors. But, after committing, you may realize limitations in capabilities, performance or cost. Choosing a vendor is the start of a 5-to-15-year relationship and holistic customer experience is directly correlated with successful implementations.

That means you must explore customer happiness – through customer satisfaction ratings, reviews and customer success offerings—before you become a customer. If you are in the race to customer-first transformation, it can come as a surprise that some CCM and CXM vendors promising to help you achieve this may not put their customer’s success first.



“WITH THE HIGHEST NET PROMOTER SCORE ON THE ASPIRE LEADERBOARD FOR THE THIRD YEAR IN A ROW AND ITS STRONG FOCUS ON OMNI-CHANNEL ORCHESTRATION AND DIGITAL COMMUNICATIONS, WE SEE QUADIENT WELL-POSITIONED FOR SUCCESS AS IT BUILDS OUT ITS SAAS PLATFORM.”

- Kaspar Roos, Founder and CEO of Aspire

HERE ARE THE QUESTIONS TO ASK TO GET MORE INSIGHTS INTO YOUR CUSTOMER EXPERIENCE AND IF IT SETS YOU UP FOR LONG-TERM SUCCESS.

1. Explain how customer satisfaction scores impact your future developments?

2. What are the all-time numbers for a customer's propensity to recommend your solution?

**FOLLOW UP:** *What included support services do you offer to customers?*

**!** **Why does this matter?** This question will answer whether the vendor is invested in your success. The depth of customer support and professional services capabilities are leading factors in determining Net Promoter Scores for CCM vendors, as the ability to guide a customer through to their first successful project is crucial to demonstrating ROI and CCM capabilities.

3. Please explain how your all-time customer scores compared to the past 12-month period.

**FOLLOW UP:** *Please share customer review data from an independent third-party source.*

4. Describe how your CX innovations improve the day-to-day work of your customers?

5. How do you contribute to your community of customers?

6. How do you help your clients understand and make use of technology upgrades and new solution offerings?

7. How large is the community of CCM users in your ecosystem and how to they interact?

## FUN FACT:

Quadient's track record for customer success is consistently validated by analysts and customers alike. Our enablement tools position you to outperform your competition. Our customer success numbers (97 %) have been the highest in the market for three straight years because we are invested in your long-term success. Our customers agree; we have the highest third-party validations and the highest NPS scores in the industry.

### Quadient Inspire Ratings Overview

Review weighting ⓘ  Reviewed in Last 12 Months  EMAIL PAGE

4.7 ★★★★★ 88 Reviews (All Time)

97% Would Recommend

#### Rating Distribution



#### Customer Experience



2 Star  
1 Star

5.0 ★★★★★ July 27, 2021

Distribution

#### Stellar product made better by top of line support

Their product is top notch (we evaluated many different communication preference solutions) and their professional services team has been phenomenal. They've helped us every step of the way with clear direction, enthusiasm and support. We have had the pleasure of working with two excellent ...

[Read Full Review](#)



## INTELLECTUAL PROPERTY

Enterprise-level customer communications management takes an immense amount of resources, from financial investment to person hours. You don't want all that work to be done only to find out that your workflows, templates, content, and designs must stay with the vendor. Past work and intellectual property should be yours to keep.

**1. I want to back up my communications portfolio locally, or elsewhere, how do I do this with your organizations' technology?**

**FOLLOW UP:** *Where will my communications Intellectual Property live?*

In the six years Quadient has been developing journey mapping technology, we learned a lot about the discipline of customer-first thinking. As we developed technology to make it easier to manage journeys, we put a large investment into improving our own clients' journeys.

Our clients need to quickly adapt to technological shifts, so we created Quadient University, The Quad, and Quadient Exchange - an extensive library of resources. This makes it easy for our users to learn from videos, test environments, example code, articles, benchmark data, and short courses. We learned a lot about CX while developing the first version which has translated into better service and enablement for our customers. We are ecstatic that Quadient earned the highest score of 90 in this critical customer-first category in the 2021 Aspire Leaderboard for CCM.

# AI-BASED TEMPLATE MIGRATION

AI template migration—the process of transferring your existing data and documents into your CCM ether—directly impacts your ability to leverage your most powerful asset: data. If your CCM lacks strong AI template migration capabilities, you cannot truly achieve omnichannel, customer-first, digital transformation.

This is particularly true for legacy enterprises. Because AI-based template migration optimizes old content and quickly migrates to new environments, it can drastically decrease the time spent analyzing legacy templates.

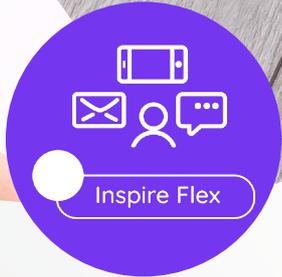
That is significant because **enterprises typically spend more than one year analyzing documents**. If your goal is to update templates, improve design and add new digital channels on a competitive timeline—AI-based template migration capabilities matter to you.

## EXPERT INSIGHT:

When combined, AI-based template migration, data management and integration are a powerful accelerant for digital transformation projects letting you implement months, even years, sooner.

Asking these questions will help you learn if your vendor can meet these critical needs.

1. My team has put off migration for several years because it takes too long to define our project before writing our RFP. How can you help our team validate and improve on this work?
2. How do you ensure that all my existing content is successfully migrated to the new CCM system?
3. We understand that AI, ML and NLP technologies assist in migrations, but how do we ensure that we have the best solution for us going forward? What are your strengths in these technologies? What weakness or limitations do you have?
4. If a communication requires data from multiple systems, what preprocessing is required before I can send data to the CCM solution?
5. Can I send multiple files? Can these files be in different formats? Can I mix database queries, flat files and third-party API calls in a single job your applications?



## How Quadient prepares you for the great CX race

Quadient’s **InspireXpress** technology earned the highest capability placement in the AI template migration use case. InspireXpress applies artificial intelligence, machine learning, and natural language processing technologies to deconstruct legacy documents at scale. This transforms your old communications into new content and templates which form the building blocks of a true omnichannel CCM portfolio. In fact, customers have saved 90% of their pre-project analysis time while reducing their post-implementation content management effort by 60% after content optimization.

Quadient’s **Inspire Flex** supports a wide variety of input files, databases and data services. The technology also supports transformations, concatenation, reformatting, sorting, and other data manipulation features within the CCM environment. This means you don’t have to rely on other teams to process data before you can start. Inspire accepts data in an “as is where is” state, unlike other offerings that may require extensive processing to generate a single XML file before the communication design can start. With hundreds of billions of communications needing annual processing for billing, cross charges and other inter-departmental processing needs, data integration is a critical capability that Quadient offers. Inspire Flex makes it easy to integrate data from many places, in many forms, and to write data to myriad places and formats without custom coding.

# END-TO-END PROCESS, EFFICIENCY AND EXPERIENCE

Speed and power are not synonymous when it comes to CCM technology. Nor is “scalability” and power. Most organizations believe that smart CCM solutions offer predictive modeling, document automation or digital experiences that render data and make faster decisions. Great capabilities, yes. Speed, yes—technically it could be there. But what you need to know is, **“is this engine built to combine these capabilities efficiently to maintain speed and scalability?”**

Regardless how scalable it claims to be, a solution built via a hodgepodge network of outsourced integrations—data work, rendering engines, and so on - lacks efficiency. The result is slow speeds, poor performance, and unpredictable costs. Often, one complex project deployed on an outsourced engine can blow your annual budget. Sometimes, if a CCM vendor demos a simple communication for you—hiding their inability to handle complexity, you realize too late that the engine is not capable of completing the project and you’re left scrambling for a backup to avoid regulatory violations.

An intelligent CCM solution is a network of connected technologies that integrate seamlessly between engine, channels, departments, existing systems, and data to empower your organization to function holistically. **This level of solution sophistication only comes from dedicated R&D teams iterating owned technology from the ground up. No shortcuts,**

**no outsourcing. These are the CCM solutions proven to drive digital transformation and exceptional customer experience most quickly.**

It’s hard to know what exactly is under the hood of solution providers. In all honesty, most vendors don’t really want you to know. Because often you will find a patchwork of outsourced technologies, cleverly hidden in speedy or scalable packaging.



Here's what you need to ask to truly understand how powerful a CCM engine is.

## RENDERING ENGINE + EFFICIENCY CONCERNS

1. **How are clients charged for preview renderings, test renderings and other non-production communications?**
2. **Explain how your underlying CCM engine technology is designed to create efficient communications.**  
  
▶ **Why does this matter:** Communications can be of all levels of complexity, from 100+ character SMS notifications to highly complex insurance policies and graphical wealth management proposals. If your CCM provider is built to provide the easy communications only, it'll struggle when you need power to create the complex ones. The key here is to avoid the 80-20 rule. Traditionally organisations use the "can it do 80%?" rule to decide if it's efficient enough. Beware—if it can only do 80%, that means 1 in every 5 templates will require a completely different solution. That will come with additional cost, and the second solution may have been able to do all the easy comms anyway.
3. **How do you ensure that communications are efficiently designed to use the minimum amount of space on a recipient's devices?**
4. **Do you own your rendering engine or is it third party/outsourced? If it is outsourced, how can I expect predictable billing if you are charged for extra computing power during a complex job?**

## DESIGN CAPABILITIES

1. **Is there a limit on the number of users?**
2. **Does my whole department have access or is access limited?**
3. **What productivity benefits could you create for your customers?**

## FUN FACT:

Quadient Inspire's rendering engine scored a 99 out of 100 in the 2021 Aspire Leaderboard for CCM.

Over three decades, we've tasked the world's largest customer communications-focused R&D team on the planet with building the highest-rated, most innovative rendering engine on the market.

That means faster, more cost-effective communications—even for your most complex jobs. And, that's why thousands of organizations worldwide trust Quadient Inspire to handle their most complex customer communication challenges. With seamless, personalized, and consistent communications across all channels, there's no project too complex for the Quadient Inspire suite. It's intelligently engineered for optimum efficiency.

## APPROVAL CAPABILITIES

1. How do approvals need to work? How many teams need to sign off communications? Does every team need to sign off in sequence, or can you create efficiencies by signing in parallel?
2. Does that sign off vary from product to product?
3. How long does your approvals process take?

## FRONT OFFICE CAPABILITIES

1. Do you have any issues with communications completed incorrectly by your teams?
2. How do you define, measure and audit quality?
3. What is your overall error rate and/or quality metrics?
4. How do you ensure your users are working according to the official process?
5. How do you control high value and high-risk communications to ensure high quality as well?

## COMMUNICATIONS DELIVERY

1. What teams and/or vendors are responsible for email output management?
2. What challenges have others customers had with their vendor/teams?

“ QUADIENT EARNED A SCORE OF 99—THE HIGHEST EVER RECORDED—FOR OUR RENDERING ENGINE EFFICIENCY IN ASPIRE’S 2021 CCM LEADERBOARD.

- Kaspar Roos, Founder and CEO of Aspire

## COMMUNICATIONS TRACKING

1. I want to view a full view of communications performance and interaction. How easy/accurate is it to get metrics on unsubscribes, open rates, etc.?  
*FOLLOW UP: How will I be able to view my SMS metrics?*

## DATA CENTER POWER

1. Where are your data centers located?  
*FOLLOW UP: How and when do you consider expanding data centers to accommodate global enterprise or international customer needs?*

# CUSTOMER EXPERIENCE MANAGEMENT (CXM)

No matter where you are in your CCM adoption, CCM is even more powerful when combined with CX tools like customer journey management and omnichannel orchestration capabilities to enable connection in every critical moment of the customer lifecycle. (By the way, this is what we call CXM—this powerful intersection of CX tools and powerful CCM solutions to drive exceptional customer experience.)

If you are looking for customer-first transformation and a way to get your CX the value recognition it deserves, you need to be looking at solutions that integrate journey management with customer communications management.

With our industry-leading Inspire Journey and Inspire Flex solutions, and our SaaS-based Inspire Evolve offering, Quadiant is the only true CXM vendor on the market. In fact, we lead in journey visualization, mapping, orchestration, and management capabilities in addition to CCM.

Here are some questions designed to help you learn what, if any, tools a vendor has to help you make a true impact by connecting customer journeys with customer communications.



- 1. How do your users collaborate with other stakeholders or lines of business who may be working on different communications in other stages of the customer journey?**
- 2. How do your clients attribute performance and value to their communication projects using KPIs and other relevant metrics?**
- 3. How do your clients know to improve a communication that is performing poorly in relation to your brand's customer experience standards?**
- 4. I am looking to take my communications to the next level with CX tools like customer journey management. If you do not offer a customer journey solution, how efficiently does your solution integrate with and communicate to other CX technologies such as customer journey management solutions?**

# CUSTOMER JOURNEY MANAGEMENT

Gone are the days when one-size-fits-all customer journeys drive value. CX-obsessed companies have raised the standard. Every interaction a customer has with your organization is an opportunity to delight or disappoint. To compete today, enterprises must meet the new threshold of empathetic, hyper-personal, omnichannel experiences. To achieve this, companies must engineer human-centric experiences within the context of every individual's unique journey.

But analysts like Omdia, Gartner, Aspire, and Forrester agree that most businesses are at risk of failure to deliver on these expectations. Enterprises must go beyond mission statements and achieve true cultural transformation. **It takes more than customer journey mapping—it takes customer journey management.**



WITH THE LATEST DEVELOPMENT IN ITS CUSTOMER JOURNEY MAPPING AS WELL AS ITS INTEGRATIONS WITH COMPANIES LIKE KITEWHEEL, QUADIENT HAS TAKEN JOURNEY ORCHESTRATION TO A NEW LEVEL. NOT ONLY DOES IT OFFER DESIGN-THINKING COLLABORATION THAT IMPROVES EXPERIENCE PLANNING, WHICH IS A UNIQUE CAPABILITY IN THE CCM SPACE, IT NOW ALSO HAS NEXT-BEST-ACTION AUTOMATION CAPABILITIES TO ORCHESTRATE TRUE OMNICHANNEL COMMUNICATIONS AT SCALE. - KASPAR ROOS, ASPIRE

# THE POWER OF JOURNEY MANAGEMENT

Sophisticated journey management solutions go far beyond customer journey mapping to leverage the power of visualization with data analysis for deep personalization, the ability to prioritize the most impactful real-time improvement opportunities for an exceptional experience.

As you know from your customer preference stats, your customers are adding complexity to your processes as their collection of devices, accounts and channels grow. Today's communications leaders approach content design from a process completion perspective, understanding that it often takes several interactions across multiple channels to complete a process. Your prospects may need a nudge to finish an application process. Maybe you've landed in their spam folder and need to try an alternate channel. Perhaps you need to send a reminder to activate a languishing approval. Maybe a customer already has your app, and you need to send them a push notification to complete a regulatory process.

Here's the power of journey management: it can inform you on what, when and how content should be delivered to your customer and orchestrate the next best actions—even on digital channels. Using one technology, it brings design and delivery teams together in one platform that allows them to understand and adapt to each customer's changing context and channel mix.

Journey management tools should successfully empower CX advocates with a deep, enterprise-



## Features to look for in customer journey tools

- **Intuitive mapping**
- **Global map linking**
- **Dynamic living dashboards**
- **Interactive, design-thinking mapping tools**
- **Remote collaboration and orchestration tools**
- **Data integration**
- **Dynamic tracking of KPI and emotional scores**
- **Next-best-action design and delivery**
- **Friendly CCM and omnichannel integration**
- **Export capabilities**
- **One, centralized platform**



wide understanding of business impacts tied to each customer interaction along their lifecycle and orchestrate the exceptional experiences that jump-start your path to total CX transformation. They should let you visualize a journey through the customer lens, delivering powerful insights via dynamic digital maps. They should also leverage data, adding science and emotional scoring for deep, factual personalization. They should also use AI for the prioritization of tasks and projects that truly impact, enhancing the customer experience at every touchpoint. And they should orchestrate next best actions, letting you make rapid changes to communications, regardless of channel. When integrated with omnichannel CCM and best-in-class design capabilities, this technology makes for a transformative customer experience that drives value across each lifecycle.

Here are customer journey management questions to include in your RFP as you evaluate vendors.

1. **How does your journey solution ensure that communications are designed to orchestrate the next best action for completing a business process (onboarding, signup, renewal)?**
2. **How does your journey solution ensure that my communications are compliant with the CX standards of my organization?**
3. **If a customer stops responding during a customer journey, how does your solution help re-engage the customer to increase the chance of action or completion?**
4. **How does your user interface help stakeholders from multiple teams keep track of communications as they change channels and advance a customer journey?**
5. **What type of metrics does your journey solution offer?**
6. **Does your solution offer an integrated service that allows for visualization, analysis and orchestration of next best actions?**

So, you've orchestrated the journey, identified the right content based on the customer's context. What happens next? You need to ensure the communication actually gets to the customer. We're covering that next.

# MOBILE DESIGN & OMNICHANNEL ORCHESTRATION DECISIONING

Visualizing a comprehensive customer journey helps you truly understand their needs, but how far does that take you? Each communication your organization sends has a specific business purpose. To curate a truly seamless, unique and exceptional experience you need to ensure that each interaction along the customer journey is capable of being designed and delivered.

Efficient design and robust orchestration capabilities can make or break strategic execution. After all, what good is all the work you've put into journey mapping if your communications aren't designed efficiently or even delivered?

It's a common pitfall to think of CCM as one area and digital as another. But, digital (and mobile) are communication channels too—a vital component of modern CCM. Enterprises that incorporate robust mobile and digital capabilities into their customer communications efforts—handling them as they handle other channels—earn a massive advantage.

They do this by looking for technologies that bring the departments together, letting you design content once and confidently leverage it across all channels.

When mobile design is treated as an independent design environment within a CCM solution, **the starting point is an entirely separate set of designs, integrations, approvals, and deployments on at least four—possibly even 10—channels.** This redundancy increases cost, coordination, and complexity while increasing the chances for inconsistency, and non-engagement, across communication channels. Inspire Flex brings digital and mobile together, streamlining the process.

Failover orchestration is the part of omnichannel communications orchestration that ensures handoffs between steps in a communication process or between channels in a single communication in the event of a failover. Essentially, if one channel fails, orchestration & decisioning capabilities automatically attempt connection on an alternate channel. Here's what to ask:

- 1. How do you collect and compare performance statistics for communications that are delivered to a variety of channels to help tune delivery for best results?**
- 2. How does your solution ensure that communications are delivered to a client if individual communications bounce, are unread, or are otherwise not delivered?**

Omnichannel design and delivery capabilities mean that you can design delivery completion into the process, without managing separate "per channel" implementations that add cost, time, and complexity to your communication strategy. Here's what to ask:

- 1. How many screens are required to proof, preview, and compare communications that appear in multiple channels?**



- 2. How many teams need to be involved in the sign-off of communications?**  
**FOLLOW UP:** *Can you preview them simultaneously?*
- 3. Why is this important? Often, many teams are required to sign off on communications per channel slowing the process and frustrating employees and customers alike.**
- 4. When a customer switches channels, how does your solution adapt to the customer's new device?**
- 5. How many interfaces are needed to design a communication that can be delivered for any or all of the following channels: SMS, WhatsApp, email, web portal, push notification, rich push notification, mobile phone (portrait and landscape,) tablet and print?**
- 6. Describe how you create coordinated designs for communications that represent a part of a larger process across a variety of channels.**

# THE POWER OF ANY-PREMISE CCM

When it comes to enterprise CCM deployments, we know that a ‘one-size-fits-all’ approach is not pragmatic. We know that every organization has unique needs and that digital transformation is a spectrum.

Some organizations are just beginning their customer communication transformation journey, while others are further along. Some organizations have more straightforward communication requirements, while others are challenged with more sophisticated use cases (think high volumes, multiple pages, tables, charts etc). You don’t always know what you need until you realize that you don’t have it. As with any major investment, with CCM procurement buyer’s remorse is dreadfully common.

You might not have heard the term any-premise (aka any-prem) before. That changes now.

**Any-prem’s power is that it is uniquely designed to handle ANY project thrown at it; it enables growth at every stage, letting you scale up or down to meet your changing needs.**

At Quadient, we are proud to have built the only any-premise CCM solution suite on the planet. Deployable on-premise, in the private cloud as a hybrid or as a hosted managed service—or even if you are looking for a SaaS solution—it’s designed to solve your customer communications needs now with unmatched flexibility, portability, speed, and scalability at every stage of your growth—no matter where the road takes you.





Here's what you need to ask to learn more about the long-term viability of your CCM investment.

- 1. How many of your customers are fully deployed in the cloud?**  
**FOLLOW UP:** *If considering a SaaS solution: How many are fully deployed in your cloud, vs. using their own cloud.*
- 2. Can you point to specific examples of complex, high-volume projects successfully executed with your SaaS offering?**
- 3. What is the average complexity of a use case that your SaaS can handle?**
- 4. If I find that my communications projects are too complex for the cloud, can I switch to an on-premise deployment?**  
**FOLLOW UP:** *Is there a cost to this?*
- 5. Do you own your on-premise engine or is it outsourced?**
- 6. Do you offer support services for navigating an on-premise engine?**

## If you need...

- SAAS
- SIMPLE
- ON DEMAND
- BATCH
- HIGH PERFORMANCE

## Then you need...



Inspire Evolve

CLOUD NATIVE (INSPIRE EVOLVE)

## If you need...

- COMPLEX COMMUNICATIONS
- DYNAMIC COMMUNICATIONS
- HIGH VOLUMES
- HIGH DATA SECURITY
- SCALABILITY
- FLEXIBLE DEPLOYMENT ENVIRONMENTS

## Then you need...



Inspire Flex

FLEXIBLE (INSPIRE FLEX)

There you have it—any CCM vendor should be able to easily answer these questions early on in your evaluation process. And, even if you have an existing vendor, you should ask these questions before your next renewal.

Today's customers are as savvy as they are demanding. They expect sophisticated, polished and highly personalized customer communications in the moment that they need them. If you fail to provide the customer experience they want, they will go elsewhere (even if that means paying more.)

The fact is that CCM projects aren't simple, but a lot of CCM solutions aren't built for complexity. Fragmented content platforms, legacy systems, departmental silos, and increasingly distributed workforces all create complexity that can be hard for CCM solutions lacking intentional, intelligent design.

Chances are your enterprise is not an exception and you need to create and distribute compliant, personalized, two-way digital communications

in real time across more channels than ever. To meet these communication needs, you need a powerful, connected, end-to-end solution intelligently built with enough horsepower to get the job done.

We've built the world's only any prem CCM engine with deployments available as-a-service, on-premise, in the cloud, or a hybrid. So, your organization can be prepared the most important race of all – connecting with customers anywhere, any time and driving value.

We hope this guide helps you determine the most intelligent approach to customer experience initiatives capable of driving value by enhancing your CX. Our CXM experts are ready get your questions answered.

Connect with us today to gear up for the great CX race.

[quadient.com/experience](http://quadient.com/experience)



## About Quadient®

Quadient is the driving force behind the world's most meaningful customer experiences. By focusing on Intelligent Communication Automation, Parcel Locker Solutions and Mail-Related Solutions, Quadient helps hundreds of thousands of customers worldwide simplify the connection between people and what matters. For more information about Quadient, visit [quadient.com](http://quadient.com).