

First Step Assessment Guide

Your journey to consistent, integrated, effective customer communications starts with this step. Use the questions below to better understand your current state and what comes next. If you'd like assistance as you work through this guide, please reach out. We've been down this path and can make your customer communications journey a success.

Customer Communications Discovery Questions

- What departments send customer communications in your organization and what does each send?
 - Marketing, Customer service, Finance, Legal, Operations, Other
- What formats are used in your current output and multimedia streams? Such as paper, mail, email, text, phone calls.
- Work back from your customer touch points and walk through high-level process mapping for each. Can you follow each process to its origin? How do you handle exceptions in each process?
- Where are any manual and paper-based steps? How much time do they take?
- What third-party services, systems and tools are involved?
- Do you outsource any of your customer communications work, such as design, production, printing or distribution?
- What tools are in place to measure the effectiveness of your communications? What feedback do you receive from customers about your communications?
- About your digital maturity level: Have you started your digital migration? Are your communications still paper only? Hybrid paper-digital communications environment?
- How does your communications strategy tie in with your organization's overall business objectives?
- Do you have additional goals for your customer communications such as cross-selling, retention and acquisition?
- How important is customer experience in your organization? How do you measure and improve it as it relates to customer communications?

There's a lot to think about. Let us share our knowledge and experience to help you figure out the best route to communications excellence for your organization.

