

Capturing the Complete Customer Experience



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CAPTURING THE COMPLETE CUSTOMER EXPERIENCE

Many organizations view customer communications as a critical part of their customer experience (CX) strategy—and forms-based processes are one of the primary ways they “communicate” with their customers. In spite of this, customer communications management (CCM) practitioners have not successfully partnered with their business forms peers to incorporate forms into an overall CX strategy. This creates an increasingly noticeable gap between their digitally transformed omnichannel CCM experiences and their legacy-style form processes that surround them. This makes any ground gained via CCM innovation irrelevant in the overarching experience for the customer.

Organizations have hundreds or thousands of forms that collect information and drive internal and external business processes forward. The complexity and repetitive nature of what exists today results in customer frustration simply because of how much time and effort it takes. Customers can't view forms properly on their phones and they don't want to have to download an app—and, if a customer steps away, they don't want to have to start over. Yet this is what organizations are delivering.

That's the bad news. The good news is that technology can be used to address these challenges more quickly and easily than many CX and CCM leaders realize.

Business processes are going to change as a result of internal and external factors. Period. As they evolve, those processes will be required to collect more data more securely from more customers. To ensure these are positive experiences, organizations and CX leaders need to redefine what a “form” is. Instead of one-way, static transactions, “forms” should become bi-directional, intelligent, sophisticated interactions that leave a customer feeling wowed—like they do when they order something online and it arrives (correctly) at the door four hours later.

A modern “form” is a digital data collection experience that intelligently guides the user through a process. Just as paper forms include instructions for navigating from one section to the next, a smart form can be designed to handle the navigation automatically based on the information that has been collected and validated. The form will guide the user to the next appropriate field and will not display sections or questions that are not applicable. And last, but certainly not least for IT teams, smart forms can structure data intake and pre-fill fields from existing back-office databases—improving data accuracy, minimizing data cleanup, reducing Not In Good Order (NIGO) costs, and eliminating the rekeying of information into multiple systems.

Since business processes are often interactions between customers and employees, smart forms need to simplify inbound and outbound communications, particularly for complex processes, such as those involving a customer's health or finances. In these situations, forms work well alongside other communication processes,

making the entire process as easy as possible as well as workable on the chosen device of the customer. Whether online or on a mobile device, it is important to be able to utilize the device's features, such as a mobile phone's camera, to attach photos. These processes act more like a conversation between the customer and the organization in which the two parties exchange information by passing the form back and forth. A true smart form uses the data provided to seamlessly route the information; otherwise, the customer is likely to abandon the process and resort to calling customer service increasing the cost of the customer interaction.

Organizations deliver a truly differentiated customer experience when there is integration and alignment between “forms” and CCM strategies, which is why organizations are beginning to view forms as a critical component of a CX strategy. Smart Communications™ recognized this with the development of SmartIQ™, a low-code enterprise forms management solution that lets organizations truly transform and automate data collection processes (aka “forms”). Their recently redesigned SmartIQ builds on technology gained in Smart Communications' acquisition of Intelledox in 2019.

This technology supports an incredible range of use cases, from wealth management onboarding and asset reallocation in financial services to beneficiary management or policy changes in insurance (and just about anything in between)—giving organizations a way to maximize utilization of existing technologies and reduce technical debt. And the crisp, drag-and-drop design tool allows business users to create and manage digital forms without expensive IT programming or maintenance.

SmartIQ automates the sharing of data between front office and back-office systems, a capability that legacy CCM platforms don't have, and does so within a secure environment supporting data validation, audit tracking, and digital signatures. Built-in process automation reduces processing time by submitting the form to the next person in the process based on the information input on the form.

In today's business environment with customers expecting digital access to organizations, SmartIQ supports business processes on multiple digital channels, as well as processes through cross channels. Using the graphical design interface, business users can easily create and preview mobile versions of the forms with full functionality and integration capabilities. The design tools utilize a centralized repository of content elements, such as logos, text blocks and stylesheets—meaning change once and apply across any number of digital forms in a matter of minutes. Centralizing the content ensures organizations deliver a consistent experience when communicating with customers across multiple lines of business.

The SmartIQ solution includes a robust analytics engine capable of providing organizations with detailed analysis on each process. The reports generated by the system enable organizations to identify any bottlenecks or stumbling blocks. The analysis allows organizations to adjust processes for efficiency and to improve the customer experience, unlike traditional document composition tools. The resulting analysis data enables business process owners to understand the impact of small changes and the implications to their business.

Business forms are the entry point for many customer interactions. They are a key means of customer communications and must be incorporated into any organization's CCM strategy. SmartIQ enables organizations to automate business forms and streamline business processes to dramatically improve the customer experience.

APPENDIX A – ABOUT THE AUTHOR

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Richard Huff brings extensive experience managing market and product research with the goal of providing excellent advice on best practices and technology recommendations for printing/mailing operations. He conducted numerous research studies on print-related software, operational efficiency, and market pricing.

Prior to joining Madison Advisors, Richard was a senior analyst with Doculabs, where he was lead analyst for end-user and vendor consulting engagements. Huff also had eight years of experience at Uarco, Inc., a manufacturer of customized business forms and labels.

While at Uarco, Richard was a member of the launch team for Uarco Impressions, one of the first distributed short-run color print operations. Impressions twelve print facilities leveraged high speed network communications to distribute and print personalized documents at the facility closest to the recipient.

Richard earned a B.S., Mechanical Engineering, University of Illinois at Champaign-Urbana.

APPENDIX B – ABOUT MADISON ADVISORS

Madison Advisors offers research and consulting services that provide objective analysis, client-specific guidance and in-depth market knowledge to clients in the customer communications management (CCM), electronic delivery and print industries. Madison Advisors' industry-neutral expertise enables enterprise organizations, service providers and technology providers to achieve their strategic objectives around CCM.

Since our inception in 2001, Madison Advisors has helped our clients:

- Assess their competitive industry standing through our Best Practices Assessment
- Develop and implement effective enterprise communication strategies
- Identify growth opportunities in the enterprise, service provider and technology provider markets
- Understand the impact of market trends on their business