

FREE DOWNLOADABLE CHECKLIST:

What to Look for When Evaluating Customer Communications Management (CCM) Software

If your business is ready to embark on the process of digitalizing or upgrading its customer communications management (CCM) system to a cloud-based platform, you'll need to know some pertinent information as you start evaluating vendors.

To help you identify the right vendor partner for your unique needs, we've done the heavy lifting. Our evaluation checklist(s) offers key considerations for individuals involved in the decision-making process. This deeper insight into customer communications management software will help you confidently align the features you need with the benefits you want to achieve.

Capabilities that Support Improved Customer Experience

Feature

Business Impact: What does this mean for you?

- | | |
|--|---|
| <input type="checkbox"/> Multichannel communications (including print formats, pdf, email, SMS, HTML, chatbot, social etc.) | Account for a diverse range of customer preferences without doubling your effort and the number of systems you have/ channels you serve. |
| <input type="checkbox"/> Accessible output | Win and retain business from those who rely on alternate formats or uses assistive technology to accesses communications – roughly 13% of the population.

Create output optimized for customers who might require alternate formats or utilize assistive technology to consume communications. |
| <input type="checkbox"/> Content analysis for understanding tone, sentiment and readability | Conform to regulatory standards around plain language/ reading level and reduce call center costs through optimized, easy to understand content. |
| <input type="checkbox"/> Personalized content driven by incoming data and business logic | Improve straight-through-processing automation without sacrificing the ability to personalize customer communications. |

Capabilities that Support Communication Authors

Feature

Business Impact: What does this mean for you?

<input type="checkbox"/> Business user friendly	Reduce reliance on IT and empower business users and SMEs to be able to make changes easily and intuitively to customer communications and templates.
<input type="checkbox"/> GenAI-augmented communication design	Speed time to draft content, improve readability, translate to different languages, and even make content more/less formal with the support of GenAI.
<input type="checkbox"/> Template design architecture that is independent of channel, language or jurisdiction	Reduce the number of templates to manage. When changes need to be made (such as a logo, new call center number, etc.) they can be applied once and intelligently applied across all templates simultaneously.
<input type="checkbox"/> Browser-based design environment	Improve agility, support remote workers, and reduce ongoing IT maintenance by empowering authors to design from anywhere.
<input type="checkbox"/> Audit trail and commenting/ annotations on template changes	Understand what changes have been made to templates, why, and by who. Associate change logs with systems such as Jira.
<input type="checkbox"/> Transferability of templates across batch (bulk), on-demand, and interactive use cases	Re-use the same template and shared content whether it's for straight-through processing or to be personalized by an agent without having to build different versions.
<input type="checkbox"/> Analysis/regression tools to understand the impact of changes to shared content	Build confidence and reduce risk by ensuring that your communication output hasn't been impacted by changes to data, rules, or logic in the CCM solution.
<input type="checkbox"/> Accelerated migration and consolidation of legacy solutions	Lower overall cost of ownership by speeding migration from legacy solutions and retiring them, or consolidating on an enterprise CCM solution.



Capabilities that Support Operations / Compliance Teams

Feature

Business Impact: What does this mean for you?

- | | |
|---|---|
| <input type="checkbox"/> A modern and comprehensive API suite | Improve automation and interoperability between the CCM solution and other technology points in your organization. |
| <input type="checkbox"/> A marketplace of prebuilt accelerators and integrations to core systems and other supporting technologies | Improve time to value by leveraging pre built and validated integrations. |
| <input type="checkbox"/> Cloud-native, multi-tenant SaaS architecture | Benefit from constant innovation while removing requirements for managing/deploying upgrades. |
| <input type="checkbox"/> Elasticity to ensure capacity to reach peak volumes | Harness the ability to automatically scale to meet peak demands elastically. This removes costs required to procure and manage resources for these peak periods. |
| <input type="checkbox"/> Zero deployment/browser-based tools | Eliminate the costs associated with managing software installations on local machines. This improves operational agility and provides open access across your organization. |
| <input type="checkbox"/> Modern cloud security standards such as ISO/IEC 27001:2013., SOC1 and SOC2 Type I, PCI-DSS, HIPAA | Instill confidence that your data is being kept safe, secure, and private to maintain compliance and reduce risk. Integrate into SIEM solutions to actively monitor access. |



Achieve More with SmartCOMM™ from Smart Communications



Multi-Tenant SaaS Architecture

Our robust multi-tenant SaaS architecture simplifies the management of your critical customer and business communications - allowing for seamless updates and scalability across your enterprise.



Unparalleled Interoperability

Whether you're looking to connect to a core system, integrate with e-signature, or run a headless service, SmartCOMM offers a full range of APIs to seamlessly connect to your wider ecosystem.



Agility to Respond to Changing Customer Demands

SmartCOMM provides easy to use tools that allow organizations to add new channels of engagement quickly and easily – future proofing your business against changing market demands and competitive threats.



Enhanced Employee Experiences

SmartCOMM's business-user friendly interface and modern standards make it easier for companies to onboard new employees and find resources with the skills to operate within it.






Lower Cost of Ownership

As a cloud-native true "CCM-as-a-service," enterprises benefit from significant cost savings in retiring legacy architectures, reducing technical debt, lessening IT reliance, and improving operational efficiencies.

To access a printable PDF version of this complimentary checklist, [click here](#). If you're ready to learn more, why not speak with one of our experts?

We're happy to help answer any of the questions above, or even help you in your process of building out a more comprehensive RFI/RFP process. We've helped hundreds of organizations modernize their CCM approach. If you're not quite ready to move forward with upgrading your CCM processes, now's the time to learn more. Read our [Ultimate Guide to CCM Software & Strategic Solutions](#) to find out the right next steps for your organization.



Connect with us   

Smart Communications™ is a leading technology company focused on helping businesses engage in more meaningful customer conversations. Its Conversation Cloud™ platform uniquely delivers personalized, omnichannel conversations across the entire customer experience, empowering insurance companies to succeed in today's digital-focused, customer driven world while also simplifying processes and operating more efficiently. Smart Communications is headquartered in the UK and serves more than 700 customers from offices located across North America, Europe, and Asia Pacific. [CONTACT US TODAY!](#)