

# CUSTOMER COMMUNICATION MANAGEMENT BUYER'S GUIDE

Companies today are challenged when selecting the best CCM software for their business needs. While searching for a solution, many identify their current requirements, and seek software that meets those specific demands.

In such a rapidly evolving environment, where customer experience is so crucial, it makes sense to consider future potential requirements as well. Below, we identify a few of the key features that should be included when considering a purchase of customer communication management software.



## CCM SOFTWARE FEATURES

WYSIWYG Template Designer	Embedded Analytics	Forms for Data Capture
Asset Library	Output Formats	Digital Experience Layer
Customer Communication Preferences	Multichannel Communications	Document Storage
Scalable Generation Engine	Document Assembly	Document Archival
Batch or On-Demand	Print Queue Management	Workflow Management

A more detailed description of each of these features follows:

## TEMPLATE DESIGN AND COMMUNICATION GENERATION

1. User-friendly template design tool that enables business users to build communication templates with drag and drop capabilities, rather than requiring busy IT resources to code.
2. Version-controlled asset library, that maintains the latest logos and branding information, approved language, etc. for users building templates.
3. Stores and executes communications based on customer preferences such as language, tone (formal/casual), template and channel (print, email, SMS, etc.)
4. Scalable communication generation engine that maps inbound data to the user-designed template. The solution must be able to grow as communication demands increase.
5. Batch, on-demand and interactive generation is required to support varied use cases.



## ADVANCED COMMUNICATION GENERATION, ASSEMBLY AND DISTRIBUTION

1. Included analytics capabilities such as charts, graphs and tables that can be embedded into communications.
2. Generates documents in a large variety of outputs: PDF, Word, PowerPoint, RTF, HTML5, TIFF and dozens more.
3. Creates and distributes multichannel customer communications (print, PDF, email, SMS, among others).
4. Assembles multiple documents and other assets together into a single output—for example, new account welcome kits or insurance policy packages.
5. Manages the outbound print queue for physically printed documents.



## DIGITAL EXPERIENCE, DOCUMENT STORAGE AND WORKFLOW

1. Displays forms and fillable PDF's for users to complete one-on-one communications.
2. Includes a digital experience layer for customer interaction and eSignatures that can be embedded into mobile apps and customer portals.
3. Stores communications for retrieval and presentation to the user. For example, send a customer an SMS message with a link to a rendered and stored interactive HTML5 document.
4. Long-term archival and retrieval of aged communications.
5. Workflow capabilities that identify the process for these (and many other) steps in the communication lifecycle. The workflow should be easily built and managed by a business user in a graphical drag-and-drop interface.



## CUSTOMER COMMUNICATION MANAGEMENT BY ECRION

The above list is a small sampling of capabilities in Ecrion's customer communication and customer experience platform. Like all others before it, our fourth-generation software was built fully in-house as a single, comprehensive, and modular solution.

With over 20 years' industry experience, Ecrion's experts stand by to help you enhance your customer experience, reduce operating costs, and take control of your document automation processes. Thousands of companies and government agencies across the globe and a broad range of industries ensure compliance with corporate branding and legal standards while establishing genuine connections with their customers—one at a time.

Please click [here](#) to speak to an expert today.

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