Print / Mail Consultants
Corporate Customer Communications Analysis Plan

Executive Overview

Many companies who embark on an analysis of their customer communications severely underestimate the effort that is required. As a result, the projects often never get finished. If they do, then the scope of the project frequently gets trimmed down to a manageable size, such as limiting the effort to the establishment of a consistent style or format, or enforcing the use of only approved logos and colors.

The entire set of customer communications is rarely studied; frequently, only those documents that are commonly known and understood are included such as bills or marketing materials.

By the way, we use the term "document" throughout this plan as a reference to any customer communication. The communication may be printed on paper, but may just as easily be conveyed in an electronic form or even spoken by a company representative in person or on the phone. It is important that all customer communication be consistent with the overall strategy, regardless of the communication channel.

Just as important as a consistent look and feel of documents are consistency, clarity, and relevance of the messages themselves. Documents that seem to contain contradictory messages or are difficult to understand have little benefit to either the company or its customers.

Equally important for effective communication is the ability of the company to accurately render the documents and get them into the hands of their customers at exactly the right time. Messages that don't get seen by the intended recipients or are regarded by the customers as unimportant are a 100% waste of money and effort.

This plan has been developed to help you address all those important points when it comes time to assess how you are executing your company's customer communications strategy. We've written the plan to match the needs of a typical large corporation. Your particular organization's existing document workflow may already handle some of the tasks that are suggested here. If so, that's great! But even then, it is important to be as objective as possible about how documents are created and distributed, how they relate to other documents, and why they exist in the first place.

This objectivity is difficult to achieve from within the system. When things have "always been that way" it's tough to recognize that there might be a better approach. Internal staff exposure to alternative methods or new techniques is limited - especially when education and travel budgets have been slashed.

If you believe that you'll get faster results and a more objective analysis by using an outside source, we hope you'll consider Print/Mail Consultants. We've seen lots of solutions in organizations of all sizes so we can bring you fresh ideas and approaches. And we can transcend the political and departmental boundaries that are barriers to in-house resources. We stand ready to help you out in whatever capacity you feel is useful.

Here is a summary of the various steps we've included in this plan:

1. Establishing your overall customer communications objectives
2. Reviewing all your current customer communications
3. Comparing existing documents to the objectives
4. Making modifications
5. Setting a consistent look, feel, and voice
6. Testing all the variations
7. Ensuring ongoing review and enforcement

Step 1 - Establishing your overall customer communications objectives
The key to any review of your customer communications documents is being able to compare them to a clear and stated objective. You need to be able to look at a document and answer the question, "Does everything about this document support our customer communication objectives?" Without a solid definition of what those objectives are, you'll end up with a hodgepodge of customer-facing communications that are open to interpretation.

What kind of image do you want to set for your organization? What is your key message? How are you distinguished from your competitors?

The way you want your customers to think about you can vary. Some companies want to be seen as trustworthy, stable, and professional. Others may prefer an image of being protective of the environment, or cutting-edge, or fun. Whatever it is about your organization, all your documents should reinforce that message.

You may have more than one group of "customers" with whom you communicate. With each group you could have slightly different communication and image objectives. An example might be a company who sells through independent agents, distributors, or franchisees. Your objective for communicating with end-users of your product may be different from the way you communicate with the intermediary groups. Documents intended for each group may have a different look, feel, and tone.

Graphics, fonts, colors, logos, layout, and writing style can all either reinforce the words in the message and the overall objectives or muddle them. Choose these components wisely as they will be used over and over.

Your corporate executives probably have a definite idea about how they want their company to be portrayed, perhaps developed with the aid of a public relations firm, advertising agency, or marketing organization. Make sure that you've got a crystal clear understanding of exactly what that image is. If policies and standards to support those overall customer perception objectives have not yet been established, then work with a group such as corporate communications to get the guidelines set up, approved, and distributed.

Ideally, there should be a centralized repository for commonly used resources such as logos, fonts, and signatures. Even text blocks, such as frequently used disclaimers may be cataloged in the repository, along with information about colors or other standards that apply to customer communications.

Once the objectives have been established, you will have a solid baseline upon which to base your decisions in all the subsequent steps.

Here's an example:

Suppose a community bank wants to have a reputation for being an institution that can be trusted, supports local business, and is a friendly place where customers can be treated like the neighbors they are.

Now suppose that during your review, you run across a document that includes a page full of disclaimers covering every possible condition with any possible customer, written in incomprehensible legalese, and printed in grayed-out 8-point type. Does this document support the overall objective?

Probably not! You don't subject your neighbors to copious amounts of backside-covering jargon if you want them to trust you. This document probably goes into the "consider for revision" pile. You'll still have to include any mandated text, but there are ways to minimize the negative impact on your company image and still comply with the law. More on that later!

Step 2 - Reviewing all your current customer communications
This isn't as easy as it sounds! And it can be horribly time-consuming.

The objective here is to get a handle on your existing customer communications. This includes samples of personalized documents, forms, screen shots, any inserts or generic information that is included, and envelopes. Try to get samples on the original stock that is used, as there is often pre-printed information on the back.

While gathering these samples, get as much information as possible about which department produces the document, the contact people, the production schedule, and any selection criteria or variability, such as data-driven inserts.

The reason this task is so daunting is that outbound, customer-facing documents can be created and distributed by a number of different sources – both in-house and outside the organization. Some of these sources are obvious and others not so much. And it's likely that not all of the documents are produced in a centralized facility. Tracking down all the jobs takes some detective work!

Start by getting lists from your in-house centralized document operations or your outsource print services provider. Note that for larger organizations, there may be more than one of these centers in different geographic areas. Get information about the jobs they run. Then check with the mail centers. Are there mail pieces that come in from sources other than the centralized print facilities? What are they? Where do these come from? How often?

Do you have an in-house reprographics department? Ask them about jobs they've printed that seem to be composed of customer-facing documents and then track them down.

Talk to the copier fleet manager. Which units are used the most? Are there jobs being printed on the departmental level that are not passing through the corporate print/mail center? Are there departmental printers that are not managed as part of the fleet? We've seen this type of "under the radar" communications occur in other companies. It might be happening in yours.

Check with accounts payable and ask for a list of all the departments who wrote checks to the USPS or a postage meter manufacturer last year. In almost every large corporation there are stealth postage meters that are unmanaged by the mail center. What jobs are being metered on these auxiliary meters? Talk to the departments and gather document information about the pieces they are mailing. This exercise may also uncover postage permits, PO boxes, documents mailed with full-rate postage stamps, or Business Reply accounts that were previously unknown to the centralized mail facility.

Accounts payable should also be able to give you a list of outside service providers that are being used – direct mail firms, ad agencies, copy centers, etc. who may be producing outbound documents.

Don't forget electronic messages! An interview with the groups responsible for outbound email, web site, or other electronic media should produce a list of documents that are either sent out or are seen by customers and other website visitors. Some of these may mirror printed documents, others may be electronic only. Electronic communications often result in customer requests for hard-copy documents, so check with in-house or outsourced fulfillment operations too.

Talk to any department who has direct contact with customers. This could include customer service, accounts receivable, billing, and collections. Get examples of any forms, pre-written letters, and ad hoc letters that may be going out. Also ask about electronic documents. Do any of these departments correspond via email and attach PDF or Word documents? Get copies of any scripts that are used by customer service, or inbound/outbound telemarketing.

A conversation with sales will reveal product specification sheets, brochures, white papers, presentations, videos, or other messages that are provided to customers. You'll want to include these critical communications in your analysis as well.

Finally, the marketing department should be able to provide examples of mass-market messages such as radio, TV, newspaper, magazine, internet, and billboard advertising. It's important that the messages included in broadcast media be consistent with other messages that are seen by the customers.

Once you've got your hands on examples of all your customer-facing documents, you can begin comparing them to each other and to the corporate standards.

On to the next step!

Step 3 - Comparing existing documents to the objectives

Hurray! You've done one of the most difficult steps! Getting all that information together and tracking down all the documents from the far reaches of the enterprise was a big job. Now you're ready to start the analysis portion of the project. This is the most important step in the whole process. Often, there are hard dollar savings that are discovered in this step in addition to the identification of documents that need to be modified. Unfortunately, this step is also one of the most tedious. It's going to take some time.

But don't put it off!

All those documents you just spent that effort gathering up aren't static. There are probably people somewhere in the organization right now that are planning on making changes to these documents or adding new ones. This is where it's real easy to lose focus and let the project slide. Before you know it, too much time has gone by and you have to start over at Step 2. After a while the document details you have in front of you will no longer represent the current state of affairs.

This is often a point where clients call us for help. They may have started the analysis project, but by the time they get to this step they realize that success in a reasonable amount of time is going to require some outside help. Fortunately, this is a natural point for us to engage if we haven't been involved from the beginning. We'll start doing the analysis while also checking to make sure none of the customer communications have been missed. With a dedicated resource that is unencumbered by other responsibilities, you'll start seeing results sooner.

Another mistake that organizations sometimes make is changing documents to use standardized graphics, fonts, and formats before they determine the viability of the documents. If the document doesn't pass the test for matching your overall customer communications objectives, then any time spent to make it conform to corporate document format standards is pretty much a waste of time. That's why we've put the formatting comparison later in the plan.

This step is where you compare what you know about each document to the organization's stated customer communication goals. This means reading the documents! And not just the variable parts, but also things like "stock" paragraphs, disclaimers, terms and conditions, etc. Pictures and graphics also contribute to the overall message, so don't overlook them.

For electronic documents, you'll want to click on all the links to make sure that the pages or documents that come up are current versions and that there are no broken links or pages that leave you abandoned and unable to navigate back to where you started.

For paper documents you'll also want to examine the outbound envelopes for messaging, reply envelopes, and any stuffers or inserts.

Part of what makes a document effective at supporting the organizational goals is getting it produced and distributed to the right customers at the right times. Example: Customer acquisition mailings that get sent to current customers probably aren't worth it and just makes your organization look wasteful. Other documents that duplicate a recently-delivered message are questionable as well.

A customer communication timeline comes in handy for some organizations. This would be the time to start one. The timeline may be in the form of a list or could resemble a flow chart, depending on how many branches and options there are. The purpose of the timeline is to see all your communications from an individual customer's point of view. Since you probably have different categories of customers who buy different sets of goods or services there will probably be multiple customer communication timelines to reflect the variation in documents, triggers, and timing.

The value of the timeline is the ability to notice duplication, irrelevant messages, or inaccurate timing through a customer's eyes. The greater the number of origins for customer communications from within your organization, the more valuable this customer-centric view becomes.

It's tempting to start correcting documents as soon as you notice there's a problem. Unless they present a risk of non-compliance or some other dire consequence that must be addressed immediately, we recommend that at this point you simply identify the documents that seem to be inconsistent with the overall objectives. Work through the entire set of documents before you start making decisions about eliminating, combining, or modifying individual cases.

This is a big-picture project. Starting to make corrections before you have a sense of the overall customer experience that is created by your documents can end up making things more confusing. You might make notes about what it is on the document that seems to need attention, or jot down a proposed course of corrective action. But hold off on changing documents for now.

Once you've got your complete list of documents that do not support the corporate customer communication objectives you're ready to move on to the next step in the plan – making the modifications.

Step 4 - Making modifications
OK, we're finally at the step where all that legwork and seemingly endless task of document-reading starts to pay off! Here is where you'll start to make decisions about which documents stay in the production workflow and which ones can be eliminated. Then there are other documents that you'll decide to keep but will want to modify or even completely re-design. Or there may be opportunities to merge multiple communications into one, or to create a new document.

Chances are you're not going to have all the in-depth knowledge to be able to make these decisions on your own. Check with various departments to get their input on the necessity of elements included in their documents that you think might be questionable. Certainly for questions about legal and regulatory compliance you'll need to confer with corporate counsel.

One word of caution when dealing with legal and regulatory compliance people; in our experience they tend to be ultra-conservative. From their point of view, it's better to throw a kitchen sink full of disclaimers, terms, and conditions that cover every customer situation imaginable onto every document for every customer than to risk a one-in-a-million chance of not providing some required notification to one customer. They also tend to read regulations with a very broad point of view. Sometimes an overly-broad interpretation of regulations can result in unnecessarily complex documents or marginally useful extra pages.

Don't disregard the direction of legal counsel, but do suggest alternatives such as simplified variations that cover only relevant situations. No need to include Platinum level T&C's if the customer is only a Bronze customer, for instance.

Your goal is to compare each document to the established goals and objectives for customer communication and corporate image. If the document is an unnecessary duplication of some other communication, or it contradicts other communications, or it refers to old products or programs no longer offered then it should probably be eliminated.

If the document conveys a message in a way that is inconsistent with overall objectives then it probably needs to be modified. An example might be a credit card statement that contains terms and conditions or interest rates for every state in the nation. If the objective for customer communications is to be clear, concise, and understandable then this document may be in need of a makeover.

While it may not be within your power to order a change to the documents, you can certainly make suggestions for improvements. As you do this, keep an eye out for savings that might be realized by reducing page counts, making format changes, standardizing envelopes, consolidating BRM accounts, or standardizing paper stocks. Moving departmental printing and mail metering from the desks of administrative assistants to the centralized document center always results in a reduction of production and mailing costs. It would be rare if you didn't find ways to cut costs during the course of this project.

Step 5 - Setting a consistent look, feel, and voice
Now that you've eliminated unnecessary documents and identified those that need modification, you can work on that consistent look and feel that takes advantage of those resources and guidelines you set up in step 1.

Identifying the documents to change is pretty simple. A visual inspection can find cases where fonts, colors, and graphics have been used that don't match the corporate standards.

Fixing them may be another matter altogether. This can be a manual process, so pick the documents that seem to be most important or are used most often and start with them. There are all sorts of difficulties that you could run into as you are trying to modify documents. The source code for older documents could be missing, or there could be no resources on staff that knows how to use the software. In other cases, it may be difficult or impossible to add new fonts or graphics to archaic correspondence systems.

There may be some shortcuts you can take by globally changing resources, but in many cases each document will have to be edited one at a time. This is particularly true when changing fonts. Certain special characters could be mapped differently, causing odd characters or blanks to appear in the documents when changing from one font to another. Sizes and spacing have an effect too. Pages can break at different points in the text, bulleted lists could word-wrap differently, etc.

This may be an opportunity to move some documents off of departmental proprietary systems and into a centralized document processing center. Without a conversion utility however, this can result in a lot of re-coding. A decision will need to be made about the amount of work it will take vs. the economic and aesthetic benefits of moving the documents to a new platform. These sub-projects are best done one at a time.

Step 6 - Testing all the variations
Congratulations! You got it all done! Now before you celebrate too much, let's review what you've done.

You have possibly eliminated documents, modified them, changed resources, changed processing, printing, and finishing platforms, and modified triggers and timing. That's a lot of places where a mistake could be made.

Before you throw the switch to put new documents and processes into production, testing is in order. There are a couple of aspects to the testing. The first aspect is deciding whether or not the documents are triggered and end up in the correct print queues at the proper time. The second aspect is actually printing and finishing the documents and doing visual inspections. There is no substitute for this process that can be counted on to produce accurate results 100% of the time. Print previews and PDF's can certainly save you time and point out deficiencies that need to be addressed. But until you print actual documents on actual paper stock, using the production printers and finishing equipment, testing is not complete.

As part of document simplification or combining you might have defined multiple versions of the same basic document. The credit card statement we used above is a good example. What used to be a single version that had the same text for every customer may have become a document with variable terms and conditions, depending on the state of residence of the cardholder. You'll want to set up your test data to generate documents for each variation.

As part of the evaluation you might want to produce revised customer communication timelines such as those you did in step 3. This is a good way to make sure that you haven't accidentally omitted a critical communication or inadvertently generated documents for incorrect customers.

Step 7 - Ensuring ongoing review and enforcement
As we mentioned earlier, documents are not static. New documents are defined all the time. There must be a system in place to ensure that all future document development follows the guidelines and uses the standard resources.

One way to do this is to set up a review function. Establish a corporate policy that new documents can't go into production until they are cleared by the reviewer. This policy will need to be broadcast across the enterprise. Expect some resistance. This new policy will need to be frequently reinforced.

You may be able to restrict access to the production environment in the centralized document center to keep unapproved documents from getting to the outside world. However, making the approval process too slow and inconvenient is counter-productive. Those rogue document systems will pop up again, resulting in another batch of uncontrolled documents.

Another component of ongoing enforcement is scheduling a regular review. To avoid repeating this big project a few years from now, set up a review of documents on a regular basis. You may want to break the documents up into logical groups and then review a different group every two or three months in rotation. Those groups with more activity need more frequent reviews.

Most modern document composition systems will be able to report on the documents that have been added or changed since the last review. This information can make the review process much more manageable. You may be able to ignore those documents that have not been touched since the last review.

Regardless of how it's done, approval and review processes are critical to maintaining the consistency that you've worked so hard to achieve!

Project wrap-up
Embarking on a corporate-wide customer communications analysis is not a small project. Particularly for companies with several divisions, product lines, and locations. If you can't designate people who are dedicated to this effort and have sufficient time to follow through to the end, it's best to get some outside help.

There are some other reasons you might want to consider an outside expert like Print/Mail Consultants to help you out on a project like this:

- We can easily work across departmental boundaries. Office politics don't present the roadblocks for us like they do for your own employee

- Getting documents changed and getting testing done often requires the assistance of IT or Document Operations - two organizations that can be somewhat intimidating to business line employees. We're veterans in these environments and work easily with all groups.

- Moving documents from one production and printing system to another may be necessary. This can be pretty complex and requires specialized skills and knowledge not often found in the average project manager.

- We've got the experience you need to be able to recognize other cost-saving or productivity-improving opportunities as we examine your document systems. Suggestions for improvements are often a by-product of our consulting engagements, regardless of the initial reason to bring us in.

- In house employees have limited exposure to document solutions that may be different from those in your own shop. As industry experts, we've got the specialized knowledge to be able to introduce you to alternatives you may never have considered. This could save you considerable amounts of money or open up opportunities to serve your customers more effectively.

We can assist you with your customer communications analysis at any point in the project. You may choose to bring us in to perform only a couple of the steps and then do the rest yourself. We're happy to talk to you about being an expert resource for you in this capacity.

For those who choose to do the project on their own, we've got a coaching program that might be beneficial to help keep the project on track. We can do the coaching without being on site which makes the services very affordable. See our coaching page on www.printmailconsultants.com for more information.

Of course we'd be happy to help you out if you've got a question about this plan. Just drop us a line and let us know what's on your mind: info@printmailconsultants.com