

# Give Business Users a More Active Role in Developing Communication Templates

## Reduce the Burden on IT

How can you take the burden of editing existing communication templates and creating new ones—and associated delays and rework—off your IT department? This is a common question in insurance today as more insurers focus on enhancing the customer experience and improving operational flexibility. As a result, there is a compelling need to give more control of customer communications to business users.

Responding quickly to customer needs and creating personalized communications are important elements of a great customer experience. While the speed of doing business continues to increase, so do the constraints on IT resources, which makes it increasingly difficult to keep up. At the same time, there is also a compelling need to maintain control of customer communications. The information appearing in letters, statements, bills, policies and other customer documents must be accurate. The appropriate contract language, coverages and contacts need to be used for each specific state and product line. The layout, color and formatting must abide by corporate guidelines to maintain brand consistency. Tracking mechanisms for content changes are required to ensure auditability and compliance. In short, IT involvement is unavoidable to establish the required levels of control, security, content management and consistency.

But ultimately, there needs to be a balance between IT and business users. It is no longer realistic for IT to maintain full control of all templates, content, workflows and rules related to customer communications. And, customers are no longer content with generic, mass communications. After reporting an accident, customers want a confirmation letter sent in a timely manner, and they want it personalized with information about their agent and/or assigned adjuster. They don't want to receive a "Dear Claimant" form letter three weeks after they have submitted their first notice of loss. The same applies to just about every communication between the insurer and customer.

It is possible to personalize communications, respond rapidly and meet all the requirements for branding, accuracy, auditability and compliance with limited business-user involvement. (This is often referred to as a "brute force" approach.) But the results tend to be more resource intensive, more costly and less effective when business users are not as involved. Business-user involvement is superior because they know the unique customer preferences and needs as well as the business context and sensitivity for each situation. Business users also have the ability to respond based on the appropriate timing.

The question becomes how to find the right balance. How can IT be confident that yielding some control to business users is wise and beneficial? The answer lies in a disciplined approach based on four specific actions:

1. Implement a modern customer communications management (CCM) solution that has been developed with a user interface designed with business users in mind.
2. Establish one or more business analysts—liaisons between business and IT—who are highly trained in the software for the creation and management of templates and related content, rules and workflows for customer documents and correspondence.
3. Develop and document the entire process for content creation and management, including role-based approvals for key steps.
4. Designate a senior executive or a cross-functional team with enterprise-wide responsibility for the customer experience. This executive or team should monitor all customer communications, documents and correspondence across the company to ensure that both the business and IT needs are being met.

Taking these steps can help to ensure that the right balance of IT and business users is in place to optimize the customer experience and improve operational flexibility.

To learn more, visit [cincom.com/cds](http://cincom.com/cds), or give us a call at **800.2CINCOM**.

## About Cincom

Cincom delivers the most intuitive, customer communications solution in the industry. By streamlining the design, deployment, delivery and management of high-volume, highly personalized communications, Cincom helps insurers:

- Acquire, strengthen and expand customer relationships
- Minimize compliance and regulatory risks
- Reduce operating costs
- Accelerate time-to-market for all their customer communications

Cincom leads the industry in providing customer communications solutions that are easy to integrate, easy to use and deliver a rapid and continuous return on investment.



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