

## Kofax Customer Communications Manager for Financial Services

Kofax Customer Communications Manager enables financial services organizations to better engage with customers, in the manner they prefer, by producing and managing personalized correspondence via e-mail, print and online formats.

### Creating a Better Customer Experience

Financial services organizations face constant challenges in initiating and maintaining customer relationships. Regulatory compliance, negative economic conditions, legislation changes and general market noise could potentially stand in your way.

### Make It Easy to Access Information

We have many options to reach customers today. Busy people appreciate being able to check the progress of a deposit via a web portal, or being kept up-to-date on a loan approval by email or text message. Financial services providers have a strong advantage, because messages involve a subject that is always important to customers: their finances. Customers will demonstrate their loyalty when you make it easy for them to access and understand their accounts.

### Follow Through on Your Commitment

During the First Mile™ of customer engagement, those initial, information-intensive interactions such as opening an account or filing a claim, Kofax technology streamlines and automates processes that were once manual, subject to error and time-consuming. Kofax enables financial service organizations to deliver on the expectation of a fast, hassle-free experience.

*Kofax Customer Communications Manager* carries that focus and commitment forward by ensuring all your communications with customers are timely, customized and convenient. Information is more likely to be read when it's presented in a way that matches the reader's media usage and preferences, and delivering that information using the channel that best suits your customers builds confidence in the relationship and makes them reluctant to switch providers.

It is essential to capture customers' preferences and follow through in using them when selecting a communications channel. *Customer Communications Manager* makes that possible by providing a link to your CRM system that ensures a customer's communications profile is used appropriately for each contact. Capturing all information in one profile and linking that to different output systems ensures delivery corresponds with each customer's preferences.

## The Big Idea

- Integrated legacy output
- Standard software
- Control & flexibility
- Adaptable Customer Communications
- Business Managed, empower the business
- Create personal documents



## Easily Integrate Legacy Applications with CRM

Legacy financial applications are notoriously difficult to modify. Often, customer details are not updated in these systems when changes are made in the CRM system. This leads to problems when using the legacy system to send mail instead of email, despite the customer preferences recorded in the CRM system. Consistency across all communications is paramount, or the disconnect will jar customers and damage their perception of your service. Regulatory and corporate compliance should also be taken into account from customers opting out of receiving marketing materials to ensuring you do not breach anti-spam legislation. An integrated approach to customer correspondence that uses CRM data to integrate both legacy and new documents is essential. The solution is Kofax Customer Communications Manager.

Business managers will appreciate the ability to manage processes around customer communications. In addition, busy IT professionals will find that Customer Communications Manager makes their jobs easier. By gathering output data from your various legacy, operations, IT and CRM applications, and using profiles, industry regulations, business rules and branding standards, Customer Communications Manager will analyze, manage, combine and distribute all of the company's output appropriately and automatically. What's more, you can easily use preferred communication channels from legacy applications, such as email or portals, without the need to modify those sources.

## More Coordinated Communications

Suppose your customer has a personal loan to finance a family car. Due to changes to his details, such as refinancing or a loan payoff, he needs an updated loan statement. A marketing letter is also scheduled to go out at the same time.

Customer Communications Manager clusters these two documents so they are not sent separately, but in one envelope. Or, if your customer prefers, both communications can be attached as PDFs within an email. Your correspondence becomes more personal and responsive to your customers' preferences. Clustering or "householding" documents also mean postage savings.

## Kofax Customer Communications Manager Benefits

- Capture communication profiles to create a business-managed environment for defining communication rules and preferences
- Integrate with legacy applications so there is no need to change, update or replace existing applications
- Analyze, manage, combine, improve and distribute output. This is an optimal use of customer communications profiles that delivers workflow efficiency and cost savings.
- Link to CRM so you can communicate with each customer via his or her preferred channel (e.g., email, fax, text, etc.)
- Facilitate regulatory compliance through the proper use of approved text and quick adaptation of legislative changes
- Empower business users to manage communication channels independently from IT. This creates a level of agility and control that fosters quicker adaptation to changing market conditions.

## The Right Information to the Right Person at the Right Time

### Do You Want:

- Consistent communication with your customers based on their preferences?
- The flexibility to use mail, email, text messaging, portals, fax or print?
- Compliance with current legislation, industry regulations and branding standards?
- Your CRM system to integrate with existing applications, without the need to modify or update your software?

For more information, visit [kofax.com](http://kofax.com).