



Next-Gen ECM and Superior Customer Experience

Every business needs to ensure customers come back for more

By [Kevin Craine](#)

Every business, from a multinational bank to a local bakery, needs to ensure that customers are happy and keep coming back for more. Indeed, customer satisfaction and loyalty are critical success factors for every organization regardless of the size and or type of business. How customers perceive your company and what they say about their experience in social media can have a direct effect on your brand in the marketplace. As a result, there's a new mantra pervading business today: *deliver the optimal customer experience*.

C-suite decision-makers recognize the mounting need to keep and retain customers for a lifetime, but it can be an uphill battle. According to [Ernst & Young](#), the world's third largest professional advisory firm, just 25% of US consumers consider brand loyalty as something that impacts their buying behavior. Research from [Nielsen](#) found that 78% of consumers are not loyal to any particular brand whatsoever. As a result, companies are searching for new techniques and technologies to help them optimize customer experience, lifetime value and loyalty.

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Managing Content and Customer Experience

One important way to improve customer experience is to improve how you use customer information to support that experience. According to [McKinsey](#) & Company, 70% of customers cite poor service response as a reason for leaving. By eliminating antiquated paper-bound processes, automating when possible, and using information in more agile, connected and relevant ways, organizations in all industries find that they can put more thoughtful customer experience strategies into place that make a difference.

In financial services, it might mean easing the stacks of paperwork needed for a new loan application or for new customer onboarding. In healthcare, it might mean connecting the various documents and information in ways that provide better clinician and patient access. In the insurance industry, it might involve speeding the processing of claims for payment. Other industry segments like logistics, manufacturing, government, and more, all benefit from establishing more dynamic business workflows that link together people, processes and content in new and more agile ways.



The ROI of Superior Experience

The results can be profitable for organizations that get a grip on customer experience and loyalty. According to [BIA/Kelsey](#), a repeat customer spends 67% more than a new one, and 94% of customers who have had a great service experience will buy from that same company again. Even slight improvements in customer experience can pay. Studies from [InfoQuest](#) show that a ‘totally satisfied’ customer contributes nearly three times as much revenue as a standard ‘satisfied’ customer. Clearly, there is a great deal of up-side revenue potential in the business of providing consistent superior customer experience.

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ECM Convergence and Customer Experience

How can you get customers to spend more while increasing loyalty? One method is by leveraging the convergence of ECM technology to bring about more powerful customer engagement. Data and content management tools that have traditionally been viewed in isolation or managed in process-centric silos are now coming together in less costly and complex platforms that enable organizations to more effectively respond to the new demands for superior customer engagement and experience.

Here are a few of the important capabilities to consider:

Advanced Capture – By now, the ability to scan a paper document and capture a digital image is a common business practice. Advanced capture takes the idea a step further with the ability to also capture important bits of information from that form or document and automatically digitize and upload that data as well. Distributed (with multifunction printers and copiers) and mobile capture (using smartphones and tablets) extends the power and versatility of advanced capture even further by enabling a number of important customer experience tactics and strategies that become important market differentiators. Distributed and mobile capture increases speed and responsiveness with the ability to capture and process content anywhere, at any time, using any device. It is no longer sufficient to continue to rely on antiquated paper-bound workflow when the very profitability and performance of your organization is at stake.

Content Management – The notion of enterprise content management has been most commonly associated with risk avoidance. Things like information privacy, regulatory compliance and legal discovery are important factors driving common content policies and procedures. But a more expansive approach is emerging that broadens implications and benefits; especially when you consider the capabilities from a revenue generation and



customer experience point of view. Next generation ECM solutions provide a single interface that is tightly integrated across repositories and establishes a dynamic platform to combine content, security and storage with ready-to-use workflow and process management capabilities that speed the pace of business and provide a superior customer experience.

Case Management – To provide a great customer experience, you must manage the process to ensure that each customer interaction has a positive outcome. This is why Case Management is set to take center stage in the ECM industry. In a recent interview on the [Document Strategy Podcast](#), AIIM President John Mancini points to Case Management as one of the top trends in ECM because it brings technology and data together in a way that leads to more valuable outcomes for both businesses and customers. “At the heart of making information useful is looking closely at the intersection of people, processes and information,” said Mancini. “That’s what Case Management is ultimately all about; it’s about the dynamic business flows that link together people, processes and information in new, dynamic, and much more agile ways.” In the end, says Mancini, this 360 degree view of the customer enables organizations of all types to provide more comprehensive and individualized service.

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Viewing and Redaction – Managing content for better case outcomes and customer experience ultimately comes down to the ability to share information in dynamic and intelligent ways that bring about better decisions and service. One way to do that is with more flexible sharing and viewing of information by the people who need to see it, when they need to see it, and without losing control over privacy and security. New document viewers include productivity and other add-on modules to enhance workflow and provide faster data access, making viewing a vital platform to boost customer experience. Since not everyone needs to see every bit of information contained in a document repository, automated redaction features keep sensitive data hidden while otherwise providing more agile information access overall.

Affordability and Integration

Until now, the individual capabilities of advanced capture, content management, case management, viewing and redaction have all generally been deployed in fragmented pockets of technology and process. One reason for this is because acquiring and managing these enterprise systems often required enterprise-sized budgets and an experienced technical support staff, which forced adoption into functional silos with discrete purpose and ROI targets.



Next Generation ECM

Next generation ECM solutions change all that by providing a single platform that brings together the important components of capture, content and case management. This unified structure reduces the cost and complexity of managing the various parts and pieces, and makes it easier to adopt and integrate features across the enterprise for a variety of applications and processes. As a result, companies are in better position to achieve their goals to boost customer experience.

How Companies Benefit from Next-Gen ECM

Organizations in information reliant industries such as financial services, healthcare, insurance and government operations all benefit from next generation ECM systems that are bundled, integrated and provide the next level of responsiveness needed to deliver a consistent and superior customer experience. In most organizations, the coordination of services and information about any given customer or activity most often spans across multiple databases and systems. Multiple departments, personnel and processes are all involved. Next generation solutions and approaches make it easier to collect and coordinate content, tasks and services across the enterprise to achieve positive results for both the business and customers. These approaches and solutions help internal processes run better, while engaging your customers and providing them the tools they need to track and manage their own experiences— giving customers much more direct control.

Enter the Next Generation of Customer Experience

Sustaining a successful enterprise requires more than new customers, it requires loyal ones as well. To achieve this, you must *deliver the optimal customer experience*. Through the tightly integrated features of advanced capture, content management, viewing and redaction, and case management, next generation ECM solutions provide the platform to provide a consistent and superior customer experience. The key is to enable thoughtful data-driven strategies that allow you to be more responsive and relevant in your approach to customer loyalty and lifetime value. Look for solutions and partners that provide the right mixture of experience, vision, and advanced capabilities that leverage the full value of integrated ECM technology to establish consistently superior customer experience.

About the Author

[Kevin Craine](#) is the author of the book “[Designing a Document Strategy](#),” and the host of the “[The Document Strategy Podcast](#)”. His books have sold in over 30 countries and he is a respected authority on document management and process improvement. Kevin holds an MBA in the Management of Science and Technology and a BA in Communications. He is the executive director of Craine Communications Group. For more info visit [CraineGroup.com](#).



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