

Customer Communications Management Solutions

Modern customer communications management platforms bring bold new capabilities but underscore age old challenges

Over the past 12 months, there have been several significant end-of-sale, end-of-support, and end-of-life announcements within the customer communications management (CCM) or document output management software market. These events were foreshadowed by the recent consolidation of the software vendor market which can often bring competing capabilities under the same brand. Alongside this consolidation, the financial services and insurance enterprise market has been investing in CCM platforms—

both upgrades and departmental solutions—which has provided record growth for CCM vendors who offer enhanced functionality for multi-channel and business oriented front end. This marks a dramatic shift in communication strategies and what financial firms are looking for in enterprise platforms.

Building a smarter, future-directed enterprise communication system

In the past, many financial services firms had two distinct strategies: one for print and one for online. The emergence of social media and mobile channels has most often occurred independently from both these channels from an organizational and IT perspective. For example, when an agent portal for an insurance carrier was created, it did not take into consideration internal print operations or template management.

At the same these business-led customer communication initiatives are yielding strong results and timelines which are challenging the status quo operational print support models of most financial firms. The print-centric operating model is no longer setting the standard for communications. Instead banks, insurers and capital markets firms are looking for a path to converge legacy channels with newer, more agile and profitable channels.

This commitment to a multi-channel communication strategy is stretching the boundaries for most IT departments tasked with supporting both the old and new. Recent announcements declaring an end-of-life to legacy platforms are forcing the hands of IT organizations to explore alternative approaches.

Experience matters

Capgemini Financial Services can help with these challenges. As a world leader in transformational business and system integration, over the past 12 months many of our financial services clients have counted on us to support their legacy modernization, conversion roadmap, or IT strategy initiatives.

Using our experience with multiple global brand and project-based engagements, Capgemini's Financial Services ECM practice has developed a proven methodology and powerful set of accelerators to help enterprises sunset old products, preserve critical content, and set on a future-directed path of convergence for ECM platforms and enterprise communications strategy.



What is Customer Communications Management?

At its core, customer communications management is a simple technical issue: templates are created and when a need arises the relevant data is applied resulting in a communication.

In older CCM platforms, the graphical content, textual content, and business and presentation rules were all closely bundled into a proprietary format. Batch command files were created to deliver large data files to engines which in turn ran mail merge routines to produce print files. The print files were then sent to a print operations team and fulfilled on a nightly basis.

All modern CCM platforms still provide this capability commonly referred to as “batch” or “high volume”. Modern CCM-based templates provide for placeholder or reference points which allow for content types to be stored and managed in independent systems. This subtle but very dramatic difference is what distinguishes older platforms and paradigms from newer ones. Without this loose coupling, the dynamic assembly of documents is not achievable at the scale and frequency that multi-channel communications require. This is why migrating older document applications to newer platforms can't be a simple conversion.

The myth of automated conversion

Like the sorcerer’s stone, many financial firms invest significant time and resources trying to find a fully automated conversion tool. Achieving full automation is almost never possible, in many cases trying to seek a fully automated conversion tool often prevents companies from taking an effective transformation path.

Capgemini has conducted successful migrations and conversions from most legacy customer communications management platforms and several modern ones. We know that when you simply ‘lift and shift’ applications from a legacy to new platform, all the current challenges—including cost to maintain, time to market, and complexity—are transferred with the content. The end result is simply a different logo on historic bottlenecks and cost containers.

A smarter conversion approach

The best way to begin a conversion project is to work collaboratively on the solution, not just follow standard roadmaps which don’t take into account your firm’s unique challenges and IT landscape. Capgemini’s Collaborative Business Experience™ helps you define—rather than be limited by—the rules of the game. Collaboration is central to the Capgemini philosophy and a pillar of our service delivery. From strategy development through implementation, our clients benefit from our tailored approach. Working beside you every step of the way, we analyze your challenges and guide you through the transformation.

Our proven collaborative tools and methodologies give you the freedom to transform and overcome resistance to change. We channel the expertise of our technology partners, putting the right tools in the hands of your teams. Guided by the four dimensions of collaboration, we target value, mitigate risk, optimize capabilities, and align the organization to achieve your objectives.

Planning is the first step

We begin each engagement by working with key stakeholders to establish a roadmap of milestones across business, technical, and financial dimensions. Typical activities during this assessment phase include forms rationalization, organization readiness, vendor selection, and proof of concept pilots to establish credentials for the proposed operational model for conversion and to get all respective teams on board.

Implementation is built on proven tools

In addition to these planning and engagement-oriented frameworks Capgemini has developed technical tools specifically for the mechanical conversion or migration of content from one system to another.

The key is extracting and deconstructing the legacy document applications in such a way to empower the migration to the new platform. Working in partnership with Thunderhead and our leading financial services clients, Capgemini has developed an accelerator framework for pulling content from legacy systems and staging these into an intermediary format.

Once staged, transform, tag, and load routines can be developed to bring the appropriate content into your new CCM platform or alternative ECM system. Alongside this powerful tool, Capgemini provides a robust set of documentation templates to establish functional mapping and to drive rapid solution design and platform configuration.

Capgemini’s Enterprise Content Management Practice		
Services	ECM Focus Areas	CCM Platform Specialties
<ul style="list-style-type: none"> ■ Strategy & assessment ■ Implementation ■ Integration ■ Conversion ■ Offshore delivery centers 	<ul style="list-style-type: none"> ■ Customer communications management ■ Image & document management, including capture ■ Records management ■ Web content management 	<ul style="list-style-type: none"> ■ Legacy CCM conversions ■ Thunderhead ■ HP Exstream ■ Oracle ■ EMC ■ Adobe
Capgemini ECM professionals average 5+ years industry experience		



Capgemini & Thunderhead

Thunderhead tools are based on an open system. The rich and native XML capability, alongside the ability to service traditional print stream output and new channel outputs from a common set of design elements creates a truly future facing customer communications platform. This is why Capgemini partnered with Thunderhead to serve our banking, insurance and capital markets clients.

While most leading document and CCM providers can process XML content, the advantage of the Thunderhead SOA lies in its use of XML *throughout* the application-enabled workflow. Thunderhead NOW takes full advantage of XML standards for secure processing of interactive forms and enables single-template presentments of content across channels and devices. This messaging functionality also facilitates integration with ECM applications, leveraging existing investments across systems.

Existing Capgemini extensions:

- Content extracting procedures for Calligo and SEFAS
- MS Word and macro extracting procedures
- Thunderhead content loading procedures

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Our experience with CCM Conversions		
Migration/Conversion Projects	Legacy Platform	New Platform
Policy administration for large global P&C carrier	DocuMerge	Oracle Documaker
Policy administration for large general insurance carrier	Calligo	HP Exstream
Claims processing for large general insurance carrier	MS Word	Thunderhead
Correspondence for large insurance carrier	Sefas	Thunderhead
Correspondence for large P&C carrier	MS Word	Thunderhead
Statements for large global bank	CSF	HP Exstream
Policy administration for U.S. based P&C carrier	DocuMerge	HP Exstream
Cards processing for large bank	JetForms	HP Exstream
Proposals processing for large Wall Street firm	MS Word	Custom

For more information on Capgemini's Customer Communications Management solutions, visit us at: www.capgemini.com/financialservices or contact us at: financialservices@capgemini.com.



About Capgemini and the Collaborative Business Experience

Capgemini, one of the world's foremost providers of consulting, technology and outsourcing services, enables its clients to transform and perform through technologies.

Capgemini provides its clients with insights and capabilities that boost their freedom to achieve superior results through a unique way of working, the Collaborative Business Experience™.

The Group relies on its global delivery model called Rightshore®, which aims to get the right balance of the best talent from multiple locations, working as one team to create and deliver the optimum solution for clients.

Present in 40 countries, Capgemini reported 2011 global revenues of EUR 9.7 billion and employs around 120,000 people worldwide.

Capgemini's Global Financial Services Business Unit brings deep industry experience, innovative service offerings and next generation global delivery to serve the financial services industry.

With a network of 21,000 professionals serving over 900 clients worldwide, Capgemini collaborates with leading banks, insurers and capital market companies to deliver business and IT solutions and thought leadership which create tangible value.

For more information please visit www.capgemini.com/financialservices

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