

Versatile Documents

How to Manage the Multi-Channel Communication



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Introduction

Corporate communication in its myriad forms has evolved considerably over a relatively short period of time. Today, businesses are at the point where less than twenty years after the digital revolution began they are wondering quite seriously about the future of the business document, perceived as a legacy of the past. For these skeptics, the new digital communication channels, social media, and cloud applications already make it possible to circumvent the rigidity and the costs associated with the business document. We should not forget, however, that a document in a corporate context is primarily the expression of a business process of which it is an intrinsic part. Regardless of whether it is paper or digital, the document must serve the purpose for which it is intended, e.g., to inform a customer, firm up a contract with a supplier, or convey instructions from one service to another. The document as a structured information set remains not only an indispensable tool for communicating within and outside the company, but also an essential link in the process of creating value.

Faced with new technologies and their enormous potential, the natural temptation is to anticipate the benefits. For customer relations, new communication channels promise new forms of interaction with customers, all part of a loyalty strategy. The current trend of maximum customization of the customer relationship makes these new channels all the more seductive. It's no longer only a matter of simply keeping customers informed but also of maintaining an open dialog and interacting with them as continuously and frequently as possible. Within a business, and in its relations with suppliers, innovative modes of communication offer a real potential for improving productivity and simplifying processes. Since 2005, France's Public Finances General Directorate has engaged the government in a vast modernization program that includes adopting new modes of communication with internal agencies, private companies (e.g., using EDI, tax "Teledeclarations"), or citizens via web portals.

Swept in a wave of change, businesses are undoubtedly having difficulty anticipating the risks associated with these new modes of communication. If there is a lesson to be learned from the ongoing digital revolution, it is that the means of communication counts less than the purpose for which it being used - to communicate. Regardless of technology, what counts for a business is to make sure it can always communicate reliably with its customers, suppliers, government agencies, and its own internal staff. Communication should be considered not only in terms of new opportunities, but also of the risks to be avoided, such as government late fees, a failure in the supply chain resulting in canceled sales, or loss of customer confidence.

The idea of risk associated with communication is not new, but the problem has a much broader scope than ever before. As modes of communication grow more diverse, and particularly since they rely more on third-party technology or platforms that are not directly controllable, businesses are increasingly exposed to potential failures in their communication processes. Digital modes of communication have the particularity that, contrary to print media, they can be completely interrupted either by a failure on the transmission end, or by the unavailability of a service on the receiving end (e.g., the Internet).

What are the risks?

In January 2014, two young researchers at Princeton University caused a sensation by using epidemiological models to predict the imminent demise of Facebook, considered today one of the giants of the Internet. According to John Cannarella and Joshua Spechler, Facebook's popularity could be compared to the lifecycle of an epidemic: rapid propagation of the epidemic followed by its demise. The two researchers cited the example of MySpace, created in 2003, which lost momentum in a matter of only five years, finally dying out in 2011. They felt that neither market capitalization, nor the clout of company shareholders (including Microsoft), nor the expectations of businesses with their customer links could do anything to check this decline. If the public so decides, Facebook will inevitably fade, as did its predecessors.

This loss would obviously impact businesses that have invested heavily in expanding their presence on social media. Careful analysis shows that a large number of customer communication or marketing processes are already fully linked to one or other of the social media platforms.

Keep in mind what we said earlier about businesses seeking the promised value of new channels of communication. In many cases, the promotion of a brand's products and services on Facebook has at least partially replaced other marketing processes that are more time-consuming or less effective. So the real question is: If this mode of communication disappears, what other channel should be adopted or reactivated in order to maintain the link with the customer? The answer to this type of question is not that obvious when considering not just one isolated case but rather tens of thousands or millions of customers.



The same question can be asked about all customer or supplier communication tools based on an online application or platform (SaaS or PaaS). At a functional level, but also in terms of pure communication, a business that opts for these solutions is entrusting the vital process of communicating with customers or suppliers to a third party. For example, a business may have to issue invoices or process customer files. Though the IT department can hedge against a certain number of risks, such as ensuring the physical security of server rooms and server data, or the confidentiality of data, a company will have no control over certain major incidents. For example, a service provider could be shut down due to a court decision; or a provider could be bought out by a competitor; or the supplier might let quality of service and service level agreements slide for the sake of a more profitable client. A company can lose its capacity to communicate all the more easily because these platforms, regardless of their accessibility, have had to be painstakingly adapted, integrated and customized. Meanwhile they have helped to transform the company's internal processes. The key issue therefore is reversibility.

The vast assortment of communication channels (e.g., mobile, email, various network platforms for social media, custom SaaS or PaaS tools) have made the job of anticipating risk ever more complex due to the number of possible scenarios. During the all-paper era, worst-case scenarios - a lost document, an error in content, an incorrect address, equipment failure, etc. - were fewer. Over the past 20 years, one of the major challenges

of traditional document production and management had precisely been to reduce the occurrence of such risks by industrializing the processes. However, this approach has essentially remained internal to businesses or to the closed loop of their document production service providers. With relative simplicity, a company could ensure the integrity of a process all by itself and, when required, justify the means in terms of the results. For each risk scenario, it could also easily implement a relatively well-defined fail-over procedure. Above all, even the most serious failure did not impact the viability of the communication channel itself or the related business processes. For communication, a company could certainly only count on itself, but at the same time it was self-reliant, with few exceptions.

Ultimately, the main impact of the proliferation of communication channels has been a loss of control and independence that has affected the ability of businesses to communicate under all circumstances, irrespective of external factors. Again, complexity and degree of risk are at the heart of multichannel communications. Beyond the risk of a specific communication channel failing, the real problem centers on the combination of different channels involved in the same business process. The greater the combination, the more the whole process is put at risk. The most obvious impact of a missing link in the chain of communication is on a company's image. It can make or break customer loyalty. In operational terms, each new communication channel tends to alter, if only marginally, the business process associated with it. A corollary to multichannel digital communication - unlike with "paper" communication - is that business processes, which should remain flexible and scalable, become more fragile. In an economy of relationships where communication with customers and suppliers has become at least as vital as production itself, risks in communication can no longer be considered "vertically", i.e., sector by sector. Communication is now a cross-company function, calling for cross-company risk management.

Building a disaster recovery plan by business sector, dedicated to communication preparing for the worst is a familiar exercise for IT departments. But there is no reason that this should concern them any more than engineering and production. Cross-company functions, and especially communication, should all address the specific issue of disaster recovery. Because the function of communicating belongs to no trade in particular, companies actually have every reason to adopt a comprehensive approach, both when it comes to identifying risks as well as developing solutions that serve everyone's needs.

One difficulty however, as we mentioned at the outset, lies in the constant evolution of modes of communication and their relevance to customer, supplier or employee expectations. By the very nature of multichannel communication, a disaster recovery plan calls for continuous quality improvement. It is necessary to take into account both technological developments and organizational changes, new practices, and regulations, etc. We stated earlier that things are so complex that one cannot reasonably hope to cover all conceivable risks. The first step, therefore, is to make some choices.

In the customer's shoes

The first thing to do is to measure the impact of any communication failure on the people concerned, be they customers, suppliers or company employees. The point is really to understand how your contacts (customers or suppliers) actually use a given communication channel and what value they give it. For some, an interruption in communication would mean a total disruption of activity because some required information or validation would not be available. For others, downtime would not be critical but inconvenient enough that they might start thinking about using the services of your competitor. Customer feedback and analysis of customer, supplier or employee expectations are instrumental for prioritizing different communication channels according to the level of problems encountered. However, no general rule applies. Every business, according to the strength of its relationships with customers, partners, or employees, has its own way of establishing communication priorities.

The second step is to associate the type of communication, which the client sees as critical, to the business process that has created it or that is associated with it. A company is therefore sure to identify the most relevant risks for its various stakeholders effectively. A disruption should be examined in light of the critical processes that ensure the uninterrupted operation of the company and its economic viability. For instance, not being able to respond to new customers for 24 hours might have less impact for a business than being incapable of processing requests from existing customers, who have become concerned due to some critical event. Companies generally arbitrate according to four impact criteria: financial, legal, operational, and perceptual. Depending on a company's sector of activity, interrupted communication naturally has a different impact on each of these criteria. In the banking sector, for example, the "Basel 2" provisions require banks to maintain an open line of communication. A communication failure may cause a business dangerously to lose customers, having a direct impact on net bank income. The criteria of perception and financial consequences logically carry twice as much weight when we assess each communication risk.



For each proven critical risk, the breaking point should be determined - the moment when the loss of communication starts to destroy value. A business can calculate this using all the information accumulated in the previous steps. At this stage, the company has mapped out both the risks associated with communications and the modes of communication that are most exposed due to the sheer number of business processes involved or their critical nature. Equipped with a solid information base, a business can now decide on the necessary trade-offs depending on the resources available to it and the strategies it can implement.

A company has only a limited number of strategic options available to manage communication risk. When it is part of the core of a business, it cannot afford to put communication at risk. Eliminating risk is impossible without going back to a system in which a company assumes total control of its modes of communications, but the cost of

this is prohibitive for most companies today. As we said in the introduction, a company cannot eliminate the risks involved with multichannel communication because they are widespread. Regardless of the diversity of modes of communication used, a business is always the one ultimately responsible for its communication, which relies on various channels and platforms. Prevention, however, quickly reaches its limits, particularly against uncontrollable external risk factors. Among conventional strategic options for risk reduction, there is ultimately only one sustainable solution - protection.

Typically, protection strategies are designed to limit the intensity and duration of the effects of risk. Both a defensive apparatus and warning system should be implemented. Applying this approach specifically in multichannel business communication is much less complex than it would seem and is mostly a matter of common sense. In case of problems with a new digitally dependent process, it is not uncommon to hear a chief executive simply ask: "How did we do it before?" This is the key question that needs to be addressed. The point is to protect the ability to communicate. To do this, common sense tells us first to reformulate the question as follows: "Can we do it the way we used to?" or "Can we go back?" The use of multiple channels of communication is certainly risky for a company, but it offers an opportunity to rethink the link between business processes and communication. "Going back" actually means being able quickly to switch each process over to an alternate mode of communication, should the original choice become unavailable, and avoid any interruptions. Reversibility in multichannel communication is first and foremost a question of versatility.

Making document management versatile

Once again, multichannel communication as such provides some of the answers and points toward a logical solution. Usually different modes of communication all fall under the umbrella of a single communication function. In theory they should be fairly interchangeable under certain conditions. For example, if a social media becomes unavailable, an email, a text message (SMS), or a phone call could be used. But for this alternative to be feasible, the business process that triggers or relies on the communication should be completely independent from it. Take the example of a sales department using social media to dialogue with prospective customers from a trade show. The question would be whether or not to exploit the knowledge compiled in the chat history of a social media account - to upload and reintegrate it to the company CRM and make it reusable by other modes of communication. The same goes for sending out invoices by email. If the Internet connection is down for an extended period (e.g., due to a power cut at a customer site), a company could resume the practice of printing out invoices. This suggests that the document flow could be redirected to a print production facility without having to impact any IT procedures.

In practice, reversibility as a protection strategy is based on three main principles:

- Independence: having the option to separate information from its media
- Versatility: being able to redirect any type of input format to any type of output format
- The zero-impact principle: integrating technological developments without interruption and preserving the ability to “go back”

To apply this reversibility approach, each document process must be analyzed and simulated to determine the combination of modes of communication being used. As we have explained above, this would not only identify and measure the critical level of the associated risks, but also reveal the common denominator in these different processes, i.e., the moment in the operational chain of communication when a number of actions use the same process or resource owned by the company. In companies with the most advanced multichannel communication methods, the solution is readily at hand. All written communications to clients and suppliers, for example, are handled generally through a standardized process of composition or production, providing both the highest level of productivity as well as compliance with the company’s document security rules. By implementing these policies, a company has unwittingly established the foundation for an effective policy of risk management: a central point of convergence for most, if not all, of its document processes. The company merely has to turn this mandatory passageway in the document processing chain into a real multichannel document hub capable of accepting any type of document flow and redirecting it to any output channel.

A strategic issue of independence

On paper, the document hub strategy makes it possible to immediately implement the broad principles of document reversibility. To do this, several conditions must be met. Data sources should, for instance, be separate from document templates, which themselves are independent of the different output channels. Each component of the value chain of multichannel communication managed by the document hub would be able to evolve at its own rate without any major impact on the others. Centralized management of document production processes enhances the system by using control points to ensure the quality of the documents produced, compliance with company rules and legal obligations, and the availability of specific production resources. By helping a business to handle all facets of its document processes (data, templates, task sequences, target output channels), the document hub simultaneously achieves the two main objectives of a multichannel communication continuity plan:

1. Model all document processes in a continuous and scalable manner, taking into account the following: the emergence and the obsolescence of output channels, organizational developments and customer expectations, or even inevitably outmoded document composition tools.
2. Define and automate emergency procedures and alerts to quickly redirect communication flows appropriately, according to various business rules.

The real issue is ultimately to determine the precise place for the document hub within the multichannel communication value chain. To be completely independent of all components in the chain, the document hub cannot logically be integrated into it. It must be a distinct node in the architecture, capable of linking all the parts, without restriction or exception. The industry trend in recent years has been to bundle multichannel delivery tools with composition tools. This is an error. This approach does not exploit the full potential of the document hub strategy because it creates a bottleneck, a single potential failure point, which is contrary to good risk management practices. Integration of a new channel or the replacement of an obsolete mode of communication can only be done, in this case, through one composition platform. Similarly, a business would have no access to the functions of other document composition platforms that might meet its specific needs better. As technologies evolve, a company would find itself incapable of linking legacy data sources and new modes of communication, thus greatly limiting its ability to use the reverse process in an emergency.

As for managing the risks of multichannel business communication, the document hub is unquestionably the most scalable and sustainable approach. By optimizing production, the document hub allows companies to adopt a proactive approach to managing their communication risks. When choosing architecture, a company should opt for the complete independence of all the components in its document value chain. This is the only way to ensure complete reversibility in a fluid and automated manner. As new needs and communication channels evolve at an increasing pace, independence is the key for businesses to retain the control and capacity to communicate under any circumstance.

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