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This eBook is an attempt by FCI to make CCM migration, a cakewalk for organizations across all industries.



### Are you ready for Cloud-based CCM?

Organizations are strategically making a move to the cloud-based setup for a number of reasons like IT infrastructure maintenance, software licensing, scalability and higher compliance risk, etc. Additionally, the leading CCM developers are increasingly focusing on cloud-based applications. However, security remains a big concern when adopting a cloud-based setup.

Organizations dealing with huge customer database such as banks, utility, and healthcare services are the most vulnerable to these concerns. Thus, it becomes dubious whether the security of the cloud-based CCM is truly akin to the traditional on-premise platforms.



Moving to the cloud can be a tough decision for organizations especially when it involves risk factors. Here is when organizations can decide to make the right move to a cloud-based CCM platform:

# Roadmap to Successful

# CCM MIGRATION

## WHITEPAPER

Now let's have a look at five of the steps that will make your migration from a legacy application to a cloud-based CCM platform easy, provided that you give the process the adequate time and planning it requires.

### Successful CCM Migration

The communication landscape has created a vast number of opportunities for organizations to grow and reap benefits out of their existing technologies. Organizations have started revisiting their existing strategies to differently streamline and facilitate communications. To reduce cost, streamline operational risks and create smooth processes, it becomes unquestioned for enterprises to migrate to holistic CCM software or a Customer Communication Management platform that improves their entire customer journey.

When apps CCM software was established as a structured one-time based to migrate, organizations have an inherent trust on customer loyalty and CCM acts as a combined hub of storage and delivery interface to dynamic communications as and when preferred by customers.



But extensive CCM migration from a legacy setup involves many challenges. Reaching to a degree of customization in CCM software allows organizations to tailor the solution to get their specific needs and personal context.

### Choosing the Right Cloud-based CCM Platform

Cloud-based CCM technology is not a fall, rather it is a technological revolution that has taken the world by storm. In the last few years, organizations have shifted their focus from traditional hardware-based model to a more scalable, flexible and cost-effective model - "The Cloud".

Small and medium-sized organizations have already realized its importance and have started migrating to the cloud-based setup. The way in which cloud is revolutionizing organizations and helping them deliver experiences to their customers is beyond imagination.

By 2020, A corporate "no-cloud" policy will be very rare, just like how "no-internet" policy is rare today.

Speaking about Customer experience, cloud-based CCM (Customer Communication Management) is one such innovation that comes with a number of offerings and features which equidistantly bring organizational delivery experiences as per the customer's preference. Cloud CCM is already being considered as the next big thing in the customer experience domain and is swiftly meeting the ongoing demands of the new-age businesses. To learn more about how cloud CCM can enhance your customer experience, click here.



### Why CCM Software deserves your ATTENTION?

Providing a great customer experience is quite worth the effort and to lead the race, it becomes important for businesses to enhance the user experience module. This is where a CCM or a customer communication management software comes into the picture. The software enables customer-facing businesses to deliver seamless user experience by providing a site-free process via which businesses can embark on their digital transformation journey.

A CCM software is a planned strategy that enables organizations to design, manage & deliver all out-bound communications - across multiple channels. A future-proof customer communication strategy allows an organization to deliver exceptional, continuous and connected communications and gain real-time insights into customer behaviors.



### What CCM software can do for your business?

A customer communication management platform can help organizations in designing personalized and memorable customer journeys. With the modern and efficient capabilities of CCM software, organizations can enhance user experience and build loyalty by communicating with customers on their preferred delivery channels.

#### CCM software can help businesses by providing them with:

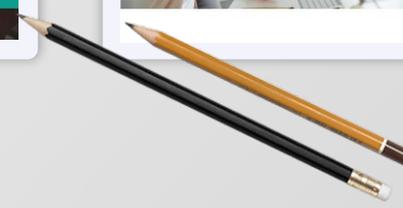


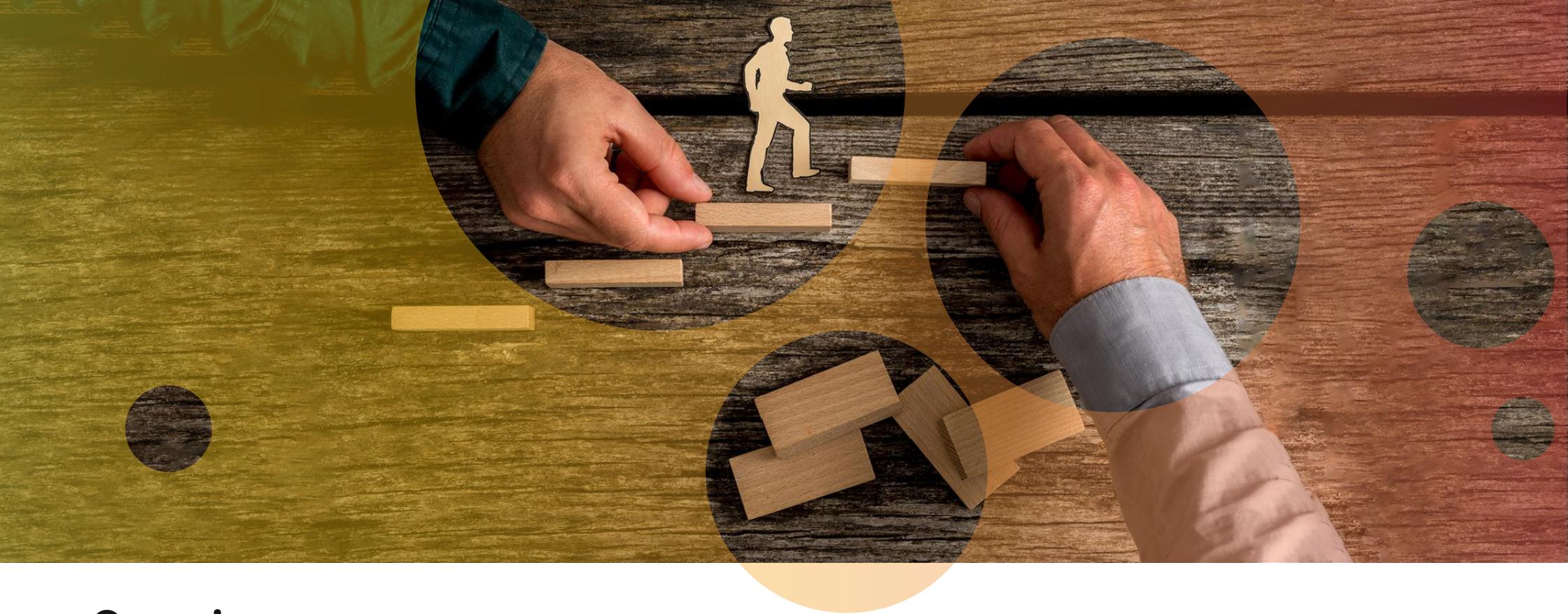
#### Data Driven Personalization

It is very crucial for organizations to deliver experience that is in sync with the collected customer data.

What's more important over here is to organize these data into a way that give meaningful insights. Without a proper process in place, it becomes really difficult for the management to do the analysis and derive the future requirement.

With the help of CCM software the meaningful data can be effectively leveraged in the form of personalized communications and these learning can be used to effectively create micro segments. This will improve customer engagement and can create value out of each interaction for organizations.





## Overview

Ignoring the importance of migrating legacy IT customer communication systems to the next generation CCM solutions is almost impossible. Especially, in the industries like banking, insurance, utility, telecom, etc., where most of the processes are document-intensive. Though CCM migration is a tough task but with the right guidance, it can be a seamless process. The new foundation that will be delivered after the right procedure will last decades and support billions of communication.

For most of the industries, it will be an add-on to the existing setup, successfully supporting new processes & applications, new systems, and new customer communication channels.

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## Tailored Offerings

Many times, software bought from vendors may not suit the business requirements completely. Some business operations might require change depending upon the need of the deployed technology. Also, businesses that use multiple softwares face difficulty in integrating to the third party software. Custom software can seamlessly integrate with the existing software and provide the organization with optimum performance and flexibility. CCM technology empowers the organizations by providing them with tailored offerings as per their business requirement. The tailored software provides long-run solution and scales operations to support the growing business needs.

## Self-service capabilities

An agile CCM software empowers organizations to provide self-service capabilities to their customers on the go. Providing customers with clickable content and allowing them to make decisions while going through the communication can improve the revenue share of businesses rigorously. Customers can make use of the self-service capabilities and update their contact details, raise concerns, request duplicate statements. This helps organizations to boost their operational efficiencies by focusing on core tasks and at the same time increases the involvement of customers.





## Regulatory compliant communication

Organizations often struggle to keep up with the regulatory requirements. In such cases, modern CCM software helps organizations in overcoming the regulatory risk due to the pre-built compliance functionality. This functionality helps the compliance team to see a holistic view of the entire communications package while reviewing and analysing the customer's viewpoint. Thus, imparting organizations to fully control their outbound customer communications.

Owing to the importance of customer communication management and its acceptance in the market, users have also started evaluating cloud-based options.

Technology based on cloud can dramatically lower costs, improve flexibility and workflow, and bring about better business performance. Now, let us understand the importance of cloud-based CCM platform, and how organizations can make a right move to the cloud.

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*Global Customer  
Communication Management  
(CCM) Market Expected to  
Reach US\$ 3,474.6  
Mn by 2026*

*Transparency Market Research*



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Small and medium-sized organizations have already realized its importance and have started migrating to the cloud-based setup. The way in which cloud is revolutionizing organizations and helping them deliver experiences to their customers is beyond leaps.

By  
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**A corporate “no-cloud” policy will be very rare, just like how “no-internet” policy is rare today**

Speaking about Customer experience, cloud-based CCM (Customer Communication Management) is one such innovation that comes with bundles of offerings and feature-rich capabilities helping organizations deliver experiences as per the customer’s preference. Cloud CCM is already being considered as the next big thing in the customer experience domain and is swiftly meeting the ongoing demands of the new-age businesses. To learn more about how cloud CCM can enhance your customer experience, read further.

# Are you ready for Cloud-based CCM?

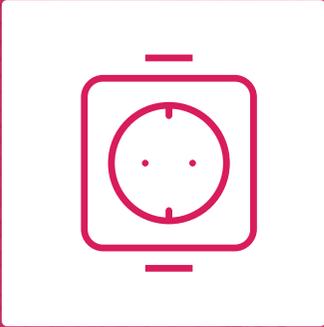
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## Modernizing legacy environment



To address customer communication management challenges, organizations need an agile solution that will enable them with capabilities to effectively manage the digital and physical process of communications. This involves an immediate investment on the organization's part which is a cost-intensive procedure and needs a team of IT professionals to manage the hardware setup. Thus, it is advisable for the organizations to go for a cloud-based setup that will solve the challenges of maintaining a legacy platform. With the cloud-based setup, these organizations can then ensure a structured and centralized control that gives them the opportunity of being agile and stay up-to-date with varying customer needs

## Customizing communications

Customer communications have evolved over the past few years undermining the traditional and static interactions. The new-age CCM technology is more inclined towards providing hyper-personalized and dynamic communications. For this, organizations need to ensure personalization at every level and focus on customer behavior and patterns via different customer touch-points. All this demands the access to customer information and a customer journey mapping technique which is easily possible with a cloud-based CCM technology. Such technology takes customer experience several notches higher as customers can now interact with their service providers in real-time. All customer details, history of transactions, consumption details and much more can be manifested in the dynamic document assisting customers to review/raise concerns while consuming the information.



## Data Security



Any customer-facing organization has a principal consideration to maintain the security and privacy of their customer's Personally Identifiable Information (PII). With the lack of security checks and data leakage, an organization can simply lose their customer's trust and develop doubts in the mind of their prospects. To avoid such scenarios, a next-gen CCM technology uses encryption methodology where the data sets are encrypted when digital communications are being generated over the cloud or even at a trusted print service provider outside the company's firewall. With such an approach, organizations can create communications by collaborating with different vendors but keep the sensitive data within their secured environment.

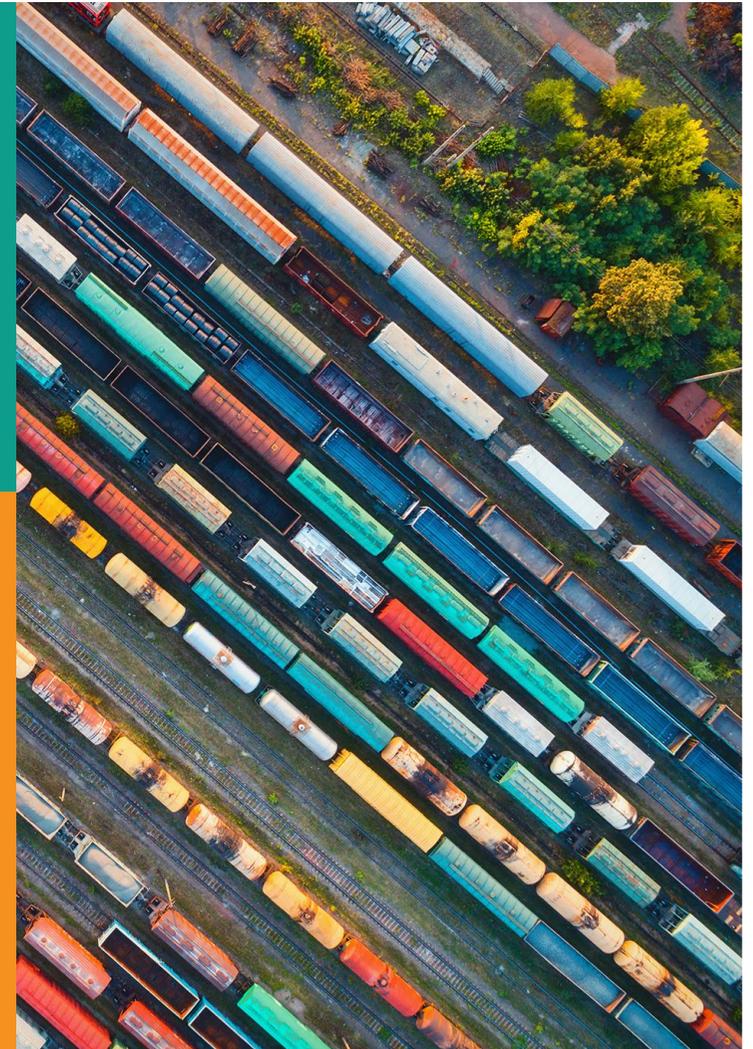
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## Successful CCM Migration

The communication landscape has created a vast number of opportunities for organizations to grow and reap benefits out of their existing technologies. Organizations have started reviving their existing strategies for delivering smarter and futuristic communications. To reduce cost, eliminate operational silos and create smooth processes, it becomes quintessential for organizations to migrate to holistic CCM software or a Customer Communication Management platform that empowers their entire customer journey.

Years ago, CCM software was established as a transactional print-based technology. Organizations today are focusing more on customer-centricity and CCM acts as a centralized hub to manage and deliver interactive & dynamic communications as and when preferred by customers.

But extensive CCM migration from a legacy setup involves many challenges. Reaching to a degree of customization in CCM solution allows organizations to tailor the solution as per their specific needs and personal context.



Successful migration to a single end-to-end customer communications management software involves following steps:



## Analysing Current Processes

By analysing the current system, data, processes, and setup requirements, organizations get a fair chance to evaluate the use of the CCM solution to be deployed.



## Leveraging Existing Setup

The services team can review the existing documents, business logic, code structure, etc., to understand as to what can be optimized, and leveraged during the migration phase.



## Bucketing Communications

Creating small pieces of communications by segmenting them into batch, on-demand and ad-hoc communications. This will help in handling communications with ease and ensuring a unified customer experience.



## Identifying Gaps

Businesses need to identify the area that requires change, and accordingly introduce capabilities and functionalities. This process will help businesses in clearly optimizing time, reducing cost and maximizing returns.



## Defining Migration Procedure

After identifying gaps, organizations need to define the entire migration procedure to identify the opportunities for improving efficiency and creating business rules that gets results.



## Creating Strategy

After identifying gaps, organizations need to define the entire migration procedure to identify the opportunities for improving efficiency and creating business rules that gets results.



## Assembling New Templates

After leveraging the detailed roadmap, it becomes important for organizations to assemble new templates based on the defined specifications.



## Testing Templates

The new templates are then integrated into the systems and tested closely to see if any necessary changes are required.



## Running a Pilot Project

The created prototype can be tested with different scenarios and cases to understand the best combination under which the CCM software can deliver great results.



## Preparing for Contingency

After finalizing the checked details from the success of the pilot project, businesses should prepare for any contingency and act wisely before the actual and complete migration takes place.

With these steps, an organization can ensure that their customer engagement process is seamless and their customers get the right message, at the right channel and at the right time.

## INSURANCE

### Situation

The client was using multiple business applications for their customer correspondence. Due to growth in their customer base, tools were taking too much time to create and send out welcome kits, policy packs, renewal notices, etc. They were also not able to use innovations such as HTML5 dynamic documents due to capability gaps in the existing technology infrastructure.

### Solution

- FCI migrated all their customer correspondence to CCM platform within three months. Now, the centralized platform enables them to centrally compose, manage and send out communications for all delivery channels.
- FCI was involved in end-to-end migration, starting from suggesting the right platform, and CCM software implementation, to application integration and template conversions. FCI also provides managed support for their output generation activities.

## BANKING

### Situation

The client was using two different systems for print and electronic statement generation and distribution. Their operations and marketing departments were spending twice as much time on development with their respective vendors and still, the messaging was not consistent.

### Solution

FCI consolidated everything for the bank with the help of their pre-processing engine to ensure a single instance was deployed to generate communications - irrespective of Bank's channel of communication.

## PRINT SERVICE PROVIDER (PSP)

### Overview

The client is a leader in the multi-channel delivery of critical communications - a fully integrated service provider of print, electronic and mail communications.

### Solution to their Challenges

FCI migrated their customer correspondence from a legacy application to advanced CCM software. The project required integration of multiple data streams in multiple formats as inputs. FCI provided end-to-end CCM Implementation, template conversions, and successfully set-up a centralized system for all delivery channels including print, email, and SMS.

# Migrating the FCI way – Agile, seamless and efficient execution

Backed by 60 years of business experience, FCI has helped many organizations worldwide migrate to a customer communication management platform. FCI's proven experience and subject matter expertise of both legacy applications and a modernize CCM platform have made the transition quick and seamless for our clients.

FCI starts the process by studying the current applications and workflows led by a business analyst who conducts interviews with stakeholders and devises a migration strategy with timelines. The next step involves the assignment of a team to the migration project, consisting of project managers, designers, developers, and quality analysts with appropriate expertise in the successful execution of similar projects.

FCI follows agile development – a combination of DevOps and continuous delivery. Followed by the appointment of a dedicated account manager for coordination between client's stakeholders and the FCI's delivery team.



Since every project and customer is different, FCI's service is designed with the flexibility needed to accomplish the business requirements.

# Impacts

FCI ensures projects are completed in the agreed timeline. However, the DevOps approach allows clients to start using the new CCM platform when the project is still in progress. Salient impacts include:

## Training

DevOps methodology enables client's staff to receive training, and apply it for production, while the project is in progress.

Reading out of the complex hard written codes, our project execution methodology makes it easier to deploy the next phase of changes with proper documentation.

## Reverse engineering

## Quality

Each sprint release goes through stringent quality assessments ensuring process perfection and zero risks of errors.

FCI leverages CCM modules to develop required capabilities, including dynamic documents & interactive communications.

## Enhanced capabilities

## Turnaround advantage

Optimum efficiency using appropriate modules and streamlined workflows result in faster turnaround time.

FCI ensures a cost-effective, timely completion of the project.

## Timelines and Cost benefits



## About FCI

FCI is revolutionizing the customer communications. We help organizations of all sizes deliver amazing digital experience to their customers with the help of dynamic, interactive and highly personalized communications. Our mission is to eliminate the dead, one-way communications and make it easy for organizations to lean on one-to-one customer experiences.

FCI provides customer communication management solutions and services to help organizations meet their business goals, support regulatory compliance, and drive business growth.

Ready to delight your customers?

[Request A Demo Now](#)

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