



Ebook

To Dynamic
and Interactive
Documents

Customer Communication
Management Hub



New business models and communication methods are being imposed quickly because of the digital revolution. For firms seeking to upgrade their operations to meet the growing expectations of customers- digitization is an essential step.

Digital transformation is more than just a technological trend; it is also a shift in company mindset that can and must eventually put the consumer at the centre of communication operations. Consumers are growing more demanding every day, and they want relevant, tailored, and effective communications from firms when they contact them. In this scenario, having a digital-focused Customer Communications Management (CCM) strategy implies allowing your firm to welcome digitization by drastically altering how you communicate and introduce customization.

What are dynamic communications ?

Multi-touchpoint client communications, such as finance, customer onboarding, or insurance products, are excellent for Dynamic Communications. The consumer can view a multi-page HTML document, which is essentially a personalized microsite loaded with their account information, via Dynamic Communications. Customers can verify their details and click between web pages while digitally signing, approving, or providing criticism. Dynamic Communications are a practical approach to conduct meaningful, customized conversations because of their interactive character.

Giving your customers scalability and security during your conversations is what dynamic communications are all about. Customers can respond to messages online and examine and fill forms on several mobile devices using Dynamic Communications if a transaction involves over one exchange.

But how can you achieve these dynamic communications? It is through dynamic and interactive documents.



What are Dynamic and Interactive Documents?

A dynamic document, when experienced dynamically, from the user's perspective, is providing a comprehensive read with optimized layouts, emblems, and infographics.

A dynamic document is a complex consumer contact point from the standpoint of its creation, combining data and many alternatives for everyone involved in its formulation: the original software developers, your IT staff, and the very customers who read it. Its software is dynamic, interacting with the data and intelligently responding to it. You can make it in real-time, with limitless design options.

From a customer experience standpoint, we start with visual impact when defining a dynamic document. An image may be worth a thousand words, but a well-designed graphic can be worth millions.



Customers know they respond to pictures. We live in the emoji and meme era. Every year, visual content consumption doubles or even triples; this reveals something about our content culture.

People like visuals not only because they are easier to digest; but also because they capture the audience's eye and provide concise information with a broad impact. Graphics have multiple dimensions and are a language unto themselves.

Features of dynamic and interactive documents

Dynamic documents can be created in several ways, beginning with an all-powerful, manoeuvrable document building system. One aspect is the **various use-cases it supports**.

Do you need to send a batch of documents to tens of thousands—or hundreds of thousands—of customers? There are options for **high-volume delivery** and the ability to send tailored correspondence on the spot.

You can use completely interactive documents to **make your discussions even more striking**. They allow for a two-way dialogue: the document's interactive components **track client preferences and adjust to what they click on** (and what they do not).

Do your documents have three dimensions of use? In the end, a dynamic document is any communication that interacts with your data systems and **makes intelligent judgments to benefit your customer relationship**.

Conditional formatting would be used in a system with dynamic documents to handle the complexity of a customer base.

The technology would also allow for the **ad hoc updating of sub-documents** – not the master template, but subsidiary ones – to cater to the tastes of a particular group of clients.

The phrase "dynamic interactive document" rounds out the picture. At a place where the customer experience is already multifaceted, thanks to a precise process and a variety of production alternatives at the company's discretion, the company sees instant payback of data, boosting the customer experience while also learning from how customers use the document.

What are the challenges faced by companies when using dynamic and interactive documents for effective customer communication?



The problem of managing different templates



Dynamic language selection



Enforcement of regulatory standards



Review and approval process time



Dynamic document production changes



Reaction to competitor's actions



High customer engagement

To face these challenges, companies should include these four steps in their digital process:

Step 1

Establish A Naming Rule

The first step in formulating dynamic documents is to develop a naming scheme. By defining categories, you may turn a collection of random elements into a toolkit. Classifying document kinds can also assist firms in allocating clients and communicating with them in the most effective way possible.

For all document templates, create, publish, and follow a naming schema. Here is an example of a schema: YYYY-MM-DD Template Type–Template Purpose. This will allow you to classify them by year and keep them neatly organized.

Laying Out The Templates In Folders

One of the most typical challenges in dynamic document template management is redundancy.

Companies frequently develop so many templates over time that they overlook any duplicates that remain.

It is hard to tell which version of the template is the most recent and which you should discard.

Change The Versions Of The Template

While the original template is essential to make uniform modifications throughout interactions, there is also a need for correspondence that is extremely sensitive to the changes on an individual level. Individual and global template editing features are available in dynamic document systems.

Step 2

Step 3

Features Of Recycled Templates

Organizations can adjust branding for the whole template library using a master template in dynamic document creation systems. The goal is to eliminate the need for processing so that the old and new advertising do not get mixed up.

Step 4

Critical areas tackled with dynamic communications for CCM companies



Revenue

Increased income and profitability are the top priorities for customer service firms. You must upsell and cross-sell to customers and strengthen connections. They must also figure out how to get the most out of existing infrastructure, apps, and systems. Finally, they must reduce operating expenses as much as possible.

Dynamic document creation solutions help businesses generate revenue by increasing customer service; that increases customer happiness and decreases customer churn. By lowering reliance on pre-printed stationery and boosting delivery via e-mail and the web, dynamic document composition removes costly traditional methods and reduces document production expenses.



Efficiency

Customers want prompt, precise responses to their questions. Employees want to answer client questions and provide appropriate, customized material to remedy the issue as quickly as possible. Customer and employee happiness skyrockets because of such efficiency.

Dynamic document composition solutions enable firms to quickly resolve customer issues by providing users with a selection of powerful tools and communication options.



Corporate Image

Most customer communication is through documents. Therefore, all customer communication documents must be accurate and consistent to project a professional company image.

Customers are attracted and kept by companies that use dynamic document composition to create a consistent corporate image and clear branding of all document types. When interacting with the company, this offers the customer a sense of comfort and familiarity. All departing documents comply with the brand guidelines thanks to dynamic document composition.





Security

Dynamic document composition solutions offer a safe way to keep customer information protected while allowing users access. Customer documentation in several businesses must adhere to tight regulatory requirements controlling what, when, and how you deliver the message. Organizations can ensure that all documents created follow these regulatory criteria by generating templates that follow them.



Stability

On selecting the document solution, it must contribute to the organization's infrastructure stability by using common standards and ensuring established compatibility.

Using protocols and providing known compatibility, dynamic document composition solutions improves the stability of an organization's infrastructure.



Productivity

When you create hundreds of papers daily or even weekly, companies cannot afford to have people spend hours developing a document. Document production must be streamlined, with automated processes and electronic transmission becoming the norm.

**What are the key
benefits of using
dynamic and
interactive
documents
for customer
communication ?**



HTML 5

Dynamic Communications is perfect for communicating challenging information in a fun way. FCI's HTML5 service allows the flow of content between businesses and users.



Interactive features

The pages can be interacted with by your consumers. They might need to go over a quote or sign off on the terms of a contract. You can do all of this from the comfort of your own home. All compliance requirements are taken care of with digital signature on PDFs accessible anytime, anywhere.



Personalized content

Organizations use customers' personal information to populate dynamic communications, ensuring that customers see the relevant facts at the right moment with proper presentation. FCI's personalized communication solution allows you to simplify content for your customers.



Self-service

Customers can manage their interactions in their own time and in their own way with self-service. They might begin the transaction on their phone, then transfer to a laptop and finish it on their tablet. You can take a look at FCI's seamless integration services across multiple data channels that helps serve their customers better.



Interactive documents are more informative

Standard PDFs are the most simple format for exchanging digital documents like contracts and portfolios, but they are limited in the information they can hold. Interactive papers may handle complex data in a single communication, giving the customer access to a wealth of information; that is simple to browse.



Message delivery

Dynamic Messages can be delivered using the same CCM programme that creates paper communications.



Convenient customer communication

Customers appreciate communicative documents because they have significantly more information than standard formats while saving a significant amount of time interpreting it. Customers do not have to travel through the entire document to get to the crucial information because it is delivered interactively.



Increase in customer interaction

The level of interaction in business material determines the sort of formatting used. Organizations can give more interesting and informative material to their prospects and actively boost their interaction with the documents by employing good documents. Fillable forms can also learn more about consumer demands and tailor messaging accordingly.



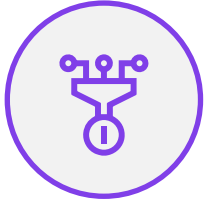
Sparks customer attention

Traditional documents can now include intriguing visual material thanks to interactive document software. The documents will immediately attract the customer's attention and increase the engagement rate by incorporating picture galleries, navigational links, and video files in the text.



Professional look

You must present all business correspondence professionally. Even transactional documents like invoices and contracts must exude professionalism and technological progress. By incorporating rich media, vast customer data, appealing buttons, and calls to action into clever interactive document solutions, businesses can transform standard communications into brand statements.



Increase conversion and retention rates

Interactive PDFs and smart documents provide a better consumer experience, increasing customer satisfaction and conversion rates dramatically. Satisfied customers are considerably more likely to buy and then buy again.



Good business impression

Including interactive papers in new customer contacts can help organizations raise conversion rates even further. Rather than approaching new prospects as a sales point, campaigns might focus on establishing connections and providing value. Potential users who form positive relationships with you will eventually become long-term customers.



Customer satisfaction

Customers use interactive documents to express their dissatisfaction with the company. Their faith in the organization grows because of giving them away to communicate their concerns. The data acquired offers business owners direct client input, allowing them to maintain their brand reputation without provoking public outrage.



Creating memorable experiences

Organizations attract new customers by providing excellent customer experiences to their existing clients. When consumers experience exceptional service, they spread the news to their friends and family. Companies can stand out by using interactive PDFs and smart documents to take traditional communications to the next level to make an impression.



Boosting marketing campaigns

Interactive papers assist organizations in extracting critical information about the customer journey, allowing them to obtain a comprehensive insight into the needs and expectations of their customers. Organizations are no longer required to make educated guesses about what their customers want. They may create marketing efforts that are based on facts rather than guesses, resulting in more leads.

Why are organizations implementing dynamic communication solutions?

The merging of CCM with DCM has come as a welcoming step in the digital space. Competitive offers abound in today's customer-centric company culture, and switching costs are low, allowing disgruntled customers to transfer service providers with little effort or penalty. Customer satisfaction must be maintained and improved for businesses to succeed. Clients frequently state that the level of service they receive from a company is just as important as the company itself.

When companies attempt to learn about their customers and then use that information to deliver a more personalized experience, customers notice. Customer correspondence, particularly one-on-one discussions, print and internet communications, are highly effective touchpoints for providing excellent customer service.

Statistics show 90% of customer correspondence is document-based. As a result, as part of their customer service strategy, savvy enterprise-level firms have introduced dynamic document composing systems.

Besides lowering expenses and increasing productivity, dynamic document composition ensures regulatory compliance. It generates individualized client communications using data gained during real-time interactions with customers and provides a single template design for brand identity management. The most improved predictive document composition solutions also enable document output to print, fax, and electronic channels, allowing businesses to answer in the manner that their customers prefer.



Conclusion

To make optimum utilization of dynamic and interactive documents, organizations must first carefully assess the working of their existing document processes. Upon assessment, they can redesign and eliminate unimportant processes. It will streamline their resources and create phenomenal customer experiences. FCI, a leading CCM company, offers dynamic communications.

FCI empowers consumer-facing businesses in developing functional and efficient customer communications. Our enterprise CCM solutions enable organizations to centrally design, manage, deliver and track high-volume personalized communications - across channels.

Powered by an Omni Channel Communications Hub, the company has helped multi-national organizations in Banking, Utilities, Insurance, Healthcare, Financial Services achieve a 'One Brand, One Platform, and One Experience' Model of Customer Experience Management. With its rendition of Gartner leading products, FCI has led organizations to achieve a competitive advantage for all their transactional communications (batch, on-demand, and ad-hoc) with their customers. More companies are investing in CCM platforms to get an edge over the market and create relevant content that strikes a good impression.

Dynamic communication technology is fast-changing. Choose the one which best suits your organization.

If you would like to learn more about creating fulfilling customer experiences, you can plug into FCI and take part in our journey to make the world a better place.

