

PRO PREFERENCE MANAGER

Manage customer preferences across all communications channels and all document types



OVERVIEW

Customer Preferences have evolved quickly in pace with the wide variety of communication channels that are now available; making management a growing challenge for many organizations. Traditional print and mail documents were once fine for everyone, but now serve only the needs of a select group of the population. Today, consumers have come to expect a choice in how they communicate with their providers, requiring the support for a wide range of delivery methods for their documents and communications including online (ePresentment), mobile (SMS and Apps), tablet applications, braille, large print, e-text, and audio formats.

Today's sophisticated consumer expects to receive critical business communications in their preferred format via their preferred channel. Businesses now realize they must communicate with their customers at the right time, in the right place, and in the right format.

Unfortunately, this is easier said than done. Most organizations have many methods to create customer communications. In many instances there is an integrated billing system that creates the bills; a composition system that creates the statements; then another composition system to create notices. A policy management system creates the policies and so on. Add on numerous generations of systems and solutions inherited through mergers and acquisitions, and the communication creation infrastructure becomes rather complicated very quickly. For most transactional document printers and mailers these are the daily challenges of just producing printed and mailed customer communications.

All of these components play a necessary role in the current printing and mailing needs for transactional communication. In some cases options have been added to specifically enable multi-channel communications, but are restricted by limited access to capturing customer preferences and the lack of channel options available where customer preferences are currently stored. How can customers' delivery and paperless preferences be captured and honored to meet their changing expectations without creating more complication in the creation of communications?

Crawford Technologies has developed PRO Preference Manager to do just that. With a standalone solution with easy-to-use interfaces for creating customers, adding new channels, and managing customer preferences, organizations now have a solution for providing complete multi-channel preference management, including accessibility, for their customers without relying on IT to custom build a solution. Our customers demand the productivity, accuracy, security, and flexibility and PRO Preference Manager delivers.

What does PRO Preference Manager do?

PRO Preference Manager manages your customer preferences for customer communications delivery:

- Receives, records, and maintains digital and physical document delivery preferences for each individual consumer and every document type.
- Provides the ability to go paperless, and suppress the traditional print document.
- Manage preferences for any channel: electronic, print, mobile, web, and in ADA accessibility formats.
- Enables management of accessible document preferences so customers automatically received the accessible document they need without requesting.
- Provides access to these preferences for your existing and future document creation software applications so that they may create content and control files for any channel.
- Includes an interface to enable self-service management or customer service representative to manage preferences in real time.

Productivity

PRO Preference Manager receives, records and maintains the ongoing customer preferences for e-Delivery, accessible document delivery and other systems. A key feature is that it maintains these preferences for each of your customers, and which channel they want to receive them in and which of those documents they want to be 'paperless', so you can suppress printing and save money.

To ease integration there is also an optional capability to process the existing print ready files from your existing document creation systems and automatically create content for any digital channel. As part of this process it can also automatically suppress traditionally printed and mailed documents without any changes to your existing applications.

Accessibility

Accessible channels in particular are poorly managed in terms of preferences as most organizations look at these channels as one off communications; only required on request. Resulting in an underserved market. PRO Preference Manager incorporates these channels into the mix.

PRO Preference Manager addresses accessible preference management from the onset; enabling customers who required assistive technologies to request their required format once and have it recorded so that they receive their communications on a regular basis in a way that is accessible to them. Most organizations manage these requests as exceptions, requiring the consumer to call in every month to request their document or communication in a format they can access.

From Braille to large format, e-text and audio formats, every customer's preference can be captured in PRO Preference Management so the creation and delivery of communications in this format can be automated. Saving both time and money while providing the best customer experience possible.

Flexibility

PRO Preference Manager's flexibility ensures that it will meet all of your needs. Here's how:

- Currently configurable for electronic document delivery systems, as well as ADA accessible document formats such as Accessible PDF, Accessible HTML, Braille, Large Print, audio files and e-text. PRO Preference Manager is easily extended to support other channels as needed.
- PRO Preference Manager receives and maintains your customer's document distribution preferences for all of your customers and their documents. Your existing document creation applications simply query these stored preferences before they create print output or digital document content and control files for electronic delivery systems.

PRO Preference Manager can optionally receive and maintain your customer's document distribution preferences for all of your customers and their documents as well as create print output that honors customers' paperless preferences and create digital document content and control files for electronic delivery systems without changes to your existing document creation.

Accuracy

CrawfordTech has been creating digital document content for online biller direct systems, Electronic Bill Presentment and Payment systems, and other electronic document systems for many years. We understand all of the nuances and requirements of these systems.

Our software is also used in the print and mail operations of the largest transactional document mailers in the world. Our solutions are well known for their reliability and accuracy.

How does Customer Preference Management drive multichannel delivery?

The basic premise of Customer Preference Management is the ability to keep track of the channel that customers require or desire their communications to be delivered in.

It is their preferred way of receiving important communications. When it comes to Customer Preference Management there are three challenges:

- Privacy concerns around sending customer data to e-delivery services that a customer has not subscribed to.
- Need by the mailer to integrate customer preferences for paperless delivery prior to the print process.
- Cost barrier to solving the above.