The Proof Is In The …
Well, It's Everywhere!

White Paper

Game-Changing Proofing
and Approval Techniques for
Print, Web and Mobile

By: Cary Sherburne

Omni-channel communications are not only all the rage, but becoming a necessity in order to reach consumers where they are – or where they want to be – at any given moment. Sounds easy, right? But there are still significant challenges in the process of preparing, proofing and approving these important customer communications. Organizations often have as many as three different groups independently working on communications for print, web and mobile. This can be a costly, time-consuming and error-prone process. And with three different groups … well, consistency of look-and-feel, messaging and consumer experience can be an issue!

This white paper explores the current state of customer communications management as it relates to omni-channel deployment, defines omni-channel versus multi-channel, and explores emerging technologies that promise to take the pain out of this process, streamlining customer communications, improving response rates and time to market and saving thousands of dollars in process costs.

This white paper was sponsored by GMC.
For more information about Dynamic Communications and other GMC solutions, visit www.gmc.net

Table of Contents

Introduction

Today's marketers clearly understand that the consumer is in the driver's seat when it comes to when, where and how they wish to receive marketing and other communications. Whether they are working on a computer at their desk, on their tablet on a plane or using their mobile phone when they are out and about, consumers want a relevant, consistent experience.

Consider a consumer who is responding to an email offering a mortgage. Perhaps she started the process at home on her laptop but was either interrupted or needed more information to complete the application. She later picks up her tablet to resume, and expects to see the same form containing the information that has already been filled out. But wait, she's interrupted again and picks up the process again on her phone while standing in line at the bank. The last thing this busy consumer needs is to have to begin the process again or be confused by information presented in three different formats.

But that's exactly what happens all too often today. It's not that marketers are purposely making the process difficult. That's the last thing they want to do. Rather, it is a process constraint driven by how these communications are developed and deployed. Here's an example of how a customer communication campaign of this nature might be created today.
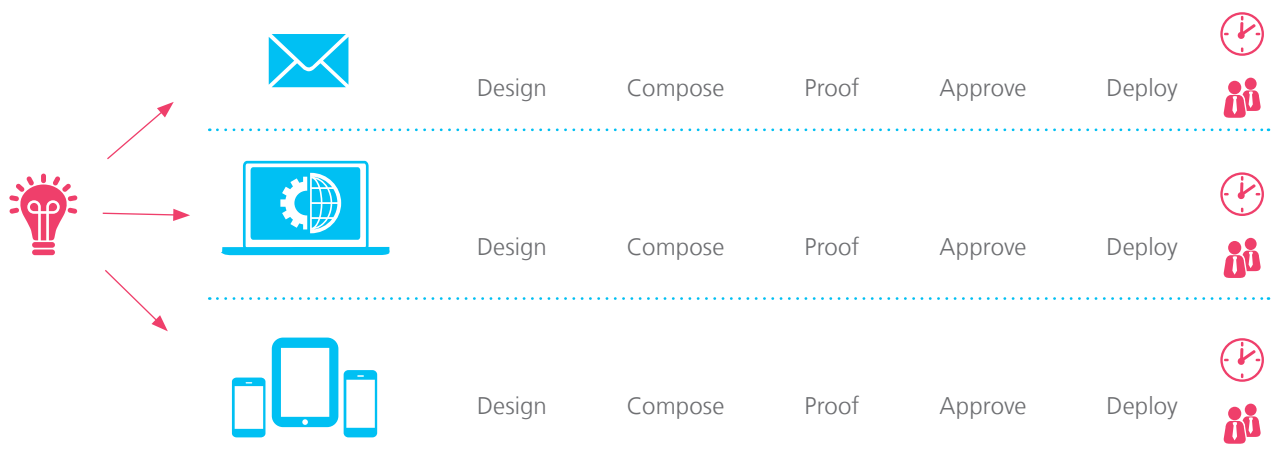
		Design	Compose	Proof	Approve	Deploy	
	✉	Design	Compose	Proof	Approve	Deploy	
💡	💻	Design	Compose	Proof	Approve	Deploy	
	📱	Design	Compose	Proof	Approve	Deploy	

Figure 1: A Multi-Channel Workflow

Three separate groups, three separate designs, three separate workflows … three times the work and three times more possibility of error.

But it is a reality many of us live with, each and every day.

What If …

What if the process were simpler, more streamlined, more accurate … more effective?
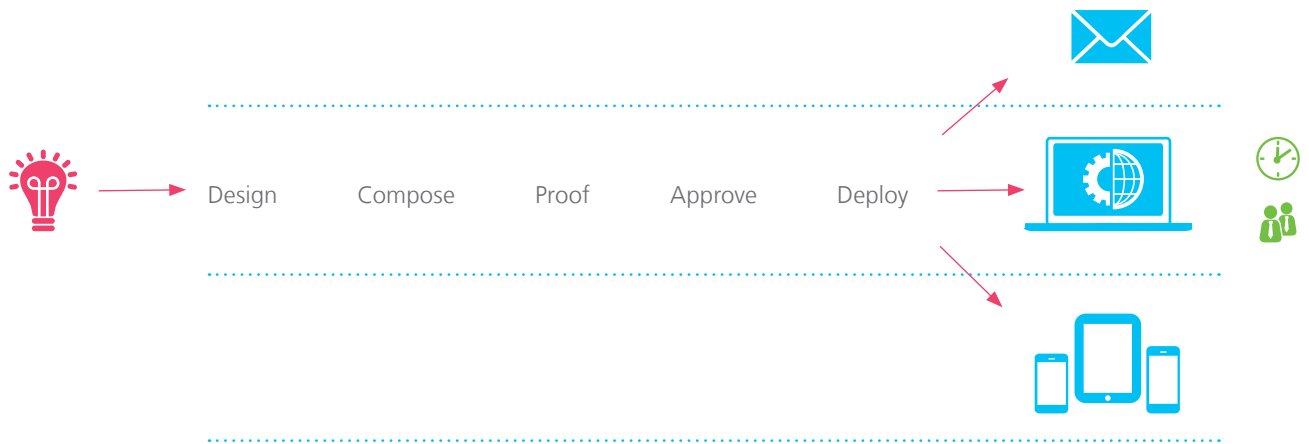
In an ideal world, the workflow might look more like this.

Design   Compose   Proof   Approve   Deploy

Figure 2: An Omni-Channel Workflow

But is that even possible or desirable? Those are the exact issues we will explore in this white paper.

Omni-Channel, Multi-Channel: What's the Difference?

The bottom line is that multiple channels of communication are required for effective customer communications. Multi-channel, right? Or is it omni-channel? What's the difference?

Many people use these terms interchangeably, but they do have different meanings. We found these great definitions in a Business 2 Community blog:

- **Multi-channel:** This term refers to companies using multiple channels (e.g. social media, web and email [and print/mail]) to engage their customers. Companies with this approach are adopting two or more channels to engage their customers; however, they are not necessarily focused on delivering a seamless / consistent message across multiple touch-points. Furthermore, these programs don't necessarily factor in optimizing the customer experience based on the different devices (e.g. smartphones, tablets and laptops) clients use to interact with the business.

- **Omni-channel:** While companies using this approach also use multiple channels to engage their customers, they distinguish themselves through two additional factors: consistency and focus on devices involved within client interactions. These businesses are diligent to ensure that their customers receive the same experience and message through different channels and devices involved within their interactions with the firm. For example, a company that provides customers with the ability to engage it through a mobile app, social media portal and website would be focused to ensure that the look and feel as well as the messages they receive across each touch-point are seamless.

The key here is that omni-channel equates to a seamless, continuous and consistent customer experience across all engagement platforms, while multi-channel does not. In other words, *"do [you] have a genuine 'multi-channel strategy' or do [you] just work across multiple channels?"*

Clearly, both marketers and consumers are more likely to prefer a genuine omni-channel strategy with communications that are channel-independent! But sometimes a multi-channel approach is used due to process constraints, cost considerations and other barriers to the creation, approval and deployment process.

Conventional Multi-Channel Workflow

Now let's take a closer look at a conventional multi-channel communications workflow and examine some of its bottlenecks, issues, risks and missed opportunities. We will examine the following steps in the process:

- Design

- Composition

- Proofing

- Approval

- Deployment

- Tracking and Reporting

- Archiving

Design

As the web and mobile became more ubiquitous as customer communication channels, new design skills were required. Early in the game, communications were typically designed for print and then replicated to PDF or some other digital format for deployment to the web. Over time, conversion to digital formats became more sophisticated, allowing for interactivity within the digital format, among other things. However, the designer (or designers – often multiple designers are involved) is still required to design layouts for the various form factors and media, including the ability to change aspect on tablets. While there are tools available that use templates to make this process easier, the template for each form factor is still a separate file. If last-minute changes are required anywhere in the process, each file must be changed individually. This leaves room for error.

For example, let's assume a last-minute logo change is needed. The designer is in the process of changing the logo for all channels and an interruption causes her to put the project aside and come back to it later. One version ends up missing the correct logo. This type of error, which is easy to make, can cause havoc in the customer communications supply chain, creating extra work, causing grief and consuming time for a wide range of stakeholders.

In the case of multiple designers being involved, there is even more room for error, since the change must be communicated to multiple people in order to have it completed.

Composition

Once the design is complete, content must be flowed in. Using responsive design techniques, this task can be simplified, but with most systems, tweaks to each platform are required. In some cases, these are minor; in others, they are not minor at all but are done in entirely different systems. In addition, because each is potentially designed by a different designer, each platform could reflect a slightly different customer experience, or sometimes even a major difference in customer experience. Linking platforms for a true omni-channel experience can be challenging.

Proofing

Now that everything is ready to go, a person or persons must review each composed document to make sure that everything converted properly and as a final check for errors in content or formatting. If an error is caught at this stage that affects all platforms, the change must be communicated across siloes to everyone involved in the project, and the proofing process must begin again.

In many cases, the only effective way to proof various mobile devices is to use the actual mobile device. With the proliferation and rapid evolution of these devices, that becomes costly and unwieldy.

Approval

Many of the customer communications being deployed today contain regulatory content. If the enterprise is a public company, there are additional considerations required for any corporate communication. This means that multiple individuals are likely involved in the approval process, including marketing, legal, compliance, regulatory and executive staff. Since the format for each platform has been developed separately, separate reviews also must be conducted. These may be done serially rather than in parallel, dependent upon the timing of the project. That opens an additional opportunity for error. Finally, if changes are required at this stage, the communications must go back to the composition and proofing stages and through approval again. Also, the approvers may not be able to ascertain the full impact of the multi-channel experience, especially if reviews are performed serially.

Deployment

The communication is finally ready for deployment. Approved files must be delivered to the appropriate stakeholders, which may be different for each channel, with a coordinated deployment of the campaign to ensure that all platforms are appropriately supported when the recipient receives the communication. This can be a logistical nightmare and again opens up opportunity for error.

Tracking and Reporting

Because this is a siloed, analog workflow, aggregated tracking and reporting is difficult, and almost impossible to accomplish real-time. Since each channel is deployed separately, each is tracked separately and reporting for each must be consolidated to provide a holistic view.

Archiving

Each platform version is archived separately. If a staff member in the call center or sales/customer support needs access to the communication to follow up with recipients and/or address their questions, the communication may look different depending upon the platform the recipient is using – print versus phone versus laptop versus tablet. This can make for lengthier and more confusing conversations as both parties reach agreement on the exact spot in the document concerning the question or discussion.

The Issues

This workflow discussion has identified a number of issues with conventional multi-channel workflows that:

- Increase time to market.

- Consume resources, especially resources of expensive personnel such as the legal, compliance, regulatory and executive staff.

- Are prone to error.

- Do not intuitively provide a continuous, common user experience across all platforms.

Next Generation Omni-Channel Workflow

With the next generation of omni-channel customer communications management tools, many of these issues are diminished or eliminated entirely. Let's take a look at the same workflow steps in a next-generation omni-channel communications workflow.
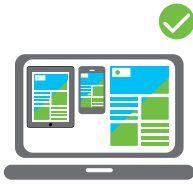
Design

Using next-generation tools, like GMC's Dynamic Communications, a single designer can easily design templates and communications that will be appropriate for all platforms and form factors, delivering a uniform and continuous customer experience and significantly reducing the amount of design resources required. The designs can be tested on all relevant platforms with a click of the mouse and can all be viewed on one screen. These previews are live, meaning interactivity can also be tested. The designer can quickly and easily verify that it does, indeed represent a uniform and continuous customer experience, and also quickly look for errors; i.e., are the logos all displaying appropriately? Do the images work with the individual form factors/media? How do graphs and charts display? Does the navigation work as expected? Does personalization work – meaning is the room for long names or variables and do shorter names or variables display properly? The list goes on.

Composition

Once the designer is satisfied, the project moves to composition. Again, with a single click of the mouse, the campaign can be composed, including associating all data elements, and move to the proofing stage. Rules-based composition means that templates can specify how content is to be organized and which content will be displayed on each device and under which conditions. For example, "If there is no internet connectivity, then do not show this video; use this image instead."

Proofing and Approval

This is where next-generation tools really shine. Because all communications are created through a single interface and often by a single designer, they can also be displayed side-by-side within that interface or exported to a PDF for easy review and proofing of all form factors, including print, in a secure cloud-based environment. Proofing and approval can also be accomplished remotely, better addressing distributed organizations and increasing convenience.

All proofing can be done on-screen; it is not necessary to use individual mobile devices in the proofing process.

This significantly reduces the time and effort associated with proofing and approval of customer communications. In fact, one early user of GMC Dynamic Communications estimates he can save approximately $10,000 per job with just these first three steps.

Deployment

Once everything is ready to go, it can be deployed to all platforms with a click of the mouse. No need to handle each separately.

Tracking and Reporting

Now enterprises have access to aggregated tracking and reporting in real time. Since this is a consolidated project with an all-digital workflow, status and results are more easily reported. Printed materials can contain QR codes or other types of barcodes to add a level of interactivity and tracking to print. Those actions would also be tracked and reported on through the same interface.

All actions taken by recipients are tracked and can be analyzed. This includes how much time they spent with the document, which pages they viewed, the path they clicked through, and even the values they moved slide bars to in those types of interactive images (a good example of this is the ability to change data about a mortgage using a slide bar to choose the length of the mortgage, the down payment or the interest rate.

Archiving

A final PDF showing all form factors can be exported for archiving. This is then easily accessible to call center, customer service and sales personnel whose job can be made easier by seeing the exact format of the communication the customer is reviewing. It can also be useful should litigation or other legal, compliance or regulatory needs arise.

The Results: Future-Proof

With next-generation solutions such as GMC Dynamic Communications, the customer communications process is leapfrogged into the future. Not only are the quality of the communications and the customer experience significantly improved, time to market and costs are dramatically reduced. A typical communication can be converted from print form to true omni-channel in as little as a half hour; a legacy campaign can be converted to omni-channel in a day or two. And clean-sheet designs take a few days, not weeks, to complete. Omni-channel design times can be cut by as much as 75%.

Readers can view live examples of GMC Dynamic Communications at **www.gmc.net/demo**. It's definitely worth a look.

It's the future of proofing (and much more) and could help future-proof your business!

This white paper was sponsored by GMC.
For more information about Dynamic Communications and other GMC solutions, visit **www.gmc.net**