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EMPOWERMENT TALK TRACKS



SESSION 2

Creating a Center of Excellence for Customer Conversations

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CENTER OF EXCELLENCE & BEST PRACTICES EMPOWERMENT TALK TRACK

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TODAY'S CONVERSATION

- Best Practices
- Advanced Training
- SMARTCOMM Center of Excellence
- Q&A



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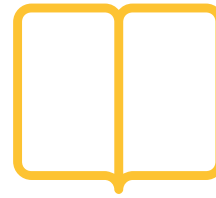


WHY IS IT IMPORTANT?



Define Best Practices

Best practices are key to maximizing the value of your SmartComm implementation and ultimately for your customer.



Customize Advanced Training

Custom Training is recommended for advanced features and techniques tailored to your organizations Best Practices.



Establish a COE for Governance

The governance procedures for the adherence to best practices can be managed by a shared services organization or COE.

Our recommendation is to define best practices, customize advanced training, and *scale* efforts by establishing a SmartComm Center of Excellence.

BEST PRACTICES



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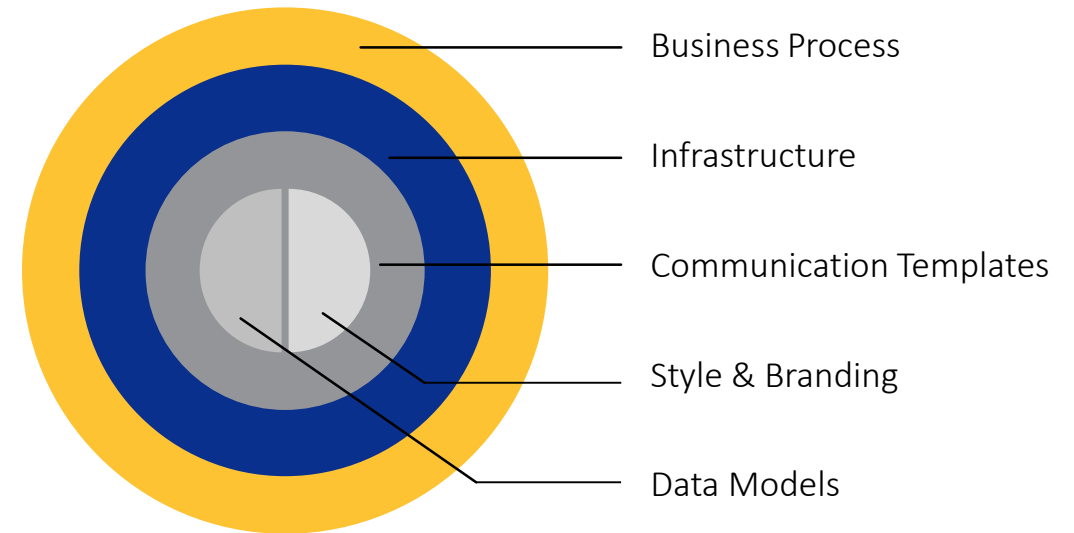
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RECOMMENDED GOVERNANCE AREAS FOR BEST PRACTICES

Especially as customer experience models are changing and unified communication is required across multiple channels, standards and governance procedures are crucial to maximize efficiency while continuously increasing the value of your SmartComm investment.


Best practices are recommended in the following areas:



SmartComm Professional Services *interacts* with enterprise organizations to develop a Center of Excellence for enforcing standards in these areas.

DATA MODELS

Successful enterprise organizations develop guidelines for the data which drives SmartComm communications in order to eliminate development of independent systems which are difficult to maintain.




4.4 billion people have reliable access to electricity
6 billion people have mobile phones

- 1 Decisions regarding common business object vs. template specific business objects requires on-going prioritization of enterprise objectives
- 2 Self service initiatives and considerations for batch, transaction, and conversation driven communication are important
- 3 Organizations should establish a vision for an Enterprise SOA with data transformation layers and standards for multi-channel delivery

STYLE & SHARED CONTENT

Successful organizations maintain a style library to ensure consistency related to branding and image for all customer communications.

- 1 Develop a style guide that defines the branding specific to logos, signatures, fonts related to print, email, SMS, and web channel output
- 2 Establish governance to ensure deviations from the standard styles are approved
- 3 Manage additions to the style guide are approved and then made available to all business areas
- 4 Define standards for shared content for commonly used objects (standard letterhead, address positioning for envelopes, phone numbers, signatures, logos, etc).



SmartComm is rated #1 by Forrester for Interactive and On-Demand Customer Communications as well as Multi-channel Delivery

SMARTCOMM TEMPLATE DESIGN

Best practices for advanced template design as well as common knowledge of new features should be maintained at an Enterprise level to ensure standards are maintained while maximizing reusability.

- 1 Establish a SmartComm SME to receive ongoing advance training and new feature release education
- 2 Conduct a Best Practices workshop – a template is not an isolated resource!
- 3 Align standards with corporate strategy
- 4 Conduct advanced training programs and retrospectives
- 5 Revisit strategies for multi-channel communication and transitioning control to the Business User



Hall of Fame Template Reduction Statistics

From **700 to 300** letters, from **120 to 1** (for 25 languages) agreements, from **1100 to 330** letters

INFRASTRUCTURE & OPERATIONS

Enterprise responsibility for infrastructure and operations is one of the most important governance areas considering common use of the scalable SmartComm infrastructure, open APIs, and multichannel enablement is what enables enterprise cost savings.



Insurance Company Technology Purpose:


97% to serve and support customers

41% to lower costs

- 1 Successful organizations develop standard integration models and in-house expertise related to SmartComm capabilities and open APIs
- 2 Regularly revisit priorities related to SOA and SaaS trends.
- 3 Work with SmartComm to plan for application server, operating system, database, and SmartComm version upgrades
- 4 Consider savings associated with in-house printing or print vendor agnostic output management

PROCESS

Customer engagement priorities are key to project process success. A key deliverable from the best practices workshop are the best practices project templates.



Companies with mature customer engagement models achieve **82%** customer retention vs. **24%** by laggards

The Best Practices Workshop Agenda Includes:

- Sharing product road maps
- Conducting a design review of the current implementation
- Performing a project retrospective to identify process best practices opportunities

Workshop Template Deliverables Include:

- Microsoft Project Plans
- Requirements Checklists
- Project Sizing
- Risk Management Plans
- Test Plans and Procedures
- Project Retrospective Process
- Advanced Training Agenda
- COE Governance Procedures

ADVANCED TRAINING



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TRAINING PROGRAM

Consider a training program for your staff or new hires that builds upon the standard SmartComm product training but takes into account your own template design and workflow procedures.



Attrition is a risk to best laid plans!

- 1 Reduce resource onboarding time with Customized Training
- 2 Develop a self-sustainable approach to creating, maintaining and developing work product using SmartComm systems.
- 3 Customize training resources using your own templates and workflows.
- 4 Ensure consistent Knowledge Transfer for high attrition staff

CUSTOMIZED TRAINING



Customize Core Training using your own templates. Make it relevant.



Desktop Simulations and Train the Trainer



Supplemental Reference Guides documenting best practices for easy onboarding

SMARTCOMM COE



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A CENTRAL ORGANIZATION GOVERNS BEST PRACTICES



The COE is responsible for reviewing new project opportunities, risk assessments, and best practices while business areas own their specific implementations

COE PROS & CONS



PROS

- Resources responsible for standards
- Architecture Design SMEs motivated and empowered to ensure best practices
- Standards defined and governed by committee
- Business empowerment



CONS

- Resources typically have other job responsibilities
- Resources are not involved in day to day SmartComm work
- Resources are more technical in nature and are not as motivated to “sell” future capabilities
- Initial roll out may benefit from more IT involvement

SHARED SERVICES MODEL FOR STANDARDS GOVERNANCE



In addition to governing the COE best practices, the shared services organization owns the standard data transformation layer, enterprise web services, and template design (and shells) for every new project.

SHARED SERVICES PROS & CONS



PROS

- Business area empowerment over time
- Shared service managers motivated to grow the capability
- Shared service managers promote the capability
- Resources with daily SmartComm experience are responsible for standards
- Architecture design and business owner SMEs are motivated and empowered to ensure best practices
- Standards defined and governed by the IT department responsible for P&L
- Advanced planning ensure scalable architecture is ready for project need
- Scalable template development team ensures staff available for projects



CONS

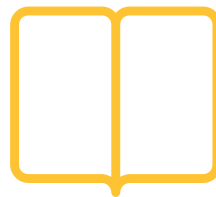
- Job cost and cross charge accounting systems

IN SUMMARY



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