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Digital Transformation Made **SMARTer**

The Customer, The Cloud and Recent Enhancements to Scale the Conversation

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- **Digital Transformation & Customer Experience**
- **Conversation Cloud**
- **Release Highlights**
- **Pure Cloud AWS**
- **Conversation History Update**

Digital Transformation is the New Normal

“Which of the following best describes your firm’s digital transformation?”



56%
Currently
underway



15%
Investigating



7%
Improving but
not transforming



21%
Completed

Source: *Forrester - The Sorry State Of Digital Transformation In 2018*

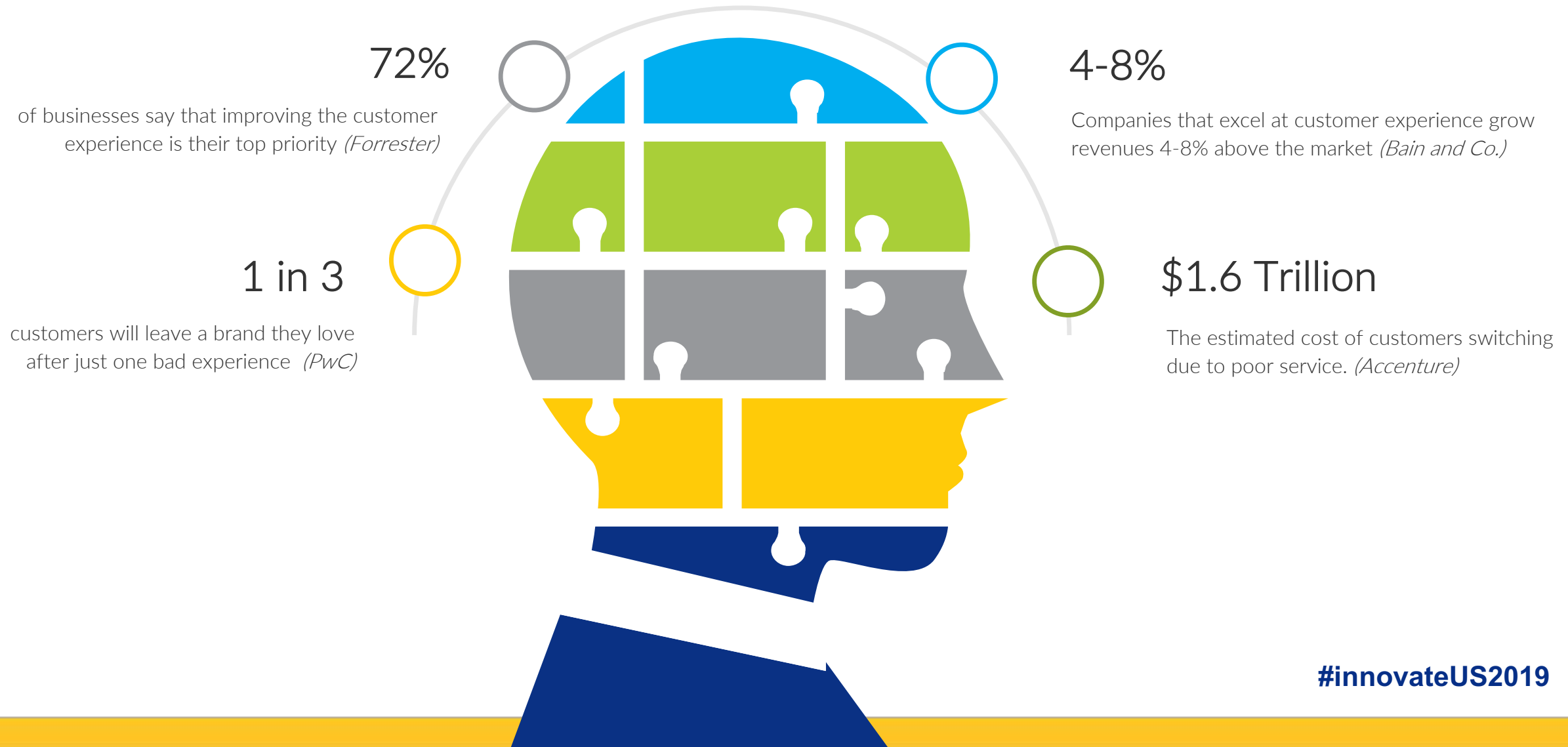
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Digital Transformation vs. Digital Optimization

“75 percent of CIOs and their enterprises will fail to meet all their digital objectives in 2019”.

IDC

The Importance of Customer Experience



“ 64% chose “easy to integrate” as the most important characteristic when selecting a solution, compared with 39% who chose “best-of-breed.”

Forrester, *The State Of Digital Experience Delivery*, 2017

A Typical Technology Ecosystem

Sales & Marketing Systems

Business Support Systems / Operational Support Systems



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Mobile



Voice Assistants



“Alexa...

... tell insurance advisor I'd like to find an agent in my area.”

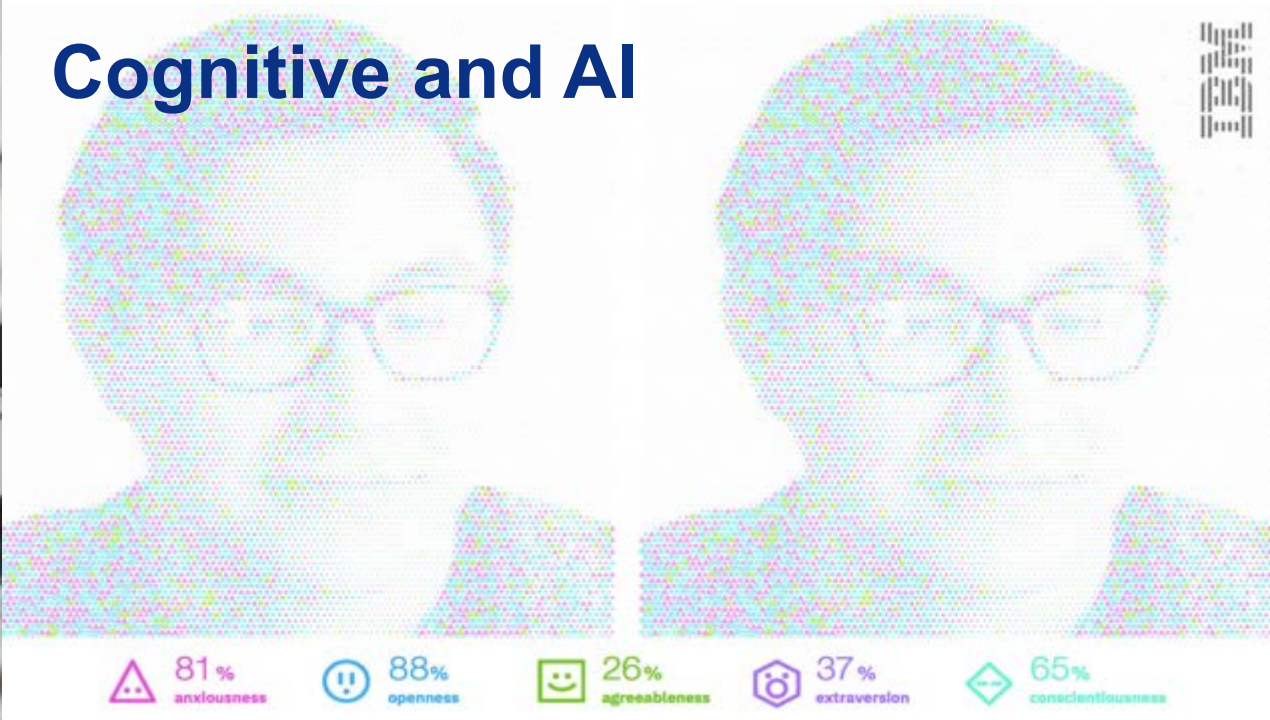
... ask insurance advisor what total vehicle loss is.”

... ask insurance advisor what types of insurance Accordant offers.”

Connected Devices / IoT



Cognitive and AI



The Conversation Cloud Framework



Connect to 3rd
Party Systems



Validated
Plug-Ins



Open and
Flexible



Marketplace



APIs



360° View
of Customer



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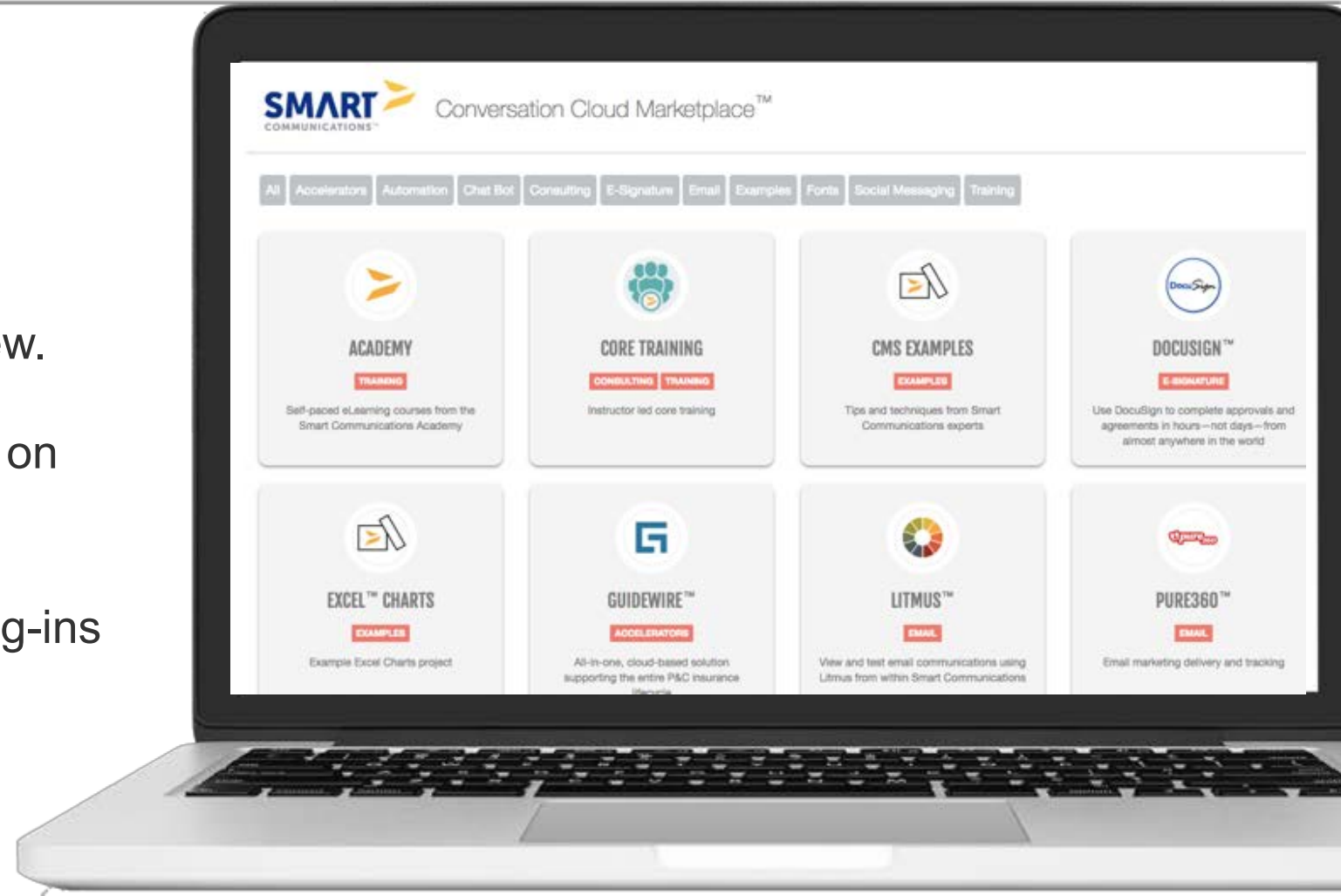
Conversation Cloud Marketplace

Explore validated plug-ins and verified accelerators.

Detailed listings highlighting minimum requirements and a functionality overview.

Each listing offers a demo project guide on how to implement the offering.

Showcasing internal and partner-led plug-ins to extend the value of Smart Communications.



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Our Innovation Themes

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Smart Communications Delivering Innovation

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Customer
Experience



Channels



User
Experience



Content
Assembly



Negotiation



Deployment
Flexibility



Intelligence &
Information



Enterprise
Integration



Partner
Strategy

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Smart Communications

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SC19 Release Highlights

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Job Page Redesign

The Jobs page has been redesigned with a new side panel providing an 'at-a-glance' view of the selected job. This new interface allows for users to quickly browse the details of their jobs without having to open and dismiss dialogs.

Waiting0

In Progress0

Spooled0

Completed102

Stopped57

Errored12

Search

Id	Name	Submitted	Queue	Status	Test
1418	SF Range ProjectId puliJob	03/28/2018 12:46:21	Queue1	Completed	
1419	SF Range ProjectId puliJob	03/28/2018 12:46:26	Queue1	Completed	
1422	SF Range ProjectId puliJob	03/28/2018 12:48:05	Queue1	Completed	
1424	SF Range ProjectId puliJob	03/28/2018 12:49:19	Queue1	Completed	
1425	SF Range ProjectId puliJob	03/28/2018 12:49:40	Queue1	Completed	
1426	SF Range ProjectId puliJob	03/28/2018 12:50:02	Queue1	Completed	
1427	SF Range ProjectId puliJob	03/28/2018 12:50:05	Queue1	Stopped	
1428	SF Range ProjectId puliJob	03/28/2018 12:50:53	Queue1	Completed	
1429	SF Range ProjectId puliJob	03/28/2018 12:50:56	Queue1	Stopped	
1430	SF Range ProjectId puliJob	03/28/2018 12:51:48	Queue1	Completed	
1431	SF Range ProjectId puliJob	03/28/2018 12:51:52	Queue1	Stopped	

51-100 of 171

1234

Completed1426 | SF Range ProjectId puliJob

X Purge Job

☒ Lock

Details

Reports

QueueQueue1

Processed byBulkX19_06-D5-28-00-0B-61

Submitted03/28/2018 12:50:02

Started03/28/2018 12:50:11

Finished03/28/2018 12:50:17

Duration00:00:06

Progress3 transactions processed

TypeTransaction File

Input File/mnt/autofs/input/jstewart/input/health_check.xml

Template SelectorJobsGridTS (12.0.0)

Project NameHealth Check

Salesforce RecordrecordOne

Document SettingdocSettingOne

Output Config Editor

The Output Config Editor within Template Designer has been enhanced across many areas to allow for handling of advanced use cases including:

NEW FEATURE AREAS	
• Output Handlers	• Thresholds
• Disk Output	• SMTP Custom Properties
• Envelope Sorting	• Duplex & Banners
• Custom Output	• Barcodes (Coming Soon)

+ Add Job Setup

Default Job Setup

All Features

General Settings

Thresholds ☒

Envelope Sorting ☒

Spooling ☒

Sorting and Splitting ☒

Print Stream Output ☒

Handlers

Envelope Output

Handlers

Email Output ☒

Disk Output ☒

Custom Output ☒

Barcodes ☒

Codabar Barcode

POSTNET Barcode

Barcode

Name

Codabar Barcode

Position

X

0

mm

Y

0


mm

Orientation


0 Degrees

Type


Codabar


0123456789

Include Expression

 true;

Value Expression

 pageinfo.getChannelProperties()

Height

15

mm

Module width

0.21

mm

Wide Factor

3

Quiet Zone Enabled

True

Choice List: Data Item Binding

In addition to setting Data Items as the default value for Choice Lists at Draft time, users may now *bind* to data item, ensuring that the choice value and the data item value are kept synchronised while editing the Draft document.

- Works for both single selection and multiple selection Data Items
- Works with any type of Data Item
- Multiple bindings supported, providing Choice Relation type functionality

Changes to content in the Draft Editor...

Cover Type: [Third Party Fire & Theft]~~[Comprehensive]~~



...and reflected in the Choice List and vice versa

Cover Type ▾

☐ Comprehensive

☐ Third Party Only

☒ Third Party Fire & Theft

Choice List: Descriptions

Choice List and Choice Descriptions are now exposed separately from the choice title in Draft Editor. This will allow for additional information to be displayed about the Choice or Choice List without using any more screen real estate.

These have also been exposed for editing in Template Editor

This allows for a more forms-oriented user experience when working with Drafts

The screenshot shows a 'REVIEW' form with a dropdown menu for 'Cover Type'. A tooltip is displayed over the dropdown, providing instructions and details for the selection options.

REVIEW

Please select the cover type that the user has:

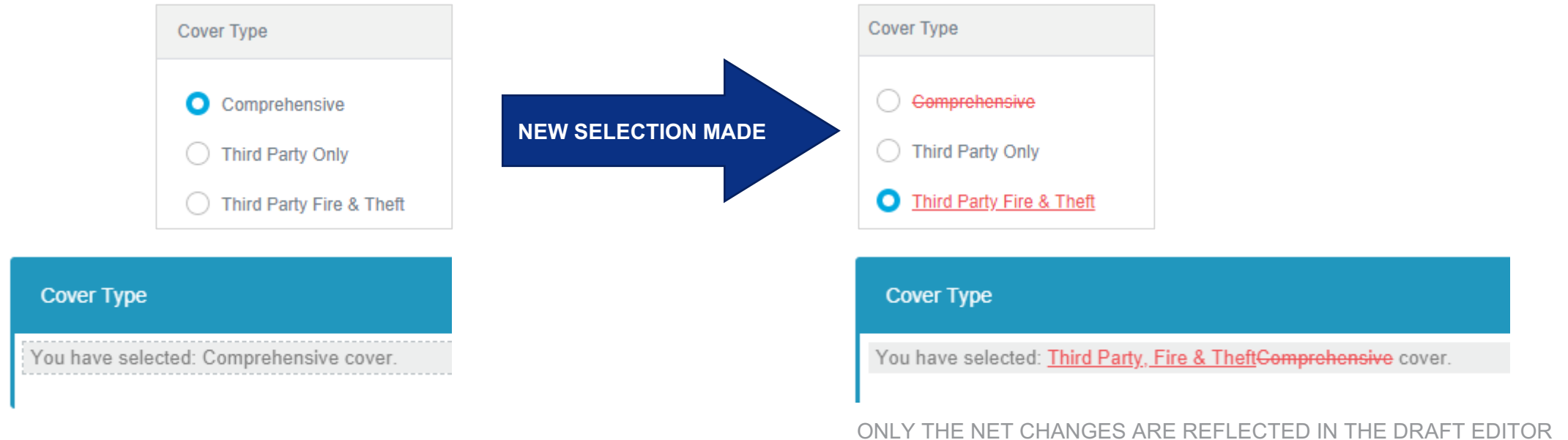
- Comprehensive cover covers all of the parties losses
- Third Party Only cover covers only third parties
- Third Party Fire & Theft covers third parties and losses through criminal actions and acts of god

Cover Type

- ☒ Comprehensive
- ☐ Third Party Only
- ☐ Third Party Fire & Theft

SC19 Hand
SC19 is due to be
Smart Communica
release, known as
Choice List

Choice Lists: Track Net Changes



Choice Lists can now track Net Changes in Drafts

Changes between Choice List values will only have the *net changes* between the content highlighted as differences, as opposed to the entire choice content being marked as inserted for a newly selected choice, or deselected for an unselected choice.

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Minimum/Maximum Values

Draft Editor will now enforce the minimum and maximum values set in the Data Model for dates and numeric values.

This will ensure that any user entered values are within the valid range.

It creates a much more 'form-like' experience for users and simplifies the process of working with Draft documents.

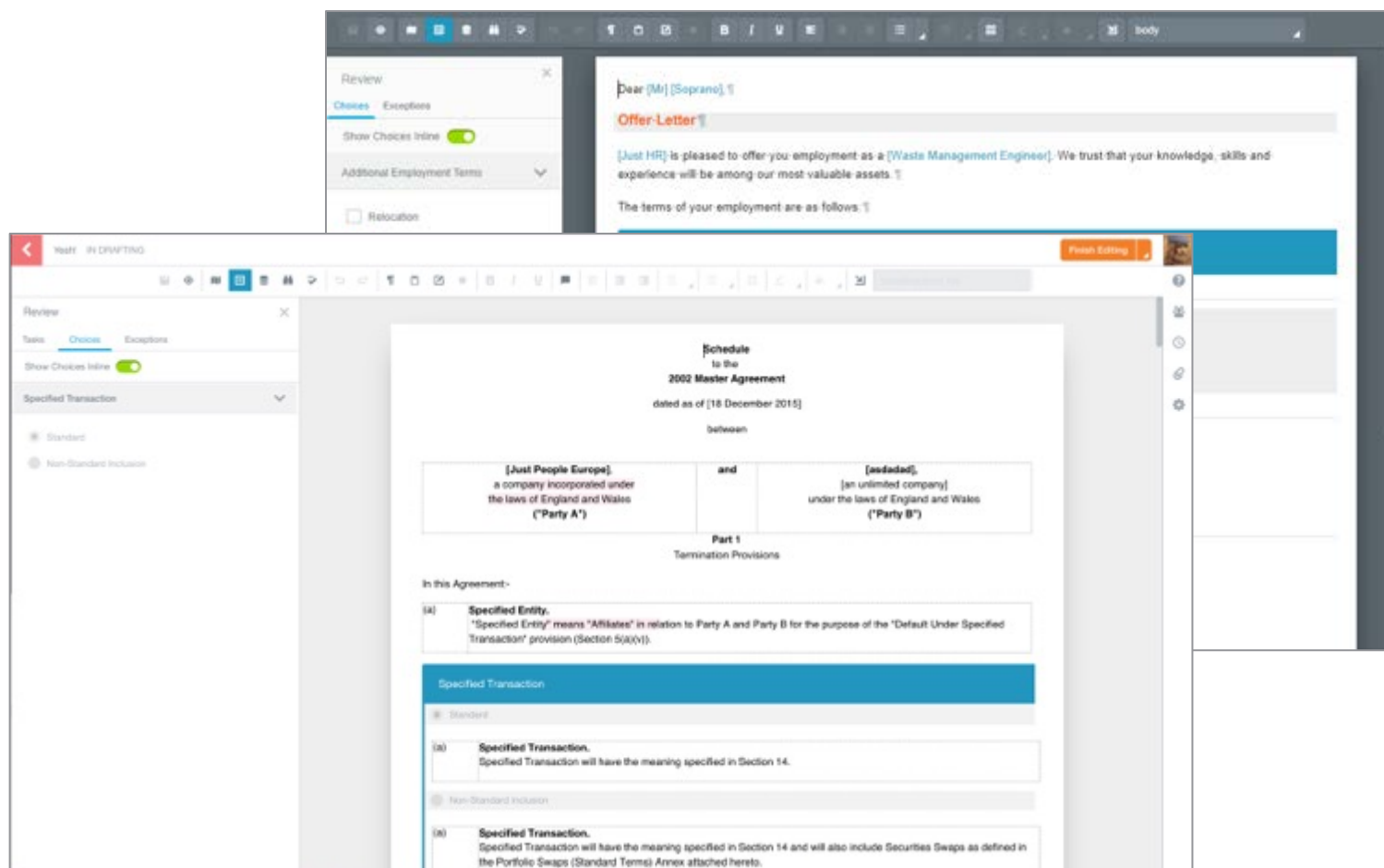
The screenshot shows a web-based form editor. At the top, there is a toolbar with various icons for text formatting and layout. Below the toolbar, a yellow banner displays the message: "Minimum value for 'monthly_premium' is 10". The main content area has a title "SC19 Handover" and a paragraph of text: "SC19 is due to be released to Customer Preview on Monday August 13th and will be live in product". Below this, there is a label "Monthly Premium:" followed by a text input field. The input field contains the number "8" and has a blue border, indicating it is the source of the validation error.

Draft Editor Themes

To help integration within other applications, there is now an additional **light theme** for use with Draft Editor.

The light theme is designed to complement the existing dark theme to provide users the option to select the most appropriate theme for their application.

Themes are configured from the Draft Editor API, with the existing dark theme being the default.



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Copy and Paste improvements

Copy and paste from supported versions of Microsoft Word to the Template Editor and Draft Editor has been enhanced:

- **New Style matching functionality** will attempt to match styles based on matching their names from MS Word and the user's Styleset. Headings will be matched based on heading level.
- **Copying of Individual Images** will now bring the image across to the document. Copying an image and other content will represent the image as a placeholder, allowing the user to quickly upload the image.
- **Subscript and Superscript** content will match on styles named 'Subscript' and 'Superscript' respectively.



Suggestions

Data Items may now be defined to have **Suggestions**. Similar to Enumerations, Suggestions allow for the user to be presented with a list of possible values. Unlike Enumerations, these values are not exhaustive, and the user may choose their own value for the Data Item by simply typing it in.

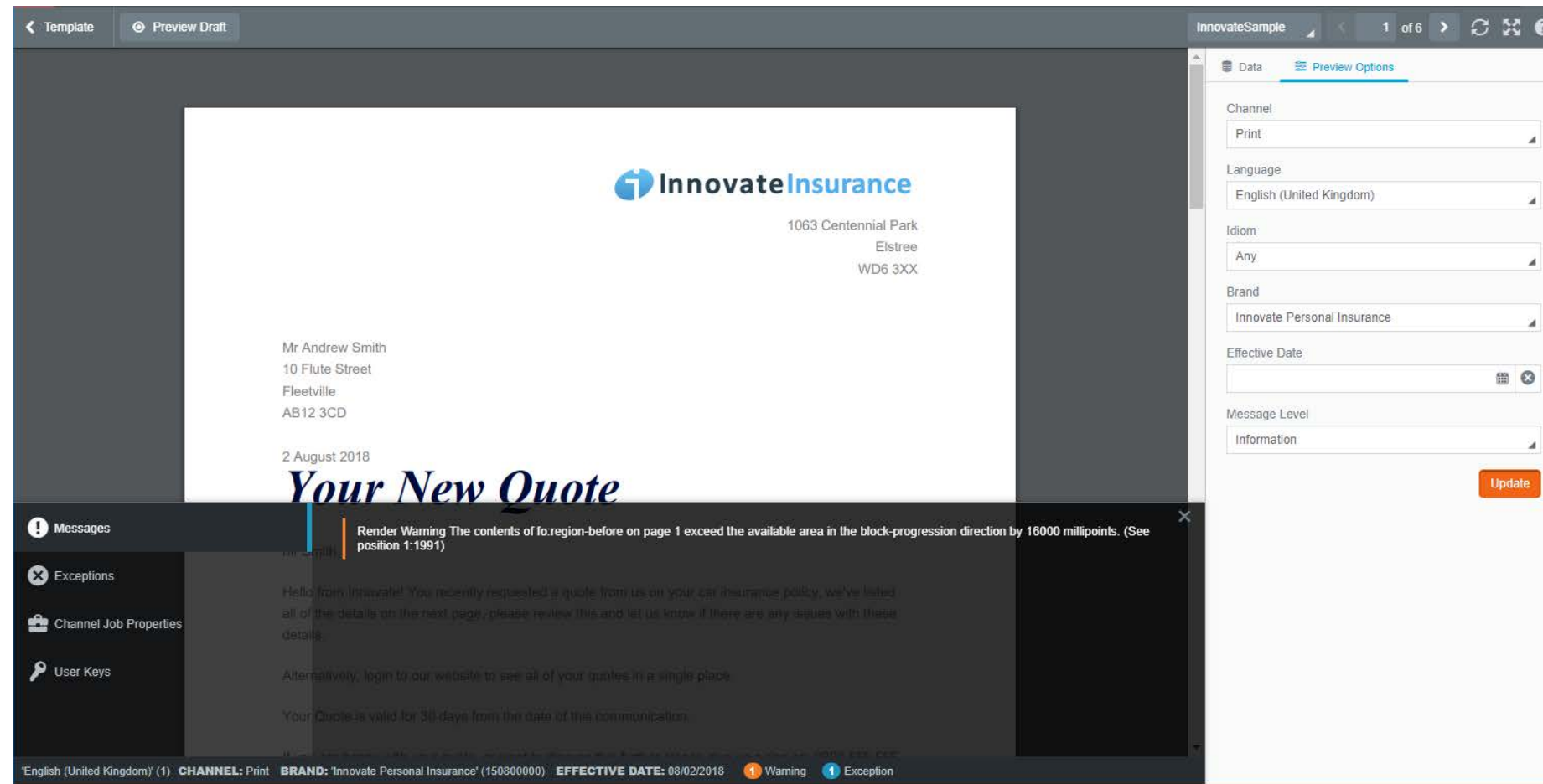
Suggestion Data Items are configured within the Data Modeller and can share the same Schema definition as Enumerations, allowing an Enumeration to be turned into a Suggestion for interactive use cases.

Editions Previewer

Template Editor's Preview functionality now allows users to control preview attributes while testing templates

The Messages panel has been redesigned to give a cleaner collapsed view, as well as providing enhanced information including CJP and User Keys

Message level can be defined to hide messages of a low importance

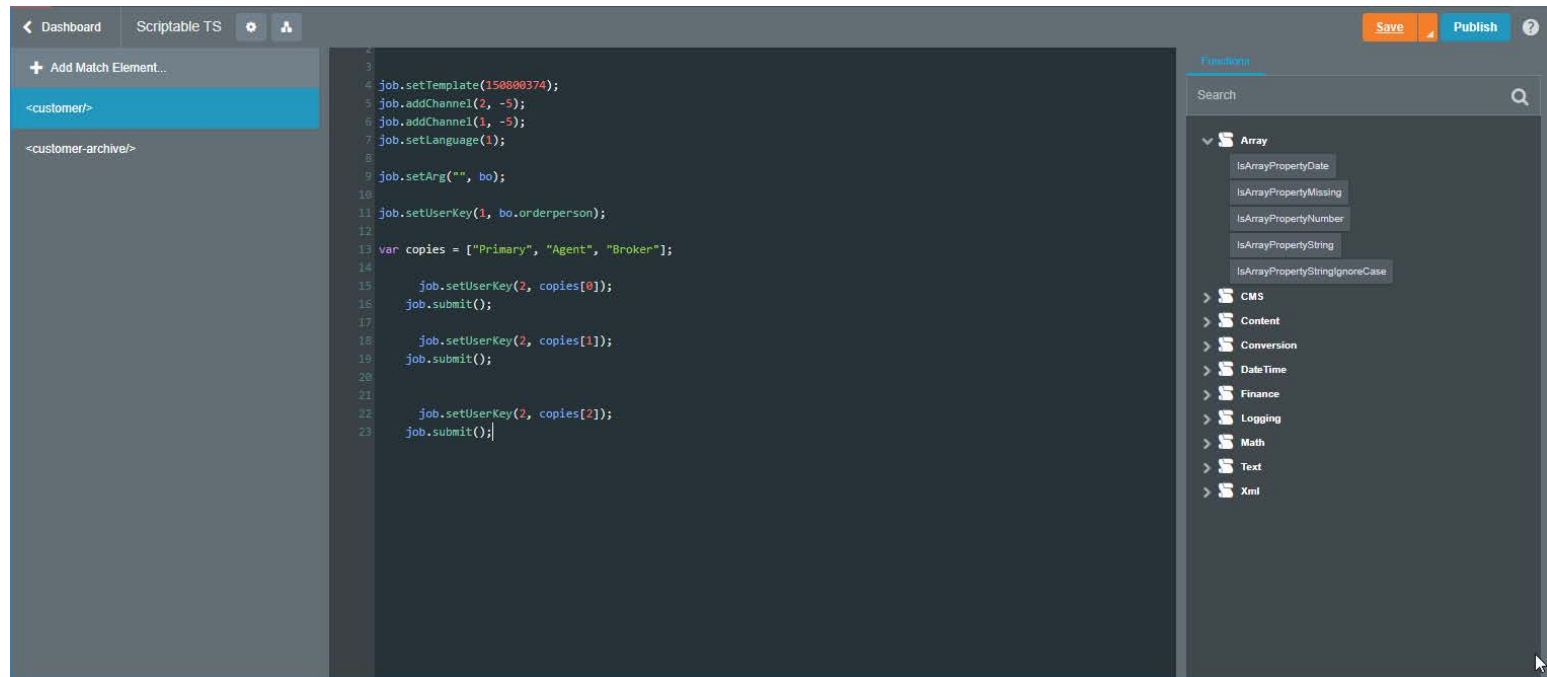


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Scriptable Template Selector Editor

Template Designer users can now create and edit Scriptable Template Selectors.

The new editor uses our text editor which is also used within Template Editor including the capabilities of the functions library and allows the user to define multiple scripts relating to each match element they wish to use for their Template Selector.



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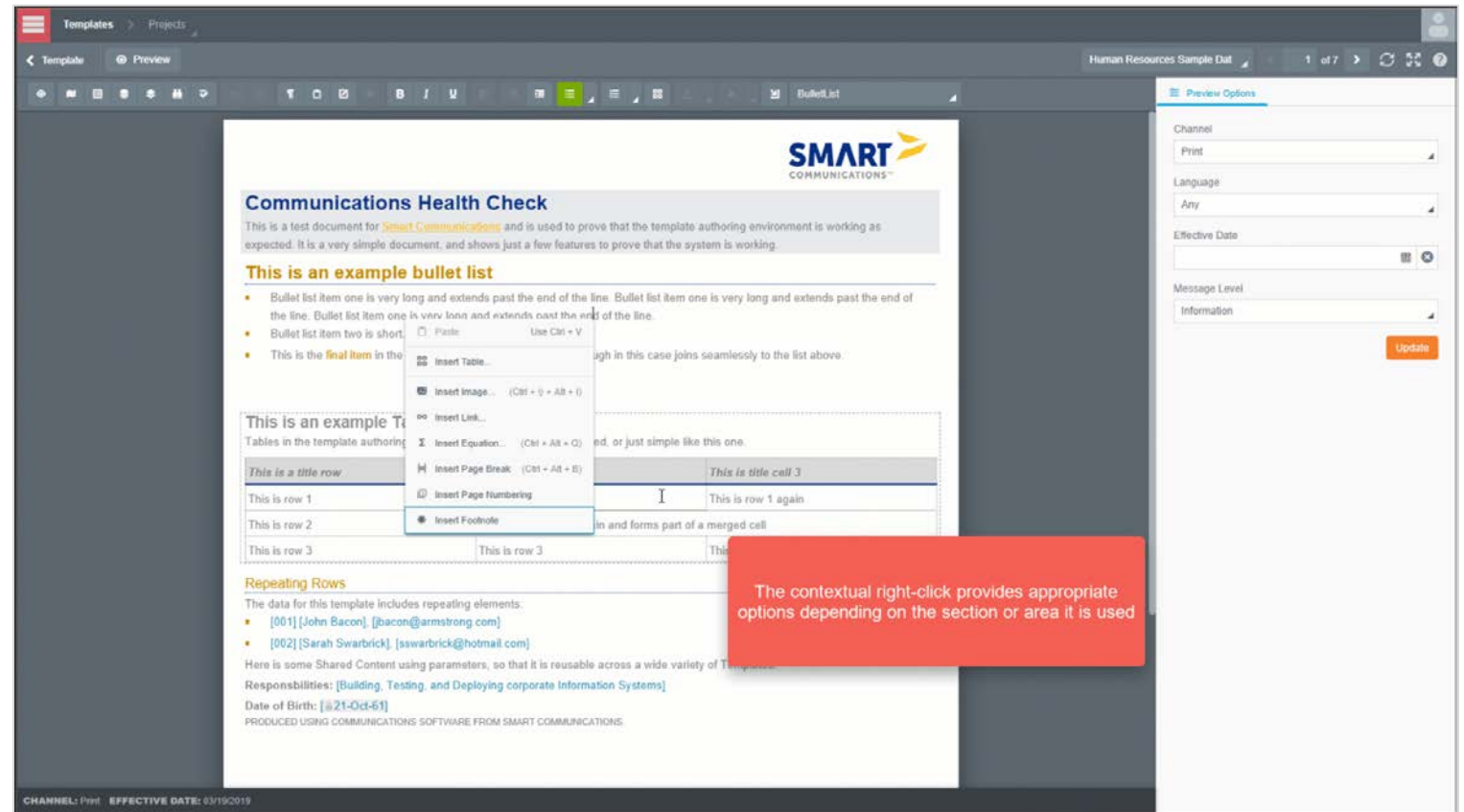
SC20 Release Highlights

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Draft Editor: Right-Click Menu

Draft Editor users may now interact with their Drafts by using the context sensitive right-click menu which presents relevant actions at the mouse pointer position.

This feature is very useful for working with tables, where context sensitive actions can reduce time spent editing.

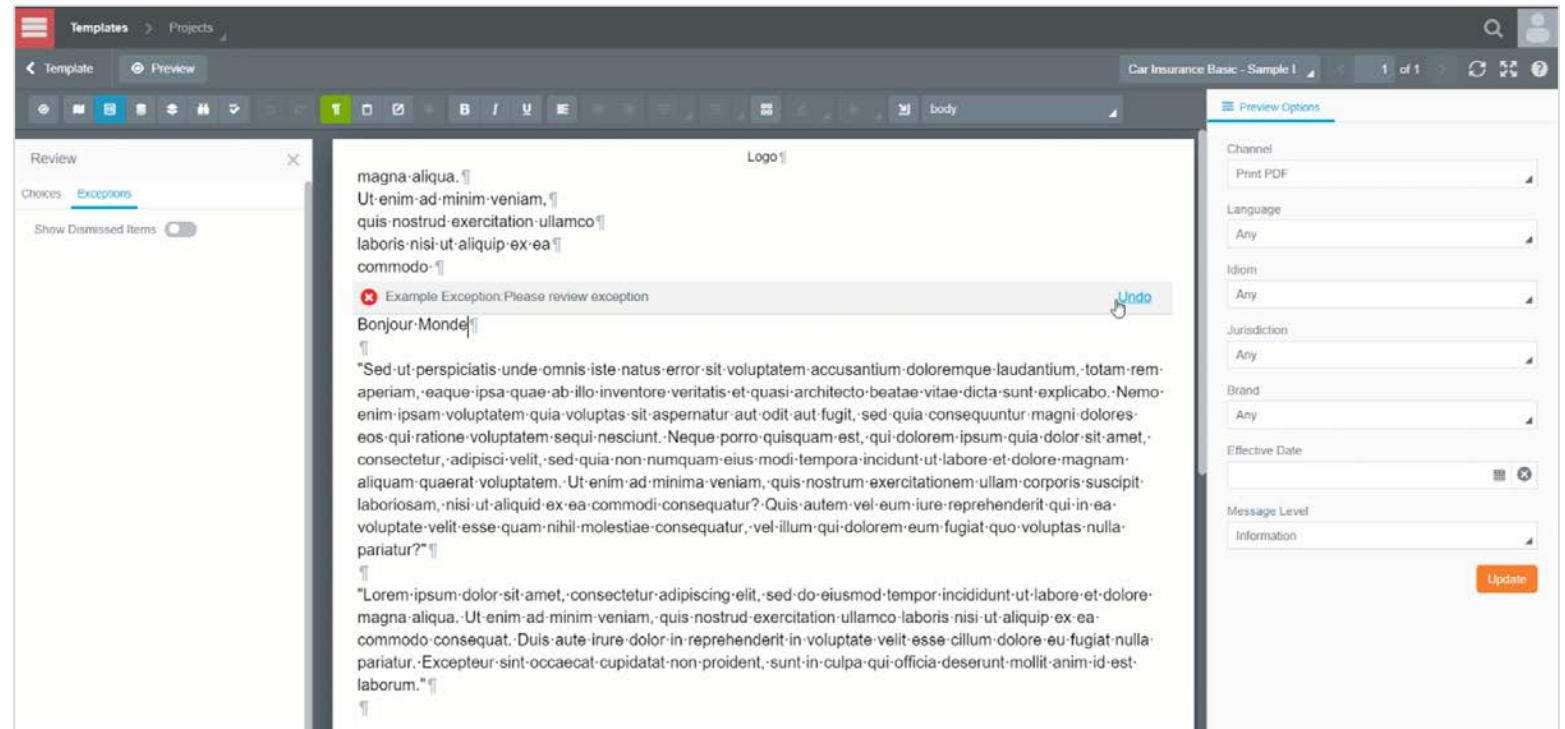


Draft Editor: Dismiss Exceptions

Users of Exceptions in the Draft Editor can now dismiss individual Exceptions.

This allows for users to keep track of their progress through the Exceptions within their Draft.

The underlying TML can be post-processed as part of the external user workflow ensuring that critical parts of the document are actioned by the user.



Data Item Change History

Improved representation of document edit history—previously updates were recorded as deletions and insertions.

All changes to a data item are now wrapped inside the same change element.

This improves the Draft as a tool for data capture and also facilitates much more robust data extraction.

The screenshot displays the Smart Communications Draft interface. The main document area shows a draft titled 'Insurance Document' with a 'Table of Contents' section. The 'Review' sidebar on the left lists changes, including '[LondonParis]'. A red callout box on the right states: 'All change history is tracked within the same change element'.

Table of Contents:

Insurance Document

This is a test document for **Smart Communications** and used to prove that the template authoring environment is working as expected. It is a very simple document, and shows a few features to prove that the system is working.

This person is based in **[LondonParis]**

This is an example of a Bullet List

- This is the country: **[UK]**
- This is a data item: **[General Insurance Document]**
- This is the **final item** in the list—it's actually a separate list, and depending on how the Styles are set up may be slightly spaced away from the preceding items.
- This is a data item: **[John]**

This is an example of a Table

Repeat of country: **[UK]**

Tables in the template authoring environment can be very sophisticated, or just simple list this one.

Name	Insurance Type	Licence
Peter Jones	Full	Full
John Smith		
Simon Peters	Full	

This is the country: **[UK]**

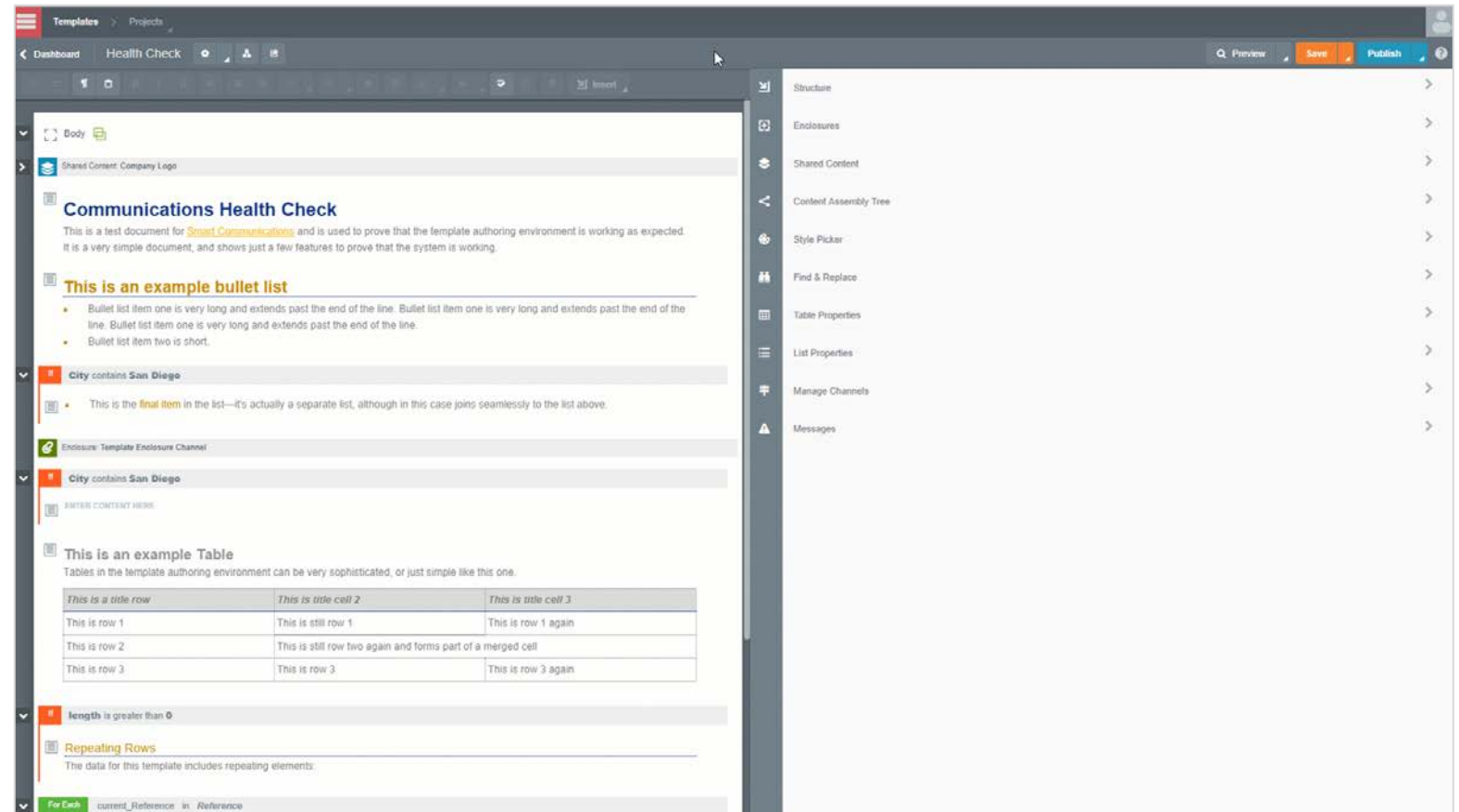
PRODUCED USING COMMUNICATIONS SOFTWARE FROM SMART COMMUNICATIONS.

NOTE: This change has resulted in updates to the Draft TML. Please refer to the product documentation for more information.

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Template Editor: Side Panel

The side panel in Template Editor has been redesigned using our *SmartUI* user interface design language. Users can work more efficiently with the new, cleaner Side Panel interface.



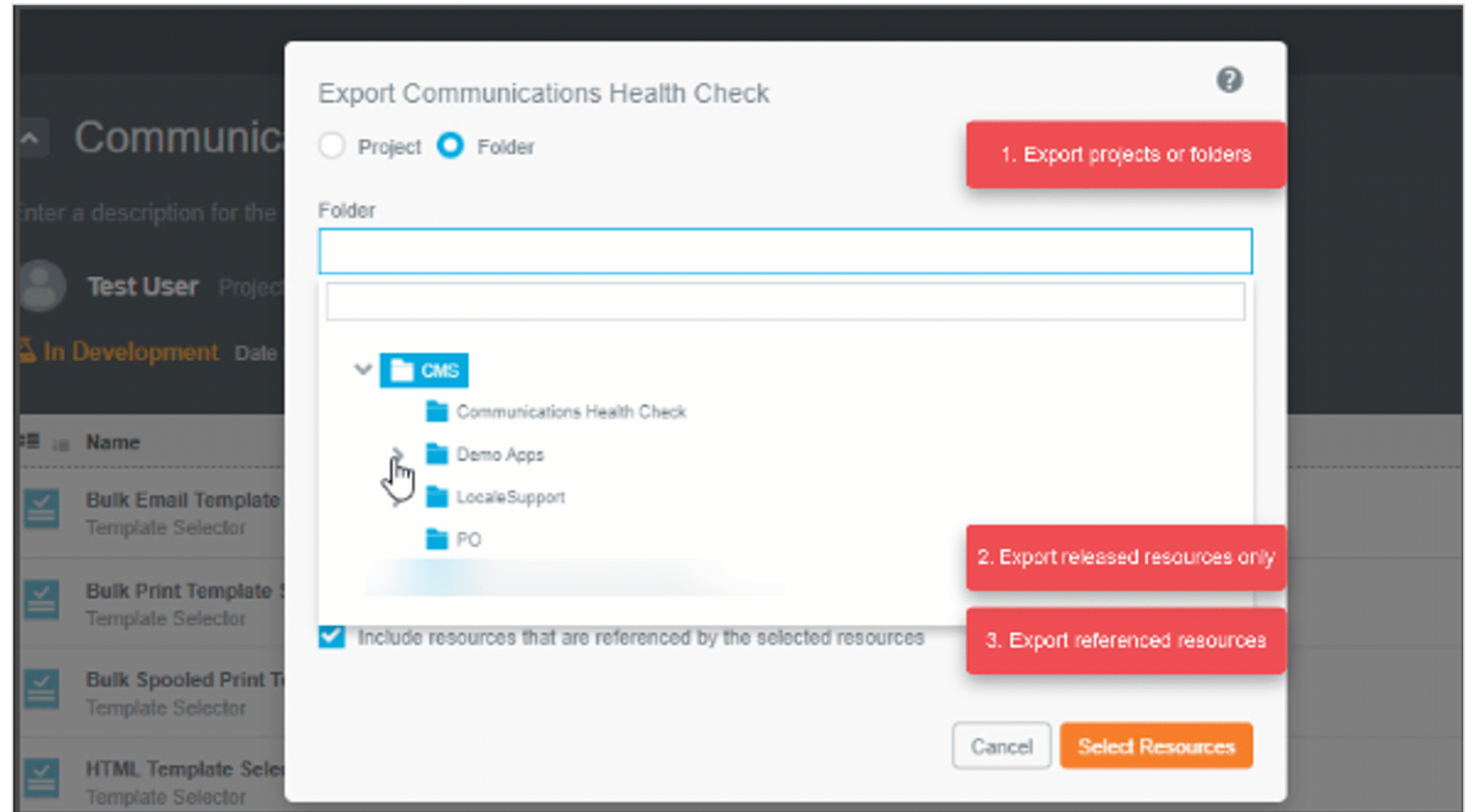
Improved Export and Import

Project Dashboard Export now supports folder export.

All Exports now have two new options:

- To select only released resource versions
- To select related resources

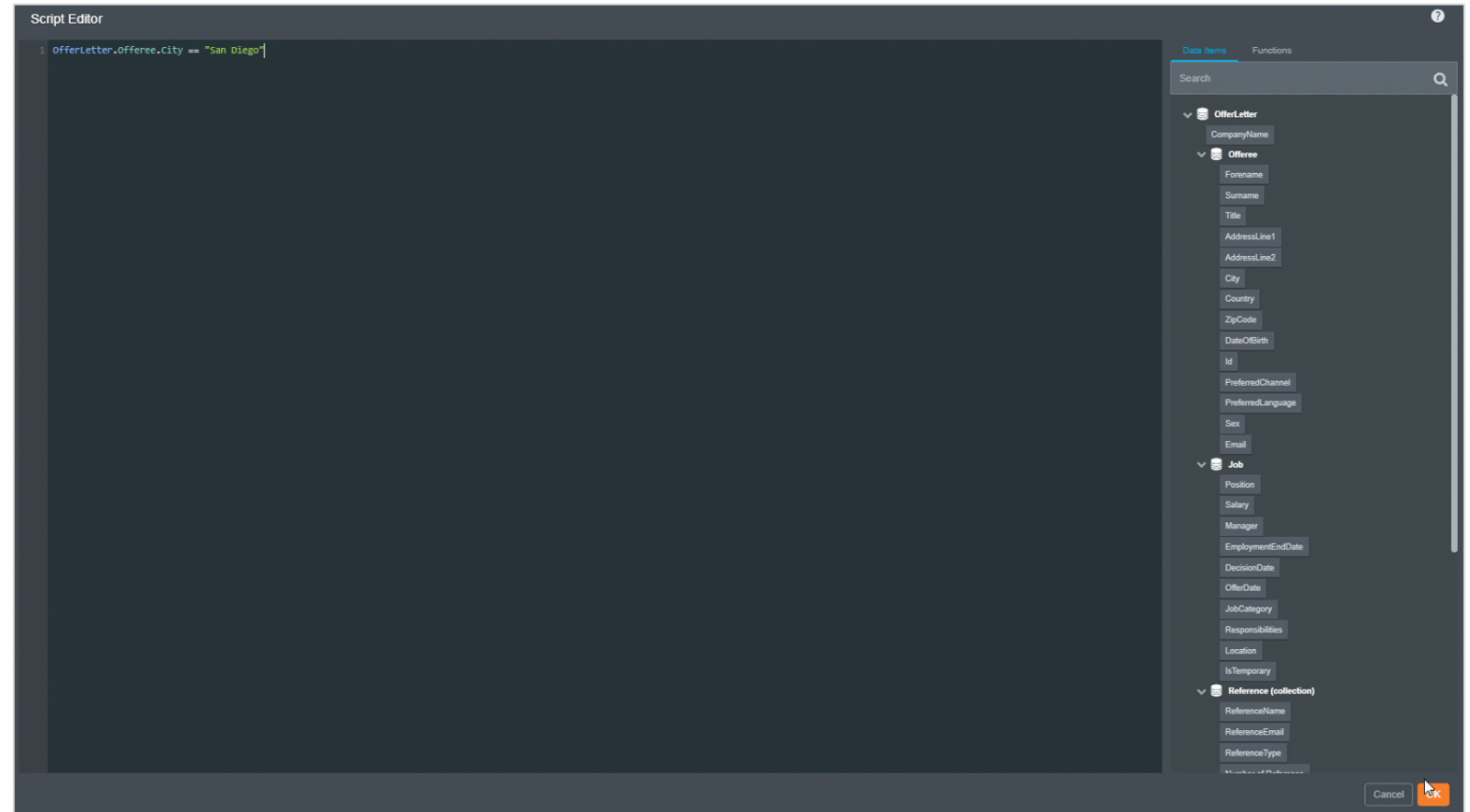
Export and Import dialogs have had their interfaces improved.



Template Editor: Advanced If Rules

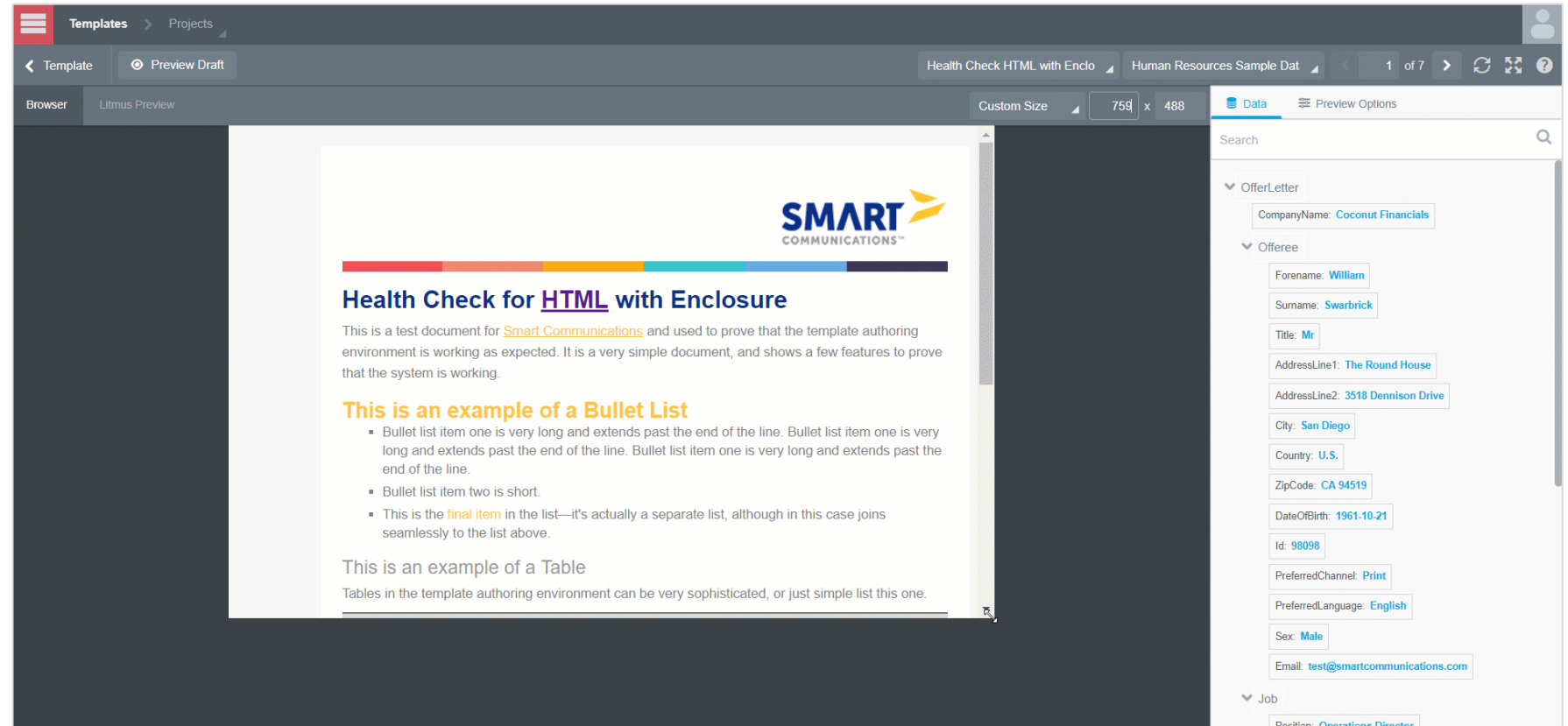
Users can now create Advanced If Rules within the Template Editor using JavaScript.

This allows users to utilize the SmartCOMM function library as well as any custom functions defined in their Document Script or Script Library.



HTML Preview Area Mouse Resize

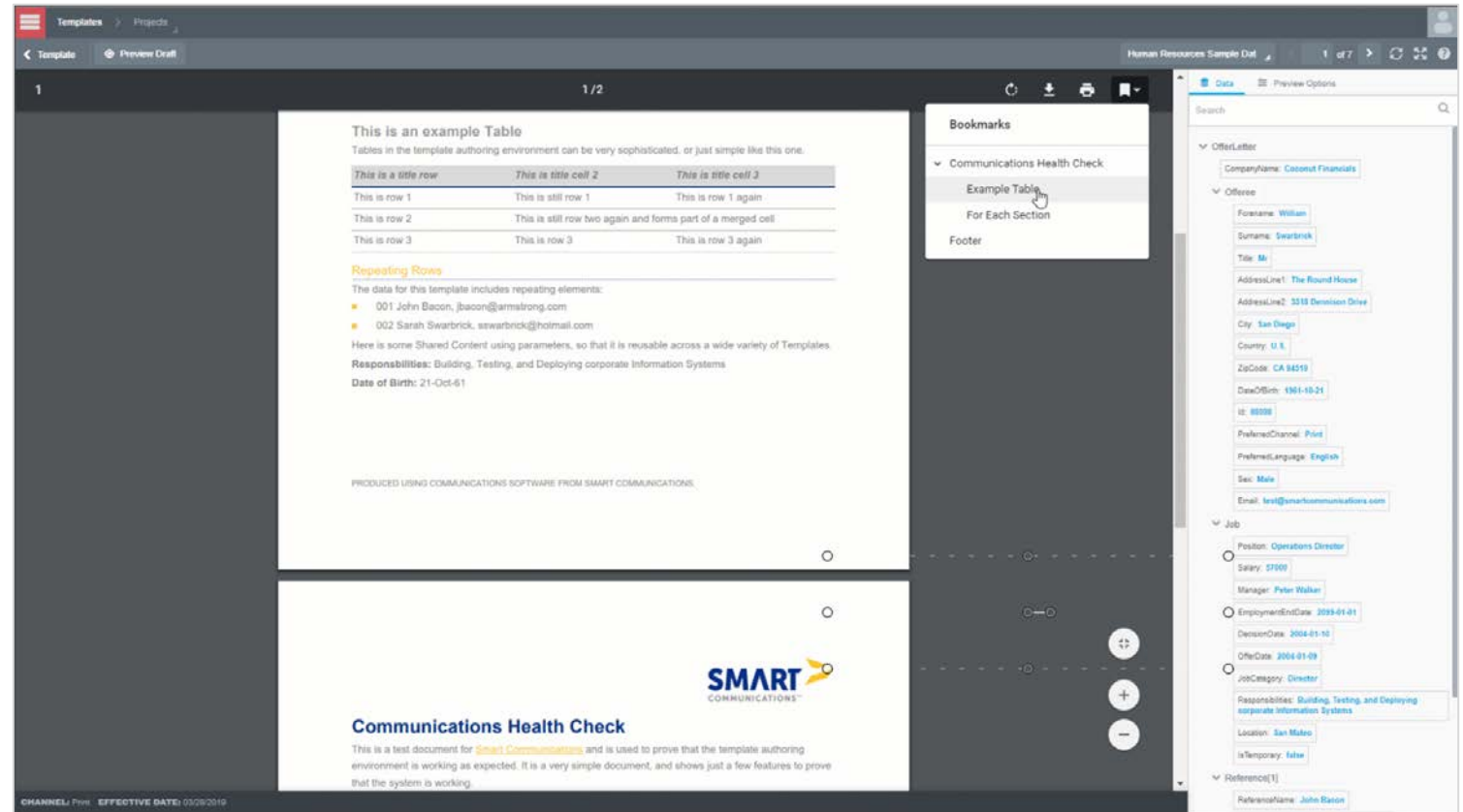
When previewing HTML templates, users are now able to use the mouse to resize the preview, allowing them to quickly mimic the screen resolution of any device.



Template Editor: Automated PDF Bookmarking

Template Editor users can configure their Templates to now automatically create Bookmarks in their PDF Output.

Bookmarks can be configured to be generated on individual Sections and Enclosures, or they can be applied to all Sections and Enclosures through the use of a Channel Job Property.



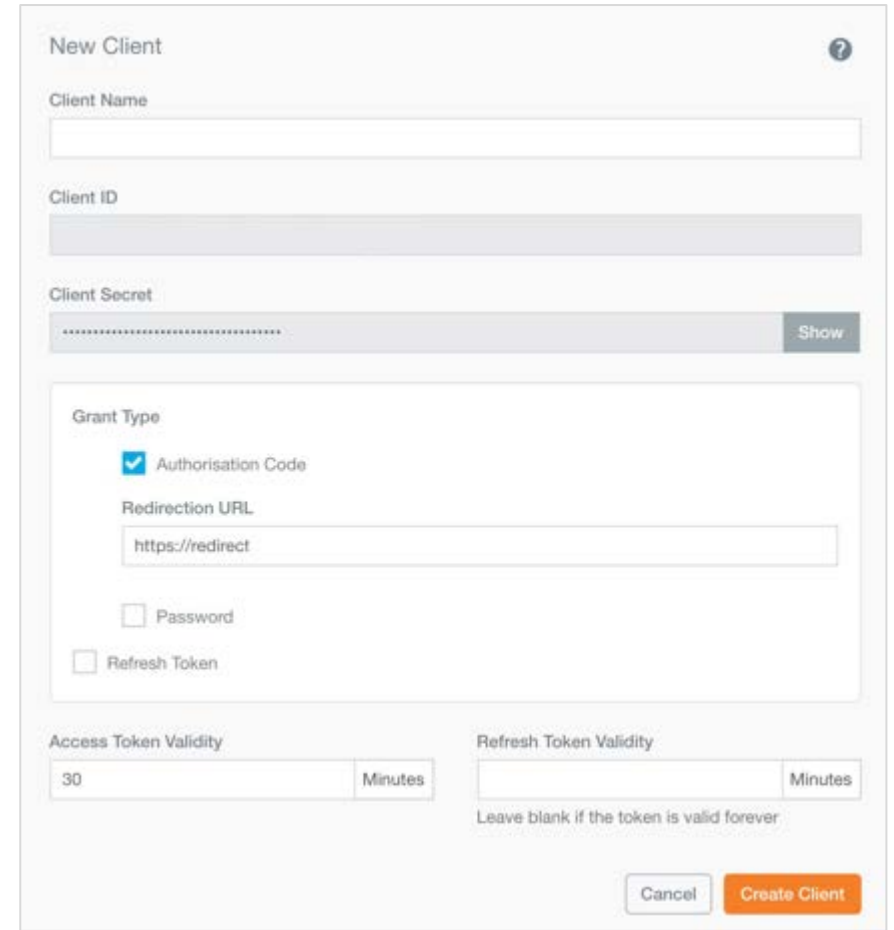
For Advanced Template Designer (ATD) users, this new functionality requires the latest SC20 ATD to be installed to preserve customized Section names.

Support for OAuth 2.0

All public APIs can be accessed in a secure fashion using the OAuth 2.0 authentication standard.

This will provide support for those customers who are routing requests through a Web Proxy that only supports OAuth 2.0 and third-party applications which only have OAuth 2.0 support.

OAuth 1.0 is still fully supported and in many cases is still preferred.



The image shows a 'New Client' form with the following fields and options:

- Client Name:** A text input field.
- Client ID:** A text input field.
- Client Secret:** A text input field with a 'Show' button to toggle visibility.
- Grant Type:** A section containing three radio button options:
 - ☒ Authorisation Code
 - ☐ Password
 - ☐ Refresh Token
- Redirection URL:** A text input field containing 'https://redirect'.
- Access Token Validity:** A section with a text input field containing '30' and a 'Minutes' label.
- Refresh Token Validity:** A section with a text input field and a 'Minutes' label. Below it, a note says 'Leave blank if the token is valid forever'.
- Buttons:** 'Cancel' and 'Create Client' buttons at the bottom right.

This new functionality will be made available in a patch release of the product.

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SmartCOMM Pure Cloud AWS

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2012: First Generation: Co-located Cloud

- Four global data centers including DR
- Fully multi-tenant for simplicity of maintenance
- On demand and interactive use cases only
- Full set of compliance standards
- Uses Smart Communications' hardware

2014: Second Generation: Hybrid Cloud Appliance

- **Software virtual appliance linked to our cloud**
- **Data pathways remain inside customer firewalls**
- **All CCM use cases supported**
- **Uses combination of Smart Communications' hardware and customer managed containers**
- **Unlimited volume capabilities**



2018: SmartCOMM Pure Cloud AWS

SMARTCOMM™



Elastic Scalability (up and down) based on peak communication needs with global data center presence: North America, APAC and Europe



Enterprise security, robust back-up and disaster recovery



Enterprise Scale for all Interactive, OnDemand and Batch use cases



Designed to run on AWS, and leverage the wider array of Amazon services including S3



Reduced TCO, access to innovation, and avoidance of lengthy upgrades

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Conversation History

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Conversation History



Listens and Stores



Tags Actioned
External Events



Analyses Events
During Content
Assembly



Aggregates Insights

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Conversation History Example

**Welcome Kit
Sent via
Email**

**No Response
After 48
Hours**

**Next
Communication
Readied**

**Conversation
History Polled**

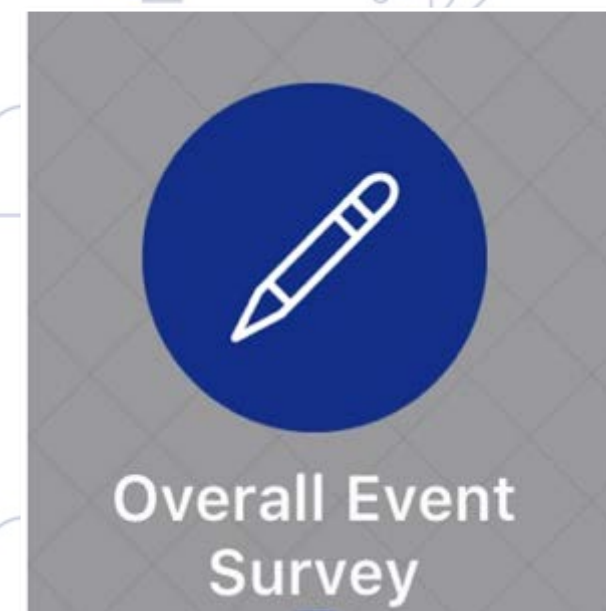
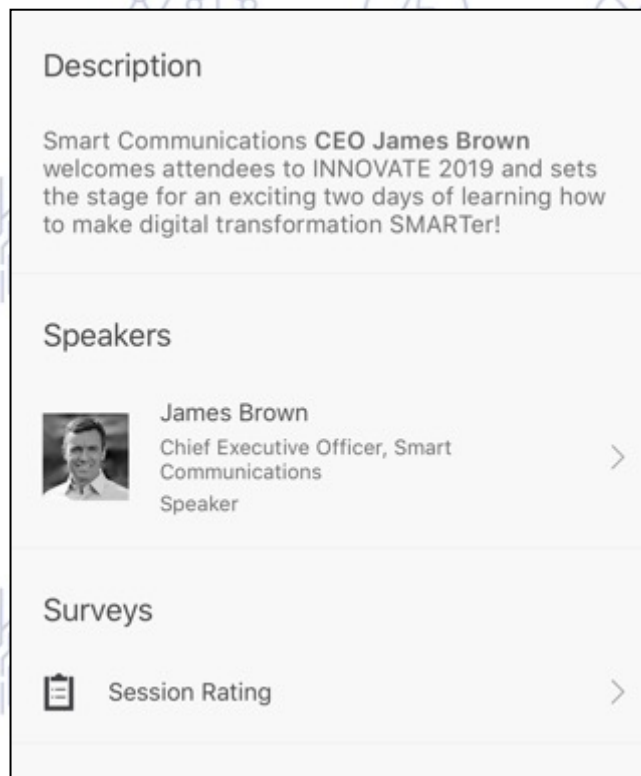
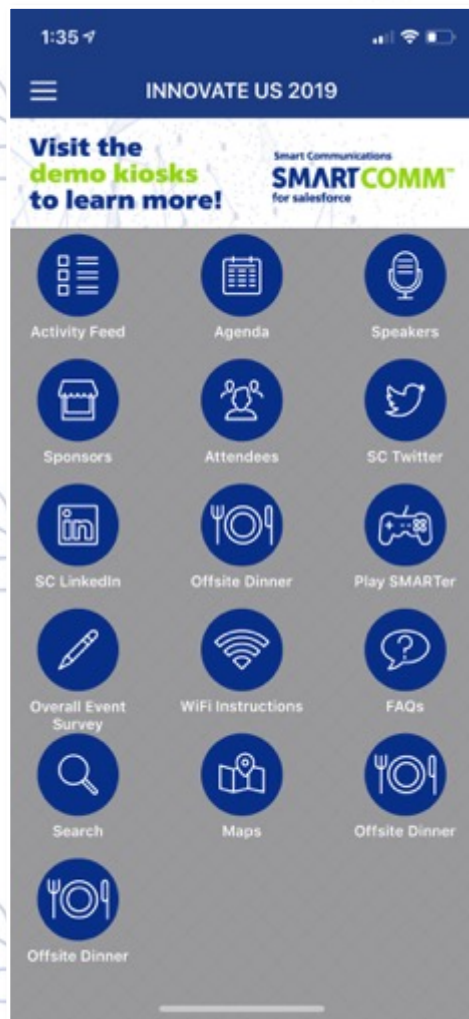
**Reminder
Email Sent
With Original
Welcome Kit**

**Customer
Engages**

Please Share Your Feedback!

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