Meet The Presenters

Jennifer Mowery
Product Manager,
PHEAA

Kate Farling
Customer Experience Strategist /
Product Owner, PHEAA

Hitesh Bhindi
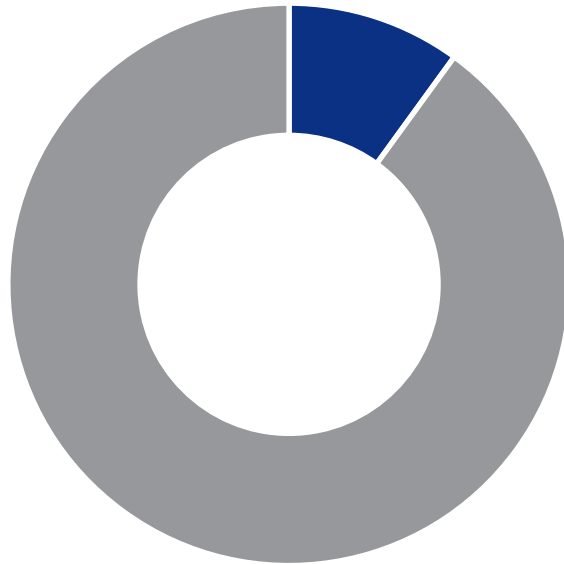VP of Global Professional Services,
Smart Communications

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Time Is Up!

85%

The Myth: Upgrading Legacy Systems

5-10% move to the latest release

40-50% stay on the release prior to the latest one

40-50% remain on even older releases

Source: Forrester Research

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Why Does This Matter?

32%

of enterprises say it is very costly to maintain and administrate their on-premise CCM system.[3]

Source: Keypoint Intelligence-InfoTrends Report, 2017

You May Be Falling Behind If Your Customer Communications Platform…

Is costly and difficult to maintain

Is only updated once every two years

Doesn't allow you to respond quickly to market changes

Still consumes significant IT resources

Requires weeks to make simple changes

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Why Does This Matter?

Legacy Document Generation System:

- Managed by IT
- Penalties for non-compliance
- Rules managed by programmers

Modernized Customer Communications:

- Rules managed by business users
- Automated approval workflows
- Connected to risk management

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Why Does This Matter?

Among enterprises, speed of production and execution is a **top 5 reason** for using cloud-based solutions for customer communications.[3]

Source: Keypoint Intelligence-InfoTrends Report, 2017

Why Cloud?

Improve Time to Market

Eliminate Increasing Maintenance Charges

Deployment Flexibility

Reduce IT Infrastructure Costs via the Cloud

Upgrade Process

Reduce Labor Costs

Evolving From Print to Digital

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The Before And After

Requires weeks to make simple changes

A multinational investment bank condensed their template change process from **160+ hours to 16 hours.**

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The Before And After

Is costly and difficult to maintain

A financial services company received total benefits of **$16.7 million** in three years—an **ROI of 260%**

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The Before And After

Doesn't allow you to respond quickly to market changes

A leading telecom provider reduced their onboarding process from **MONTHS** to **MINUTES** using Smart Communications

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How Can We Help You Move To The Cloud?

2019
INNOVATE
Digital Transformation Made **SMART**er

Our Professional Services (PS) team utilizes a repeatable methodology

1   Analysis

2   Project Planning

3   Execution

4   Moving Forward

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Are You Moving From NOW?

Discussion
Project goals
New features
New use cases

Requirements Analysis
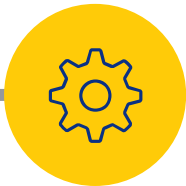Customer & PS completes questionnaire which documents current solution

Review
PS reviews Requirements Analysis with the Customer and finalizes the document

CMS Review
PS collects and reviews the Customer's CMS

Identify Changes
PS creates a Gap Analysis document which highlights areas of change

Proposal Discussion
PS creates a Proposal that forms the basis for a future Statement of Work (SOW)

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Planning: Project Phases

The Upgrade Proposal is usually broken into the following sections:

PHASE 01	PHASE 02	PHASE 03	PHASE 04	PHASE 05	PHASE 06
SmartCOMM™ Resource Migration	Security Migration	SmartCOMM™ Appliance Deployment & Configuration	Host System Integration	Draft Editor Integration	Testing, Training & Mentoring

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Planning For NOW To SmartCOMM™

Required Project Roles

❖ Project Manager to oversee project and ensure on-time and on-budget delivery

❖ System Administrator for your NOW installation

❖ Developer to change integration code

❖ QA Team to run regression testing and ensure communications look as expected

❖ Template Authors to update templates if issues are found during testing
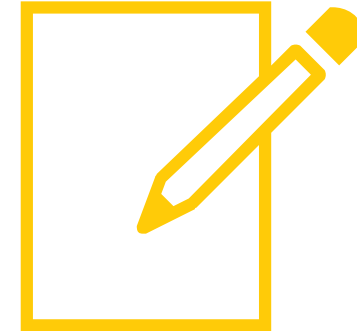
Our PS team will collaborate with you to decide which tasks you want us to lead.

Once agreed, the Statement of Work is finalized.

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Before We Move On
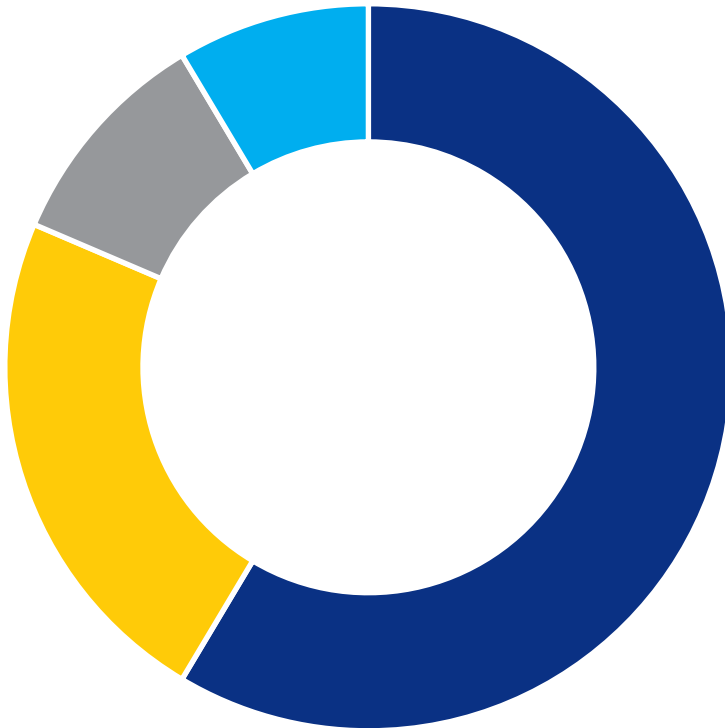
1 Ask us how we can help you with your migration

2 Analysis and planning saves cost in the long run

3 Focus on the benefits of moving to the Cloud

4 We have done this **MANY** times

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Who is PHEAA ?

A national provider of student financial aid services, currently serving 10 million customers and thousands of schools through its loan guaranty, loan servicing, financial aid processing, outreach, and other student aid programs

PHEAA's earnings are used to support its public service mission and to pay its operating costs, including administration of the Pennsylvania State Grant and other state-funded student aid programs

PHEAA continues to devote its energy, resources, and imagination to developing innovative ways to ease the financial burden of higher education for students, families, schools, and taxpayers

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PHEAA Brands

Avereo

Offering Digital Technology Solutions to enable PHEAA's AES and FedLoan Servicing brands

Leverage established and new partnerships with world-class technology providers to deliver software-as-a-service solutions

American Education Services

Guaranteeing and servicing a variety of Federal Family Education Loan Program (FFELP) and private (alternative) student loan products for approximately 100 lending partners throughout the nation

FedLoan Servicing

Established to support the U.S. Department of Education's ability to service student loans owned by the federal government

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The Need for a Digital Transformation

PHEAA identified 4 main business needs to transform our mainframe based Customer Communication Management system to an enterprise level solution

1 **Scale**

Omni-channel **4**

Need for Transformation

2 **User Experience**

Compliance **3**
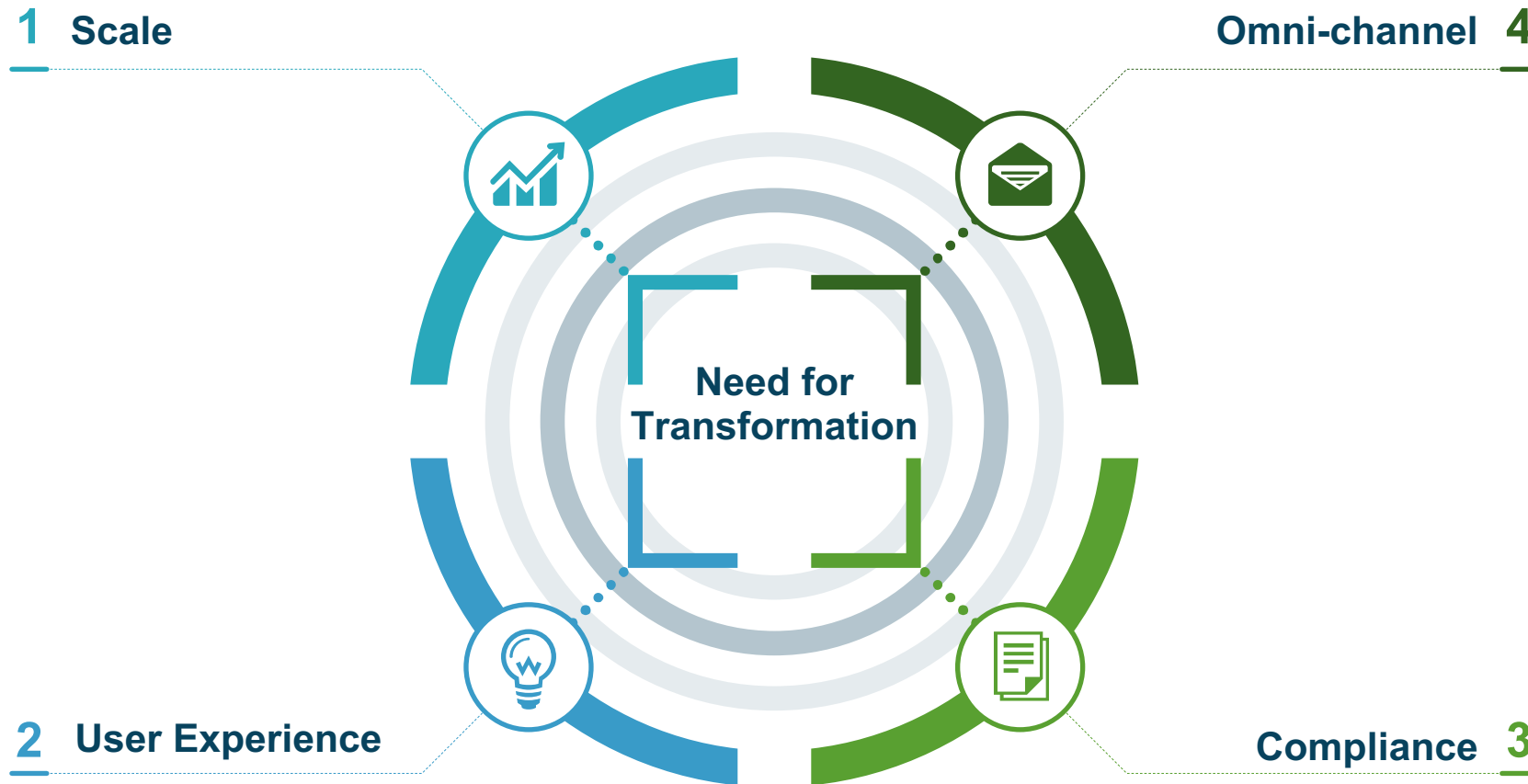
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The Need for a Digital Transformation

1 Scale

Our legacy systems did not have the throughput capabilities needed to achieve our business growth goals.

- 600M comms sent in 2018
- Scale to 35M customers = 2B comms annually

Omni-channel 4

Need for Transformation

2 User Experience

Compliance 3

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The Need for a Digital Transformation

1 Scale

2 User Experience

- Legacy systems required expensive resources with in depth technical knowledge to maintain content through outdated green screens
- Lack of easy-to-use shared content and branding logic resulted in a portfolio of approximately 5000 individual letter templates
- Requesting personalized communications by the end user was complex, error prone and did not provide a clear preview of the final communication prior to generation

Omni-channel 4

Compliance 3

Need for Transformation

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The Need for a Digital Transformation

1 Scale

Omni-channel 4

Legacy systems had very limited capabilities to pivot to preferred customer channels and digital experiences.

Need for Transformation

2 User Experience

Compliance 3

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The Need for a Digital Transformation

1 Scale

Omni-channel 4

Compliance 3

Need for Transformation

- Section 508 impacts federal agencies and any company that does business with a federal agency. This includes private contractors, the financial industry, healthcare, many legal organizations, and others.
- PDFs require 508 remediation as they are not accessible by screen readers and our legacy systems did not accommodate

2 User Experience
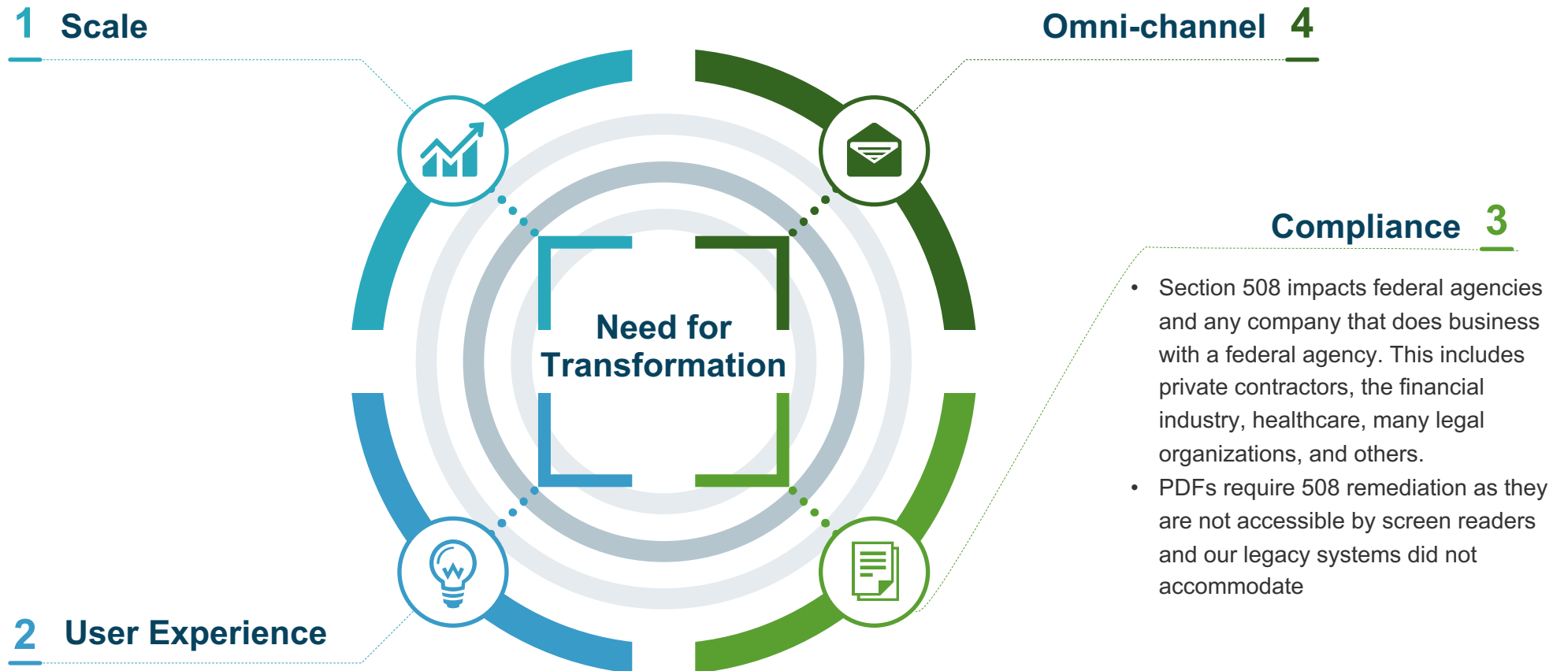
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Transformation

Legacy to NOW

Transformation to Thunderhead NOW began in 2014 to meet the 508 Compliance requirements to continue contracting with the Federal Government

2014

2016

Approximately 2500 templates were migrated and built into SC through collaboration between PHEAA and SC

NOW to SmartCOMM

While NOW met our Compliance requirements, it did not provide the scalability needed. SmartCOMM provided scalability AND information security with the hybrid cloud solution, while providing other important features like omni-channel communications, flexible branding and personalization

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Gains from Digital Transformation

Scalability

We are now better positioned to grow our business and still communicate with our customers effectively and efficiently

Omni-channel

User Experience

Compliance

Cost Savings

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Gains from Digital Transformation

Scalability

Omni-channel

User Experience

- Ease of maintaining content – it no longer requires in-depth technical knowledge for our resources to maintain the content. SC makes it as simple as using a familiar word processor to make updates.
- Rationalization – flexible branding and conditional content to reduce time to market of updates that may be needed across a population of communications and have decreased the overall portfolio of individual templates (from approximately 5000 to approximately 2500)
- Draft Editor – allows our end users to easily and accurately provide personalized communications

Compliance

Cost Savings

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Gains from Digital Transformation

Scalability

Omni-channel

Real time emails
Email/letter combos
Letters System (on-line or batch)
Interactive

.

User Experience

Compliance

Cost Savings

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Gains from Digital Transformation

Scalability

Omni-channel

User Experience

Compliance

SmartCOMM allows us to produce those compliant PDFs with ease by creating and using shared styles

Cost Savings

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Gains from Digital Transformation

Scalability

Omni-channel

User Experience

Compliance

Cost Savings

- Lowered total cost of ownership
- Cut maintenance costs in HALF due to rationalization

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Lessons Learned

Take an Iterative Approach

On-Site Workshops are Most Effective

Find Creative Solutions

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Comm Platform and SmartCOMM – Our Future State

1

Design

Include Library

Provides the content writer/requester with a library of the available data elements that can be included in communications

2

Build

SmartCOMM

Tool for creating templates that house the content and formatting for communications

3

Configure

Comm Config

Its where a developer links customer data elements to the communication and sets configuration for delivery

4

Send

Comm Request

Green screen replacement to request, view, and update letters in real-time. Loosely coupled to SC Draft Editor

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