

7 ways to optimize your omnichannel customer communications

...without leaving Salesforce®!



Use business data
to drive Customer
Experience

Enable business
users to create
communications

Improve the quality
of your customer
interactions

Accelerate
time to
market

Automate and
personalize customer
communications

Take advantage
of the close
integration

Measure
the customer
impact

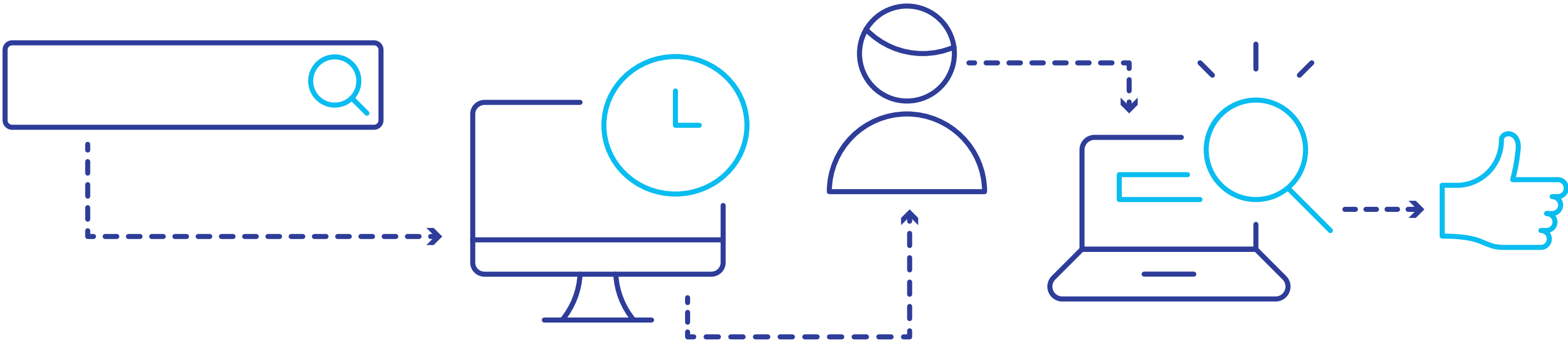
Introduction

In this ebook you will discover seven ways to help you improve your customer communications by integrating OpenText™ Exstream to Salesforce®.

The digital marketplace has expanded opportunities—along with customer expectations. Today’s customers expect personalized journeys that address their needs. Companies know that successful and engaging customer experience

is the responsibility of all employees. Sharing personalized and consistent content with customers is key to improve customer satisfaction, maintaining brand consistency and ensuring a quick return on investment.

However, with an ever-growing number of communication channels, and vast amounts of content managed by multiple teams, maintaining quality and consistency can be a real challenge.



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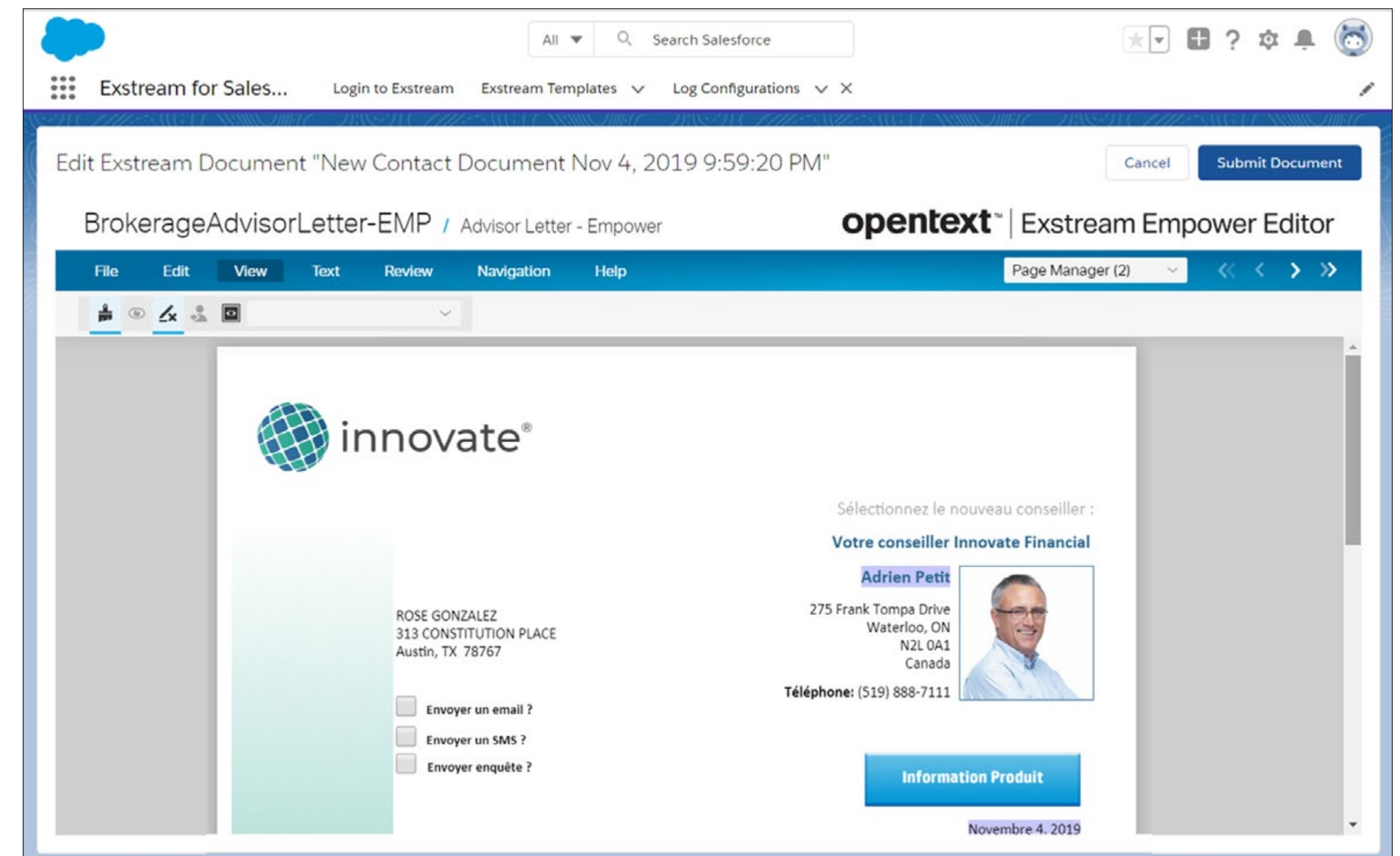
Use business data to drive Customer Experience

Wherever customers are in their journey the communication with them must be smooth and controlled, to make them feel that the company speaks with a single voice.

CRM systems such as Salesforce provide structured data around customers. Commerce platforms provide structured data around transactions. Neither offers personalized communication capabilities. Exstream for Salesforce streamlines, automates and integrates the customer experience. Creating customer correspondence directly within their CRM system, users can access, revise, repurpose and personalize content faster and with less effort.

OpenText™ Exstream™ for Salesforce® is a document generation solution that helps organizations deliver consistent, compliant, communications—anytime and anywhere—to create remarkable customer experiences. Exstream for Salesforce speeds document creation and increases user productivity while eliminating virtually all risk to the brand and business.

The benefits: Consistent, omnichannel communications adapted to customers' preferences, error-free and increased user productivity.



Directly access document templates in Salesforce to personalize correspondence

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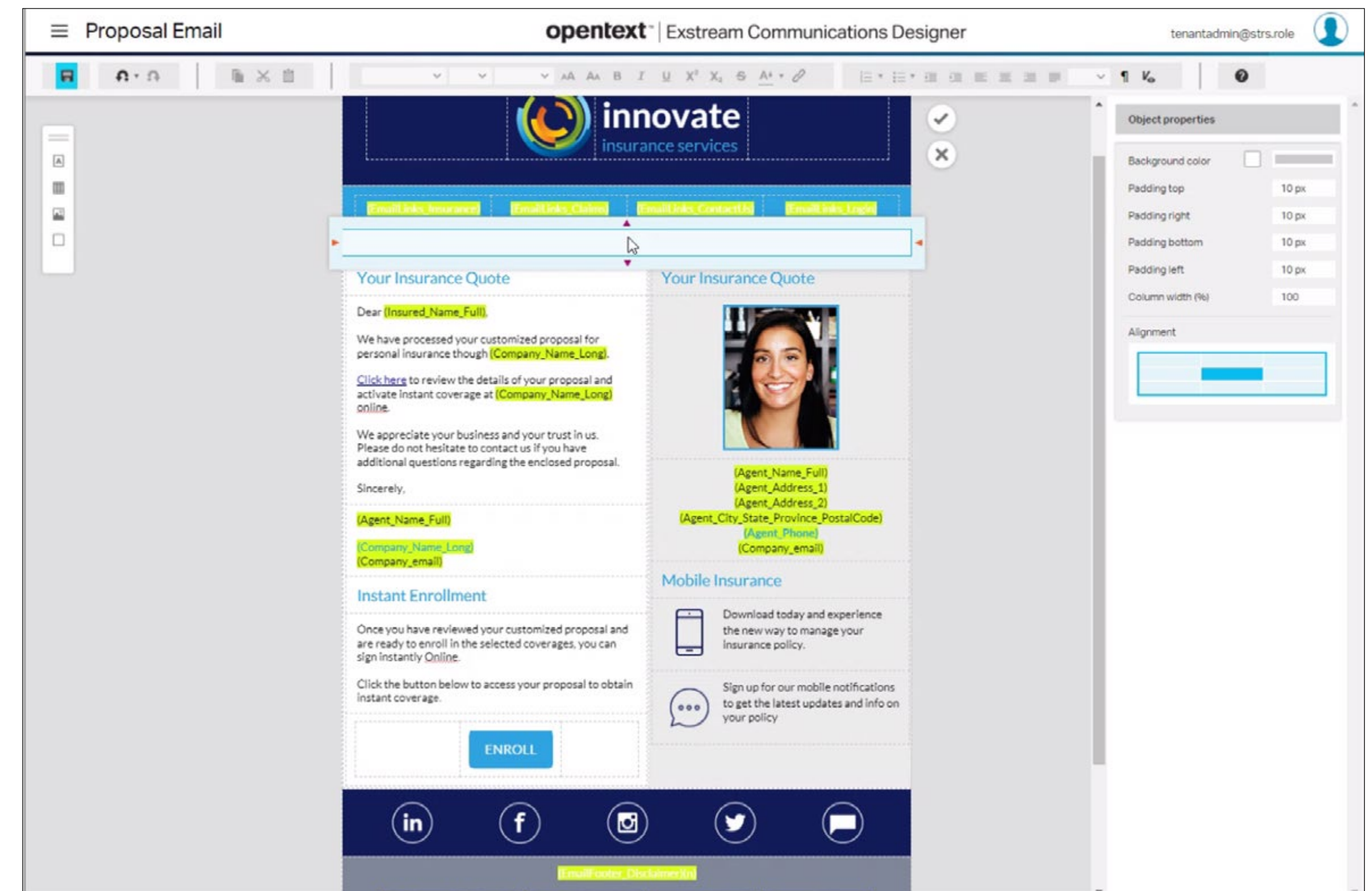
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Enable business users to create communications

Without a centralized solution, many organizations generate diverse communications that don't comply with governance and branding. This has a direct impact on productivity and profitability. Many businesses still produce their communications outside of controlled business workflows. Personalization is managed through copy and paste of data from business applications to solutions, such as Microsoft Word. This introduces risk in terms of both accuracy and compliance.

Exstream for Salesforce automates and re-purposes dynamic templates to save time, money and the need for technical resources. It enables business users to tailor, edit and deliver omnichannel communications, including quotes, proposals, contracts or service documents. They can access the template library and therefore reduce the time spent developing complex document templates.

OpenText Exstream for Salesforce is completely integrated within Salesforce and allows business users to increase customer engagement, drive revenue and improve brand loyalty and brand consistency, through relevant, personalized and omnichannel communications.



OpenText Exstream for Salesforce enables business users to create dynamic documents

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Improve the quality of your customer interactions

According to Gartner, customer experience will be the new battleground for 81% of companies. Its potentially more important than price, product quality or brand reputation.

Customers today want to have permanent access to information through the channel and device (phone, tablet, smartwatch, etc.) of their choice. To meet their expectations and guarantee the quality of the interactions, communications must be natively omnichannel. The dialogue must be uninterrupted and consistent through all channels: e-mails, websites mobile applications and pdf documents.

Built for omnichannel customer communications, Exstream leverages the data and content that exists within an organization. Exstream delivers highly personalized, engaging customer experiences on the customer's preferred digital and print channels, screen sizes and devices.



OpenText Exstream enables an identical experience, at each contact point on the customer journey

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Accelerate time to market

Time to market is a key indicator of a company's process efficiency.

Many organizations lack agility and use expensive resources in time-consuming tasks either because of technical limitations, or an inadequate information management process.

By empowering the marketing, sales and customer service teams to create, modify and deliver communications, Exstream allows you to reach out to customers faster. Communications can be sent through their preferred channels and may help increase business metrics such as click-through rates.

OpenText Exstream allows users to automate and re-purpose dynamic templates and documents to save time, money and the need for technical resources. Businesses have the autonomy to efficiently create and modify communications. They can generate messages that are automatically integrated into transactional documents according to predefined rules. This translates into time savings, cost reductions and faster time to market.



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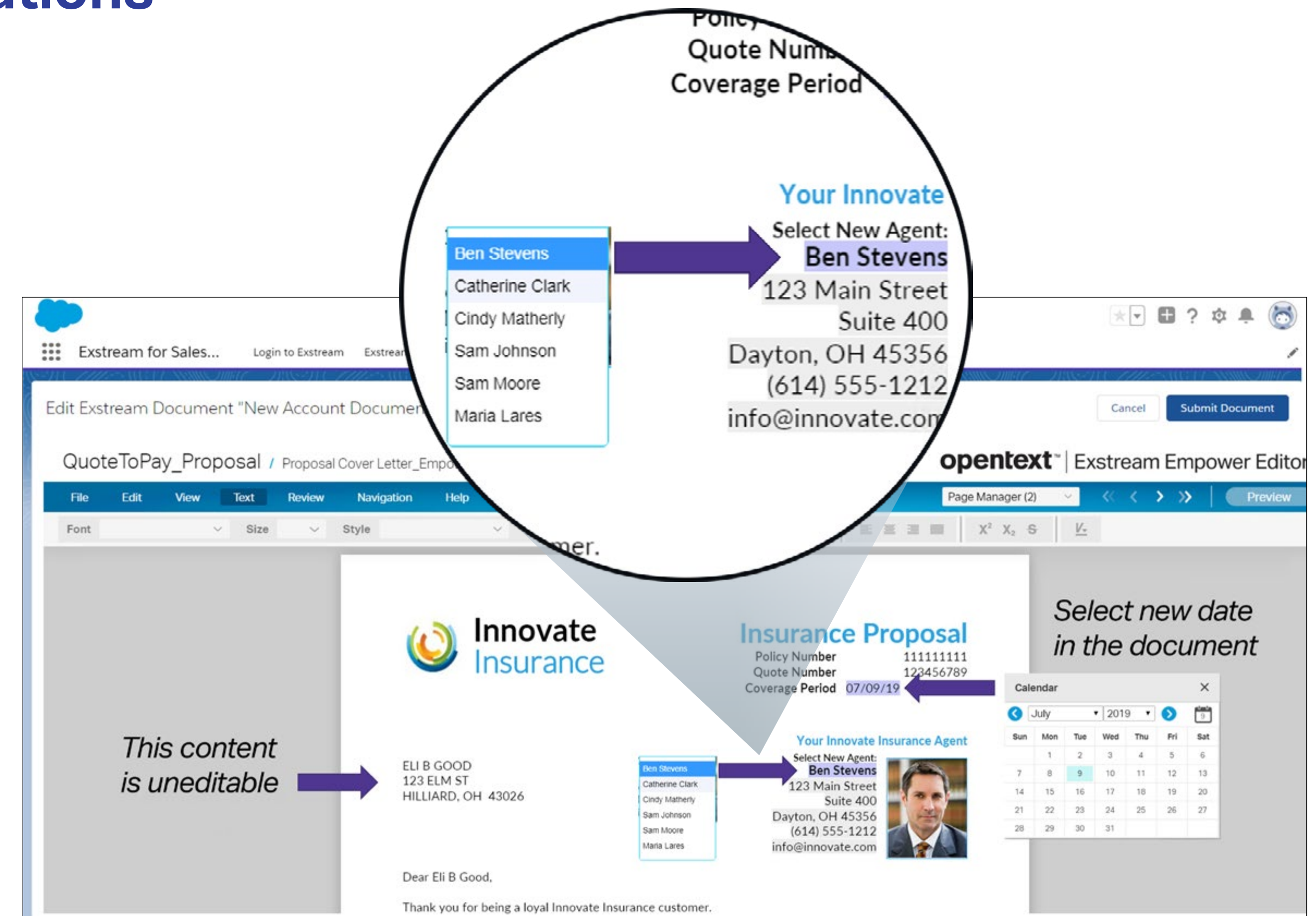
Measure the customer impact

Automate and personalize customer communications

Many Salesforce users are limited by the type of documents they can send to their customers. They often create them in word processing solutions outside a defined process, which is prone to errors and non-compliance risks.

OpenText Exstream for Salesforce provides users with a controlled editing experience; they access approved templates, in which they can only edit specific areas, depending on their rights. Communications can also go through an approval process. These features allow organisations to secure communications while benefiting from process automation.

Whether producing a single customer service email or a complex quote, business users and customer-facing agents benefit from a solution that can rapidly synthesize relevant business data and content into compelling written communications—all from within their familiar CRM environment.



Exstream offers a controlled autonomy, allowing business users to edit only specific areas and fields

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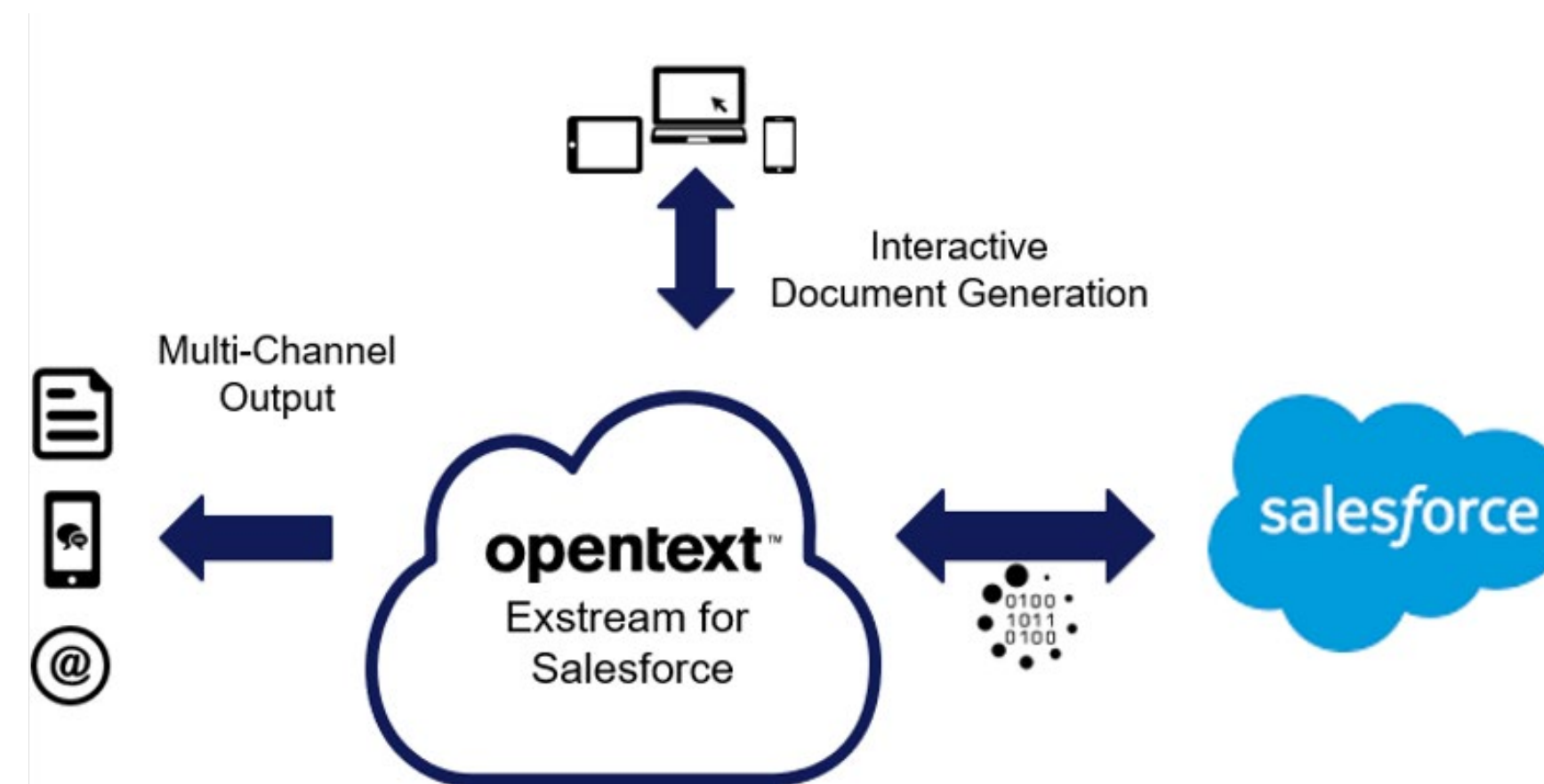
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Take advantage of the close integration

Business users want to access the document templates of their choice, at the latest version, directly within their familiar CRM environment. Also, they expect the customer communication management solution to be intuitive and user friendly, to quickly create and edit new communications.

Exstream for Salesforce is fully integrated with the CRM system. It leverages the existing data in Salesforce and other systems to generate compelling documents faster. Users don't need to exit their familiar environment to create documents. The solution is user friendly and intuitive to allow them to generate compliant communications in a few minutes.

The integration with Salesforce offers user fluidity in daily operations, which results in increased productivity, reduced risks of errors, reduced costs and better exchange tracking.



OpenText Exstream is directly connected to Salesforce to create and send customer communications

“Now that we can implement changes ourselves, typically in less than an hour, we can truly benefit from being able to keep our customers informed. OpenText Exstream has reduced the cost of template maintenance by 45 percent and has made us much more agile.”

Phil Rees
Former Multichannel Platform Leader
Premium Credit Limited

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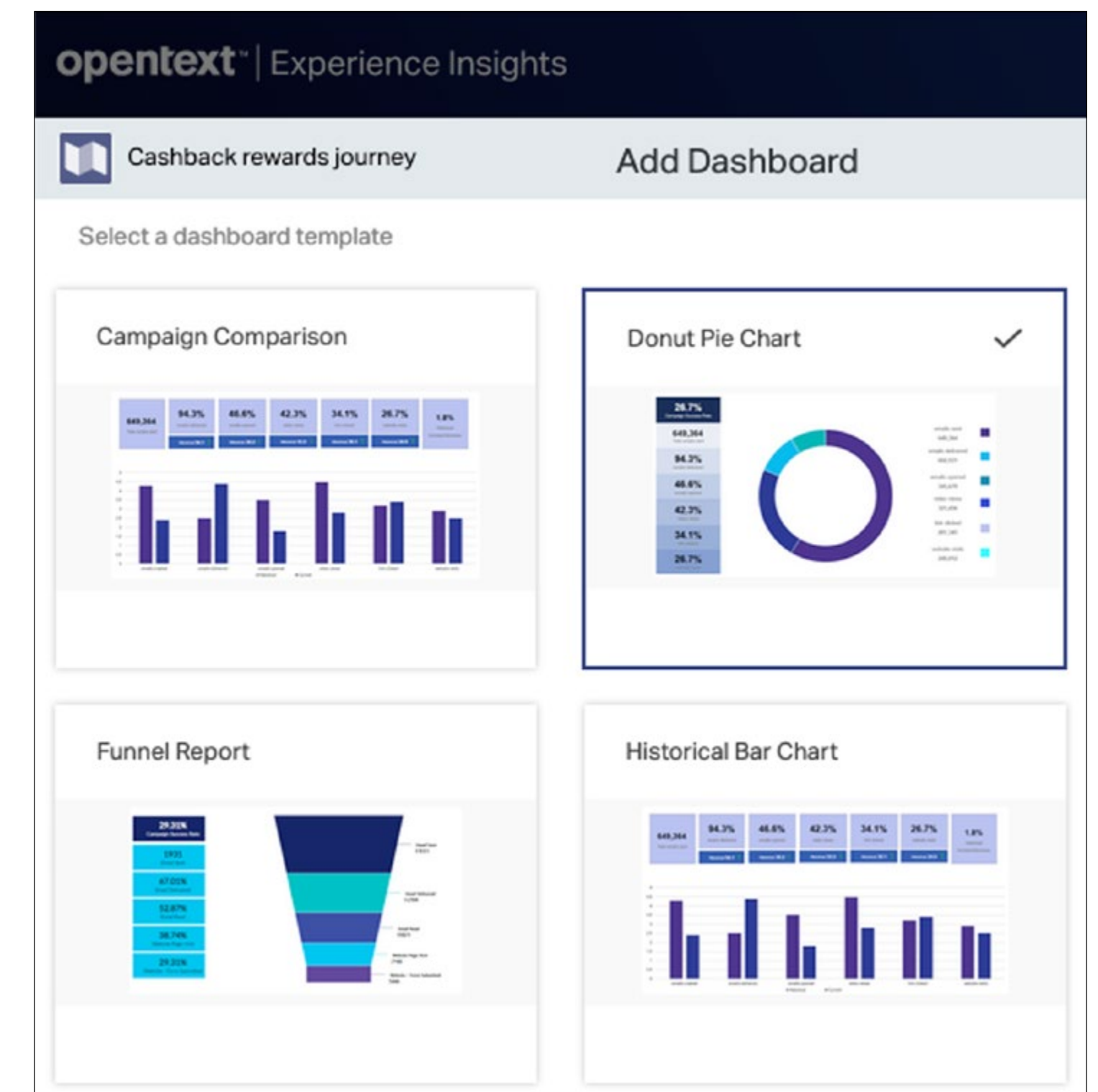
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All interactions, whether it is a call to the customer service, an email or a chatbot session, must be captured and analysed, to understand the customer needs and take action.

To offer relevant customer experience and retain customers, companies must rely on technologies such as AI to automate and personalize experiences. Collecting and analysing data to make insightful decisions is central to continuously improving the experience.

OpenText offers solutions to create and deliver content and communications across all channels, as well as solutions to collect customer insights, analyse feedbacks and visualize customer journeys.

OpenText Explore is a Voice of the Customer solution that helps organizations stay close to their customers by better understanding them. The solution uses powerful speech analytics software and multichannel analytics to “listen” to the customer. It analyzes emails, chatbots, social media, call centre communications, ad hoc surveys, and other voice and text interactions to understand key issues and identify quickly potential solutions. With Core Experience Insights, customer experience experts can visualize touchpoint performance with customizable dashboards.



OpenText offers visualization capabilities with OpenText Core Experience Insights

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Benefit summary

- **Personalized experiences:** Tailor communications, including quotes, proposals, contracts and service documents for a personalized experience that boosts customer engagement, drives revenue and improves brand loyalty and brand consistency.
- **Automated document generation:** Automate and re-purpose dynamic templates and documents to save time, money and the need for technical resources.
- **Multichannel communications:** Reach out to customers through their preferred channel, including smartphones, social, email, SMS and more, to help increase business metrics, such as click-through-rates (CTRs).
- **Risk management:** Respond to regulatory changes and mandates quickly with the flexibility of editing content and templates, as well as adhering to accessibility requirements
- **Predesigned templates:** Leverage the template library for quotes, contracts, proposals, service documents, general customer correspondence and more and reduce time spent developing complex document templates.
- **Flexible deployment options:** Download from the Salesforce AppExchange and operate in either Software as a Service (SaaS) mode, managed and run by OpenText, or Enabler mode, allowing Exstream users to connect seamlessly to the platform wherever it is installed.
- **Easy accessibility and reuse:** Access created items later in Salesforce, as well as inside OpenText™ Extended ECM, making them accessible to non-Salesforce users and avoiding extra Salesforce storage costs.



About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit [opentext.com](https://www.opentext.com).

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Find examples of how payback
and ROI can be achieved »



Executive brief: OpenText Exstream for Salesforce

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