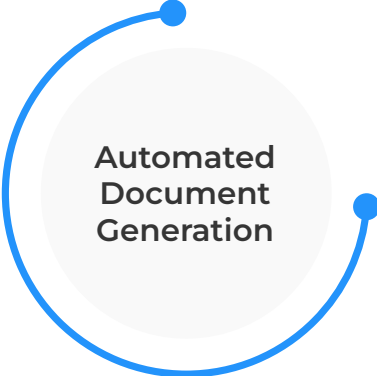# Automating Communications for an **Australian State Government-owned Company**

- Automated Document Generation
- Multi-channel Communication
- Improved Customer Experience

## About the Client

The client is an Australian state government-owned company. Under various predecessors, the company has been offering administration, trustee, and estate-related services since 1851. The organization exists to support people plan, manage, and live on through every phase of life. It takes on the responsibility to deliver public benefit through expert support and vital services to improve the financial, personal, and social wellbeing of its customers.

# The Problem Statement

The client was facing delays in the generation and delivery of external and internal documents. Searching and retrieving information from its customer records was a cumbersome and time-consuming process. Employees had to refer to multiple systems and applications for information, leading to decreased productivity and delayed customer service. Also, the lack of tracking and monitoring capability resulted in transparency issues.

# Key Objectives

The client was seeking a solution to automate the communication generation process to ensure seamless communication within the organization and enhance the customer experience.

- Implementation of organization-wide Customer Communication Management (CCM) system

- Support for creation and delivery of internal and external documentation and correspondences

- Standardized and easy-to-use interfaces for employees

- Exchange of information from multiple systems, including Oracle-based systems, Salesforce, and more

- Increased customer experience through multiple communication distribution methods

# Transformed Communication Process with Newgen

The client selected Newgen's Omnichannel Customer Engagement (CCM) product suite, for implementing an organization-wide CCM system. The suite, built on NewgenONE Digital Transformation Platform, will enable the organization to create and deliver internal and external documentation and correspondences. This will enable the organization to streamline and transform the end-to-end communication process.

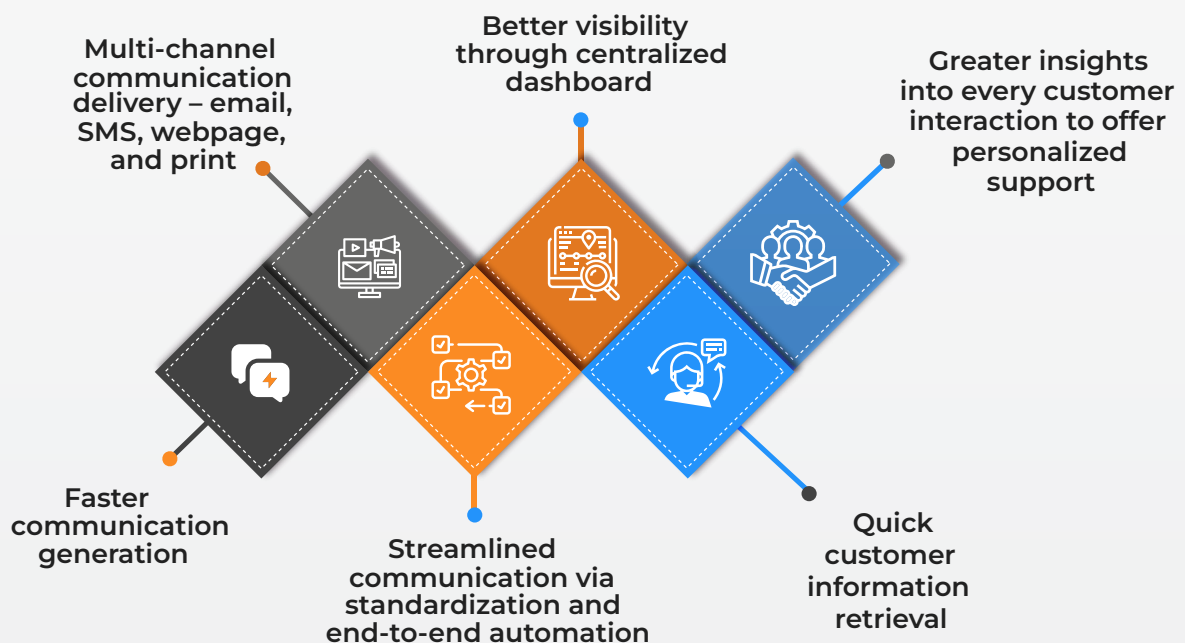| The Problem Statement | Our Solution |
|---|---|
| Delay in the generation and delivery of external and internal documents | A centralized library to use pre-defined templates would result in less generation time. Real-time/scheduled batch delivery of communications as per the preferred channel |
| Lack of tracking and monitoring capabilities for communications sent | Real-time dashboards and drill-down reports to monitor the status of delivered, failed, and pending communications batch-wise |
| Use of multiple disparate systems to merge and utilize data | Newgen's CCM system to act as a single point to exchange data from multiple sources through APIs/web services-based integration with existing systems |
| Business users' reliance on the IT team while creating, modifying, and deleting templates | Easy-to-use GUI based composition designer where business users can design the templates and link them with the database by themselves |
| Limited capabilities around long term archival of document templates and different versions | In-built structured document repository to archive and manage various versions of documents with enhanced search capabilities |
| The current application is not coded to support new versions of MS Office applications | Newgen's solution supports the latest MS Office versions. Each new product version/enhancement is reviewed before release to ensure the complete functionality |

# Key Highlights of the Solution

**In-built extensive template management capabilities**

**Easy-to-use drag and drop tool to enable flexible designing of communications**

**Multi-channel communication distribution and tracking**

**Secure document creation and delivery**

**Solution deployed on Newgen's managed cloud**

**User-friendly, automated document generation**

Seamless integration with core systems and business applications (like Salesforce) to push and pull data. Changes in the customer profile, including change in address/contact details, bank validation, product expiry, and more, sends triggers from Salesforce to Newgen's CCM system for communication generation. Seamless integration of the CCM with Salesforce ensures easy access to the required data/documents. The generated record gets archived in an objective repository, and the placeholder for any such future communications is placed in Salesforce.

# Solution Benefits

**Multi-channel communication delivery – email, SMS, webpage, and print**

**Better visibility through centralized dashboard**

**Greater insights into every customer interaction to offer personalized support**

**Faster communication generation**

**Streamlined communication via standardization and end-to-end automation**

**Quick customer information retrieval**

**newgen**

April, 2022