Choosing a Customer Communications Solution

Find the Right System for Your Regulated Customer Communications.

elixir

Choosing the right Customer Communications Management (CCM) system is important for your business. CCM refers to the strategy and technology used to improve, automate, and optimize customer interactions across various channels. An effective CCM system is crucial for maintaining strong customer relationships, ensuring compliance, and driving business growth.

This checklist covers key factors to consider when choosing your CCM. Plus, we'll highlight some helpful statistics and industry trends to guide your decision making.

Ultimately, we want to help you find a system that fits your needs today and can grow with you in the future. With insights into what's working across the industry, you'll be better prepared to make a smart decision. Let's dive into what to consider before choosing your CCM system.

How to Use this Checklist

This checklist is broken into 10 key factors / criteria to consider when choosing a new CCM system. For each factor, think about the criteria and the follow-up question. Check off the criteria (either as you go or in the overview list below) if you believe the system you're considering meets it. We've filled in some information about Elixir Cloud for you already. We've also included space for notes.

Key Feature Checklist

Scalability
Will the system scale with business needs?

Customization
Will it fit your specific business needs?

Integration
Can it work with your existing systems?

Support and Training
What support will be offered to your staff?

User-Friendliness
Does the UI work for non-technical staff?

Cost
Does it fit your budget?

Deliverability
Does it offer delivery across channels?

Futureproofing
Will it still work for you in the future?

Security and Compliance
Does it meet or exceed security standards?

Customer Reviews
Have others had a good experience?

Scalability

Scalability is a top consideration for 80% of businesses. Can the proposed CCM system scale with your business needs?

Elixir Cloud ✔

As a cloud-based solution, Elixir Cloud is built to grow and scale with customers. This means you can easily increase or decrease your usage based on demand, without the need for significant infrastructure changes. Cloud scalability ensures you're prepared for both seasonal fluctuations and long-term growth.

Notes

Integration

70% of organizations prioritize integration capabilities when looking for a new CCM. Does the proposed solution integrate seamlessly with existing systems (CRM, ERP, etc.?)

Elixir Cloud ✔

Don't let your data stagnate in silos. Our robust Connector Marketplace makes integration easy. Leverage pre-built, low-code connectors to 3rd party ERP, CRM, and Marketing Automation solutions.

Notes

Seamless integration drives significant cost savings and efficiency gains. What could you gain from reducing manual data entry, minimizing errors, and streamlining workflows across different departments?

User-Friendliness

A user-friendly interface increases employee adoption by 40%. Is the proposed platform easy to use for non-technical staff?

Elixir Cloud ✔

Pre-built rules, templates, and other assets empower business users to create communications faster. For example, our drag-and-drop interface allows users to easily design personalized email templates without coding knowledge.

Notes

Deliverability

40% of consumers cited "multiple options for communicating" as the most important feature of a company's customer service. Does the proposed solution allow for communication delivery across channels?

Elixir Cloud ✅ Notes

Our modern, cloud–based platform lets you reach your customers where they are now and in the future. Leverage email, SMS, print, web, and social media. Coordinate campaigns across channels for maximum impact.

Security and Compliance

At least 90% of enterprises consider security and compliance critical. Does the proposed CCM system meet or exceed industry security standards and compliance requirements?

Elixir Cloud ✅ Notes

Our SaaS architecture ensures robust security and scalability using Kubernetes namespaces, dedicated databases, and isolated storage and caching services.
- HITRUST.
- SOC2 certified.
- HIPPA complaint.

How does the system handle data protection regulations like SOC2, HITRUST, or industry–specific requirements like HIPPA. Look for a CCM system that can help you maintain compliance while managing data and communications.

Customization

Different businesses have different needs. That's why customization options are essential for 60% of companies. Can the proposed system be tailored to your specific business needs?

Elixir Cloud ✔

Easily configure individual workspaces and create different workflows, depending on the project or team(s) involved. For instance, you can set up separate approval processes for marketing communications and regulatory notices, ensuring the right people review each type of content.

Notes

Support and Training

Different businesses have different needs. That's why customization options are essential for 60% of companies. Can the proposed system be tailored to your specific business needs?

Elixir Cloud ✔

Easily configure individual workspaces and create different workflows, depending on the project or team(s) involved. For instance, you can set up separate approval processes for marketing communications and regulatory notices, ensuring the right people review each type of content.

Notes

> "
> Unlike other vendors, the Elixir team provided end–to–end service. They listened to our problems, devised and implemented solutions, and trained our teams to manage this solution ourselves, while remaining available afterwards to provide great support.
> – Director, Marketing and Product
> "

Cost

Hidden costs are an issue. In fact, 30% of businesses cite hidden costs as a major concern. What are the total costs involved, including hidden fees?

Elixir Cloud ✔

Save an average of 50% over other platforms with flexible pricing and packaging. Our consumption-based pricing model aligns costs with actual usage, optimizing your CCM spend.

Notes

> Consider evaluating the potential return on investment (ROI) of the CCM system. Look at factors like improved customer satisfaction, reduced operational costs, and increased efficiency to determine the long-term value of the investment.

Futureproofing

We can't see the future, but we know that futureproofing is important for 65% of companies. How does the proposed vendor plan to update and improve the system you're considering? What is their roadmap for incorporating new features and emerging technologies?

Elixir Cloud ✔

We've been around for almost 40 years. We understand that communication needs evolve. Our cloud-based product will grow and evolve with customer needs.

Notes

Customer Reviews

Outside opinions are key when choosing what to buy. That's why 70% of buyers rely on customer reviews for decision-making. What do other customers say about the system you're considering?

Elixir Cloud ✅

For nearly 40 years, customers have trusted Elixir to help them manage their customer communications. We value our customer relationships and we will continue to support our users as we move into the future.

Notes

> " Elixir has a vast amount of domain knowledge and experience with regulated materials and has established best practices regarding the procedures pertaining to ANOC and EOC documents. We're extremely happy with the Elixir team. "
>
> *– CareMore*

Conclusion

Selecting the right CCM system is a crucial decision. The choice you make can significantly impact your business operations and customer relationships. Because of that, it's important to consider factors like those we've listed in this checklist. Doing so allows you to make an informed choice that aligns with your organization's needs and goals.

Use this checklist as a guide during your evaluation process. And don't hesitate to ask potential vendors detailed questions about each of these areas. With careful consideration and thorough research, you can find the right CCM system. One that both meets your current requirements and positions your business for future success.

Elixir Cloud Checks All the Boxes

Elixir has been the leader in personalized customer communications for nearly 40 years. Elixir Cloud is powerful enough to scale communications for some of the world's largest organizations. At the same time, its flexible, scalable capabilities can accelerate modern communications for smaller organizations as well.

Want to see it in action? Contact us today to schedule a demo and discover how Elixir Cloud can elevate your customer communication strategy.

Schedule a Demo

📞 +1.805.641.5900

🌐 www.elixir.com