



Achieving Customer Centricity with AfterMail

Abstract

Much has been made of the importance of delivering a customer centric view. In fact, this was the fundamental premise of customer relationship management (CRM) systems and how they could assist organisations in the acquisition, retention and expansion of their customer base.

As time has progressed, this vision has become more difficult to achieve. Customer information is no longer held only in the CRM system; many other systems contain valuable information that can enable organisations to achieve the nirvana of a customer centric view.

Email is perhaps the most under-rated source of information, yet it is also one of the most difficult to integrate. Up to 70% of an organisation's knowledge – including customer-related information – is stored within email messages, however many of the leading email systems do not provide easy access to this information.

AfterMail enables organisations to provide access to this information, using open, standard technologies to facilitate the integration of email content with other systems, while also providing a comprehensive record of all email interactions. AfterMail is key to the delivery of a customer centric view.

Introduction

The core principle of providing a single, customer centric view of customer information is an attractive one, and a goal that is sought by virtually all organisations.

The assumption is that by providing easy access to all customer-related information – regardless of where that

information may be stored or located – an organisation will better understand its customers, and have the appropriate information available in order to provide its customers with the products and services that they desire.

Customer relationship management systems were designed with this goal in mind. Sales, service and support information would be easily accessible, and anyone in the organisation could get an instant view of the status of a relationship with a customer.

It has become apparent that CRM systems alone only contain a part of the customer centric view – there is customer-related information contained in many other places, including within call centre systems, document management systems, and email.

AfterMail achieves customer centricity by:

- Providing a single view of all customer interactions, including all email communications that have occurred.
- Utilising leading technologies to provide access to email messages from your CRM system, with minimal risk and disruption to your organisation.
- Enabling organisations to realise benefits such as increased sales, cost savings and increased productivity by providing access to an underused source of key corporate knowledge.

The Customer Centric Vision

Over the past few years, organisations have focused their attentions on making their organisations operationally more efficient, reducing the cost of running the organisation on a day by day basis. As the economy has improved, attention has once again focused on the customer, and ways in which new customers can be attracted, and the revenue generated by existing customers can be enhanced.

The vision of customer centricity is focused on both these objectives, enabling organisations to obtain a complete view of their customers, including all interactions with them, all documents and information that may relate to those customers and all of the communications that have been made with those customers.

This information may be stored in many distinct locations, each of which could contain valuable information that could assist the organisation's relationship with that customer. Call centre systems will contain details of calls the customer has made to the helpdesk, which could relate to problems the customer has; documents which may have been written to, or received from, the customer may be stored within the document management system; while details of sales-related calls could be contained within the CRM system.

The goal of customer centricity is to provide easy, central access to this information, regardless of where this information may be located.

The Challenge of Email

In the case of communication, the challenge of providing a customer-centric view has become more complex as the number of channels through which we communicate with our customers has increased, as has the number of sources that contain customer-related information. Organisations no longer merely use the telephone and fax to communicate – email has become an effective, inexpensive form of communication, facilitating communication across the office, across the city and across the world.

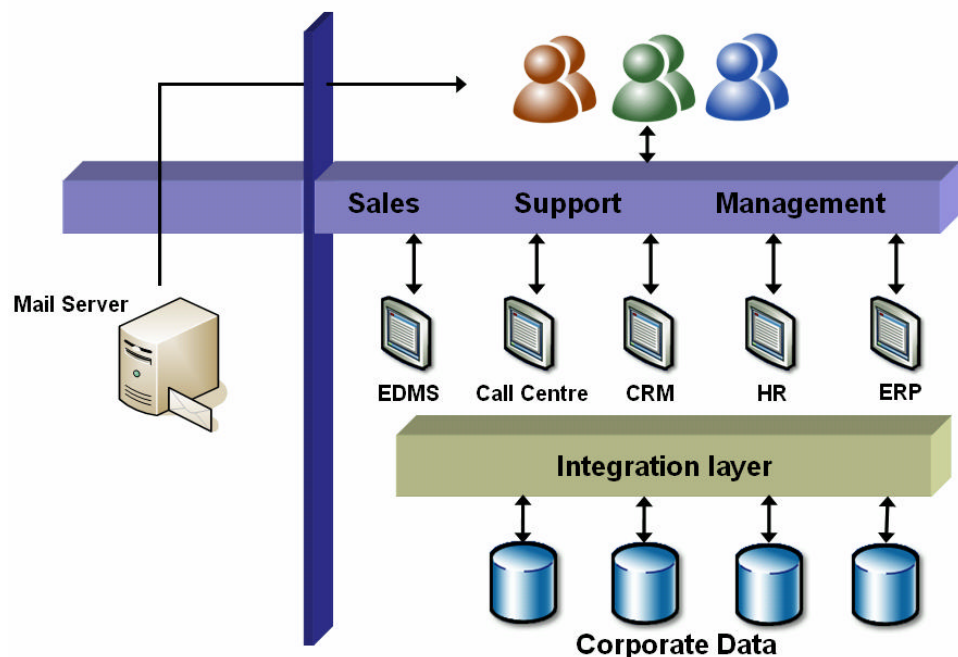
As a result, email is now one of the most common forms of communication with customers, and it is within email that much knowledge about an organisation’s customers is contained.

Such information is critical to any organisation, and needs to be harnessed to provide a comprehensive view of the interactions with an organisation’s customers. Reasons for being able to access this information include:

- Confirming commitments that have been made between your organisation and the customer organisation;
- Identifying key contacts within the customer organisation, and who the decision makers are, while also understanding who within your own organisation deals with the customer on a regular basis;
- Detecting issues and concerns the customer may have of your organisation – that you may or may not be aware of – and what your organisation is doing to address these;
- Recognising what your organisation is doing well and what is appreciated by the customer, so that you can focus on this when you next meet with them.

In short, email is used to communicate formally and informally with a customer, and this information is important when understanding the needs and wants of your customers.

Unfortunately, the way in which email is stored by most email systems does not make it easily available to outside systems, as shown in the diagram below.



Many email systems store email messages and attachments in a hierarchical format, which prevents them from being accessed in a similar way to how information is accessed in the other systems; this effectively creates a barrier between the email system and other systems within the organisation.

Often, in order to provide such access, email messages have to either be manually copied into these systems, or an entire copy of the message has to be stored within the, for example, CRM system itself, resulting in an additional data store for the IT department to manage. Regardless of the approach, there is significant effort involved to provide customer-based access to email messages.

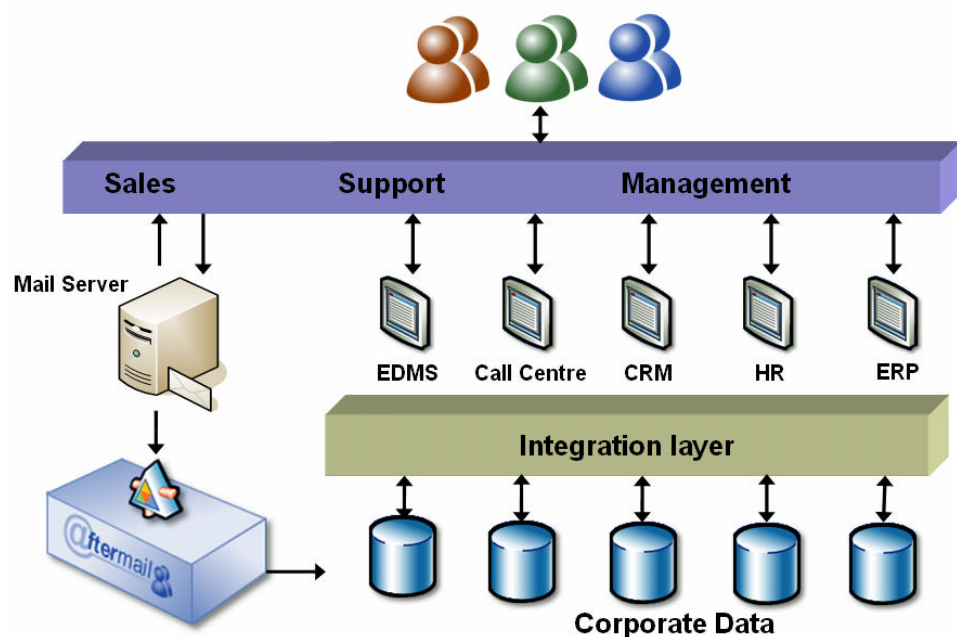
The easy option is to ignore the issue, however with upwards of 70% of the knowledge of an organisation being stored within email messages and attachments – including customer information – email is a valuable source of information of all kinds.

In addition, it is not only important to be able to access recent email messages; if an organisation’s relationship with a customer goes back several years, they will also need to provide access to email messages created at that time. Only then will a full customer centric view of the customer be achieved.

Achieving Customer Centricity

In order to provide a customer centric view that incorporates email, an alternative approach needs to be considered.

Email needs to be stored using a different structure, using technologies that enable the information contained within the email message – and any attachments – to be easily accessible – while processes need to be put in place to ensure that all messages – past, present and future – can be used to deliver the customer-centric view.



AfterMail applies knowledge management principles to email management, enabling organisations to archive, retrieve and report on all email communications performed by and with their organisation.

AfterMail captures all email messages and stores the messages, including their attachments, in a structured database. Past emails can also be imported into the system, enabling a comprehensive view of the interactions any customer has had with your organisation. This information can then be accessed and reported on – either directly or through other systems – based on the security principles employed.

Email messages and attachments stored within the AfterMail system are also tamperproof, with checks made to the content to ensure it has not been modified; any modified messages or attachments are easily identified.

Access to these messages and attachments can be performed in numerous ways.

Search Access

Searches can be performed across the content of messages and their attachments, along with the core metadata of the messages. Thus, messages sent to, or received from, particular contacts or customers can easily be identified, together with details of who may have received a particular document or file.

Open Technologies

AfterMail has been designed to utilise leading technologies to provide an open and flexible platform for accessing email knowledge. Key features include:

- **Use of Web Services and XML** - AfterMail utilises XML and web services standards to enable information contained within the AfterMail repositories to be accessed by other applications.
- **Open Database Technology** – Details of all email messages are stored in a Microsoft SQL Server database, and access to this data can be provided to other applications or tools.
- **Multiple Server and Platform Support** – Unlike its competitors, AfterMail is able to support a broad range of messaging servers, including Microsoft Exchange, Novell GroupWise and Lotus Domino. AfterMail can also work in a mixed platform environment, where two or more of these messaging servers are used.

By utilising the open architecture of AfterMail, organisations can provide real-time access to all email messages that have been processed by your organisation's email servers. From a CRM perspective, this will enable you to get a definitive, accurate view of all interactions with your customers and understand their requirements more quickly and easily than ever before, with minimal disruption to your existing CRM system and, as a result, your organisation.

AfterMail is an email knowledge management solution that enables organisations to capture, store and report on electronic mail messages.

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