


Manage the entire customer communications lifecycle using xPression 3 and Documentum D6 as your enterprise solution

 When information comes together,  
your world moves ahead.

# Customer communications management made easy

What if there was a way you could easily and efficiently communicate with your customers, constituents, or clients using highly personalized correspondence letters? What if your welcome kits, account statements, contract proposals, policy manuals, product catalogs, service documents, and marketing materials could be customized and produced automatically in whatever format was preferred? What if every communication you sent was timely, consistent, relevant, and compliant with your branding and legal guidelines? What if, on top of all that, the solution was environmentally friendly?

EMC Corporation, the world leader in information infrastructure solutions, has developed an enterprise-scale solution that fully manages the entire customer communications lifecycle. From targeting prospects, signing up new customers, and servicing existing clients to up-selling and cross-selling products and services to them, the EMC Document Sciences xPression® 3 software suite combined with the EMC Documentum® D6 enterprise content management platform covers it all.

**“You have to figure out a different way to reach your customers and capture their attention. Our research indicates that customized correspondence is increasingly viewed as an effective differentiator.”**

**Adam Honoré, Senior Analyst, Aite Group**

## How does it work?

xPression 3 automates the creation, design, and delivery of highly personalized and customized client communications. Documentum D6 manages the transactional workflow, business process, and archiving of all types of content across the enterprise within a common information infrastructure. Together xPression 3 and Documentum D6 provide a first-class, end-to-end solution for elevating client relationships.

xPression 3 leverages enterprise content stored in Documentum D6 to generate dynamic marketing collateral, regulated contracts, relationship statements, personalized correspondence, rich HTML e-mail, and sophisticated Web landing pages. Documentum D6's advanced business process management capabilities, which are tightly integrated with xPression 3's document-generation Web services, enable you to generate customer communications in real time either in response to events (e.g. customer requests or renewal triggers) or at particular steps within a business transaction (e.g. opening a bank account or managing an insurance claim).

Whether delivered electronically or in print, any communication you send to customers can then be archived in Documentum D6 for long-term records management and reuse.

## What are the capabilities of the new solution?

Sophisticated yet easy to use, the xPression 3-Documentum D6 solution provides a variety of unique capabilities for your customer communications.

### Content creation and management

Documentum D6 enables enterprise content such as Microsoft® Word documents, RTF documents, PDF files, XML data, and digital assets (e.g. logos and signatures) to be managed in a centralized repository. Documentum D6 also provides features such as version management, collaboration, advanced search and retrieval, access control, and a Web-based interface.

### Dynamic design

Dynamic document templates use rules and variables to personalize and customize content to specific recipients. Designers using any of xPression 3's design tools to define the content, layout, and business logic of a dynamic document template can use any of the managed content items in a Documentum Database either at design time or at runtime. The document designer has a choice of the following four design tools based on the type of customer communication being designed:

- **xPresso for Adobe® InDesign®**—Leverages the widely used Adobe InDesign Creative Suite to create graphically rich and highly customized statements, marketing brochures, catalogs, and other frame-based documents.
- **xPresso for Word 2007**—Uses Microsoft Word to create text-based documents tailored for the recipient, including proposals, contracts, policies, and other correspondence.

- **xPresso for Dreamweaver®**—Employs Adobe Dreamweaver to create highly personalized HTML e-mail and Web landing pages without time-consuming and costly coding.
- **xDesign**—Enables the design of complex, hierarchical document packages that include one or more subdocuments.

The combination of xPression 3's dynamic document design tools and Documentum D6's repository services enables multiple teams across your enterprise to collaborate and control shared content without relying on IT personnel. The business team can change content to meet revenue demands. The marketing team can ensure content and design adhere to branding. The legal team can approve all regulated content.

### Customer communication generation

Business users such as bankers, insurance agents, customer service personnel, contract managers, and financial advisors can access an intuitive, process-enabled Web interface to generate any type of customer communication. The Web interface is embedded within a workflow process to ensure compliance with internal and external business processes.

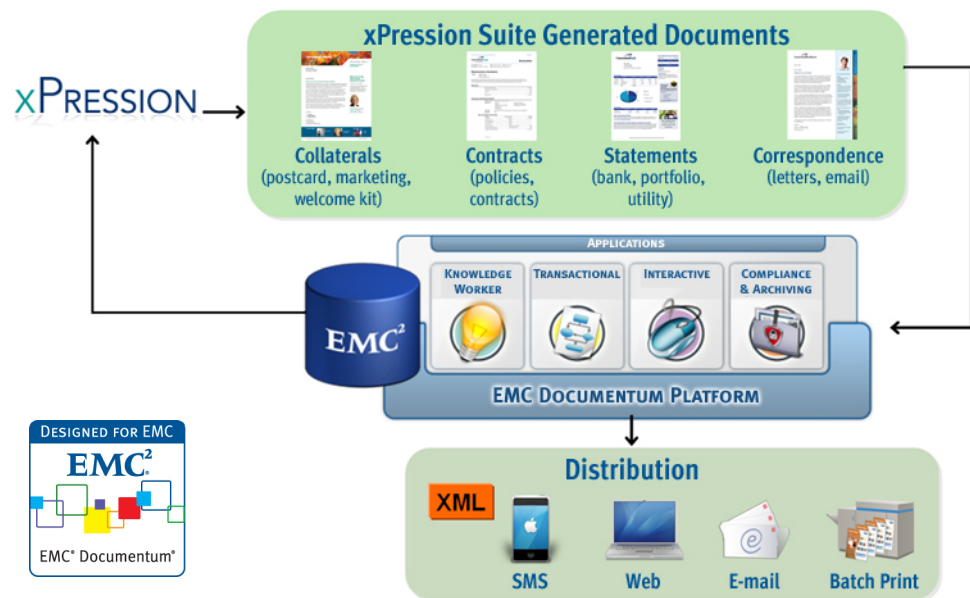
A variety of business processes require the generation of personalized customer communications, such as account openings, claims processing, contract negotiations, and service fulfillments. Individuals using the Documentum D6 component TaskSpace can model these and other processes using an intuitive, Web-enabled interface. Any step in the workflow process can invoke an xPression web service to generate, preview, and distribute any kind of customer communication. In this way, the generation of a particular type of communication (e.g. an insurance claim correspondence with a check) can be tied to executing a specific transactional workflow, which is controlled to enable access for only those users with permission or required approval.

### Content archiving

Administrators using the Web-based application xAdmin can configure Documentum D6 repositories to be accessed from xPression for archival of customer communications, including letters, proposals, e-mails, and contracts. Customer communications generated by xPression, both through a high-volume production batch job or through individual on-demand requests, can be stored directly into a Documentum Docbase with the correct index and metadata, making them available for records management, searching, retention, and retrieval.

### What type of integration architecture is offered?

xPression 3 has a service-oriented architecture, adhering to industry standards such as Java EE, XML, Web Services, and Microsoft .Net to design, assemble, compose, and generate dynamic documents at high volume for electronic or print delivery. The xPression software suite is an enterprise solution that integrates with an organization's existing environment and data sources, including relational DBs, XML, flat files, and mainframe data.



*This image depicts the xPression 3–Documentum D6 integration architecture. Documentum is the repository for all enterprise content. Business processes are modeled using BPM capabilities. xPression pulls content from Documentum into dynamic document templates designed using xPression design tools. The xPression templates are then used to generate customer communications, which can be triggered by steps in any of the workflows modeled in Documentum. A workflow step collects the required data as an XML record and calls the appropriate xPression Web Service to perform the document generation task. Any of the documents generated by xPression can then be stored into Documentum for archival and distribution. xPression produces the correct index for each document based on the object meta-data in Documentum.*

## The solution at work

Here's an example of how xPression 3 and Documentum D6 manage customer communications for insurance claims processing.

An insurance agent, a supervisor, and a claims adjuster all use predefined workflows within Documentum D6 to process an accident claim.

The agent enters details about the accident and uploads all supporting material into a single folder. If any information is missing, the workflow automatically calls an xPression 3 web service to generate a letter or e-mail to be sent to the customer asking for additional information.

Once all the accident information has been provided, another correspondence is automatically generated to inform the customer of the progress of the claim. Simultaneously an internal personalized e-mail with the appropriate link is generated to the supervisor asking for a review of the claim materials.

After the supervisor's review has been completed, an e-mail is sent to the claims adjuster to approve the requested claims amount. Once the amount is approved, another xPression 3 web service call is automatically triggered to generate a detailed letter to the customer, along with a check for the amount.

Throughout this scenario the interaction between Documentum D6's repository for managing all content, xPression 3's document generation capabilities, and Documentum D6's business process management workflow system interact seamlessly to provide a complete solution for insurance claims processing.

## How is the solution environmentally friendly?

Along with the normal pressures to be more productive, cut costs, and boost competitiveness, a new business imperative has been added to the list: going green. As the shift from paper to more environmentally friendly communications accelerates, the need for secure and compliant multichannel technology for customer communications has increased significantly.

The integrated solution of xPression 3 and Documentum D6 enables organizations to overcome all these challenges with realtime, high-volume business communications and multichannel publishing capabilities. The solution helps you become more environmentally friendly by reducing dependency on printed output and increasing the use of electronic communications with clients. Going green has never been easier.

## What type of security infrastructure is used?

The xPression 3 and Documentum D6 integrated solution leverages existing security infrastructures such as LDAP, Active Directory, and other Java EE-capable security systems for user authentication and rights management. Once authenticated, users can perform authoring, editing, and workflow functions, such as review and approval, based on their rights and roles in the organization.

Reviewing tasks and other workflow activities are automatically managed for users who can receive tasks via their standard portal environment, e-mail, or a browser-based, front-end to the system. Documents and tasks can be reviewed and approved in a standard Web browser.

## About EMC

EMC Corporation (NYSE: EMC) is the world's leading developer and provider of information infrastructure technology and solutions that enable organizations of all sizes to transform the way they compete and create value from their information. Information about EMC's products and services can be found at [www.EMC.com](http://www.EMC.com).



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### Take the next step

To learn about xPression 3, visit [www.docscience.com](http://www.docscience.com) or call 888.4.DOC.SCI (outside the U.S.: +1.760.602.1400).