



# Messagepoint Connected



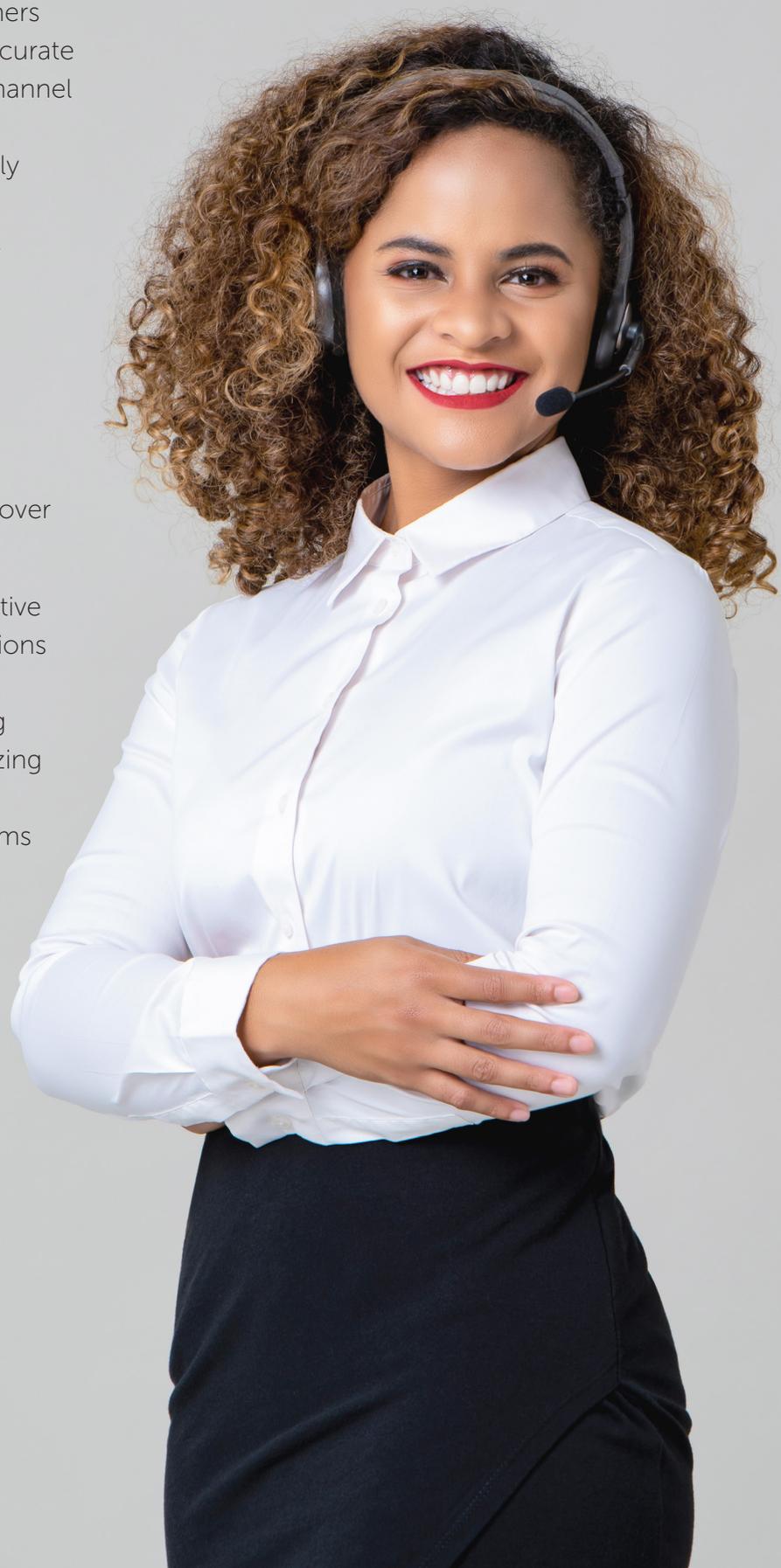
A photograph of two call center workers in a white uniform, wearing headsets, sitting at a desk and typing on keyboards. The image is slightly blurred, focusing on the workers' hands and the text overlay.

**Empower customer-facing workers with interactive content changes for ad hoc customer communications managed in Messagepoint.**

In today's world, customer-facing teams are challenged to respond quickly to customers with highly personalized, relevant and accurate communications – via the customer's channel of choice. This is difficult in the best of circumstances, but it becomes particularly challenging when documents are stored in different formats, on different systems, and in different locations. Precious time is wasted looking for the right materials and it isn't uncommon for an outdated communication to be sent. As a result, individual team members often store materials locally on their desktop and customize them – eroding your control over the message.

Fortunately, there is another way. Interactive communications systems help organizations strike the right balance between control over what is being sent and what is being personalized in the message. By centralizing documents and communications in an interactive solution, customer-facing teams know exactly where to go quickly to access the right documents letters, and emails.

Messagepoint Connected empowers your front-office teams, enabling them to strike that perfect balance, with omni-channel customer communications that are managed in Messagepoint.



# Messagepoint Connected

Messagepoint Connected is a cloud-based, Interactive Communications solution that enables customer-facing workers to quickly personalize, request approvals for (if required) and send communications to customers via print and digital channels.

Messagepoint Connected provides the right balance between centralized control and personalization for your ad hoc customer communications. Working from within Salesforce Sales and Service Cloud, your own customer portal or Messagepoint Connected, your customer-facing workers will:

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**1** **Select the right communication.** Working directly from Messagepoint Connected, your customer portal, or customer account record in Salesforce, teams can select the communication managed in Messagepoint that they want to send.
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**2** **Customize the communication.** Through a dedicated interview screen, your customer-facing worker will answer a few key (and customizable) questions about the customer to dynamically update the communication with relevant text, images, regulatory disclosures, promotional offers, etc. to ensure relevancy.
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**3** **Personalize the communication.** Before sending, a controlled editing experience enables a custom message to be added to the communication to provide one-to-one personalization.
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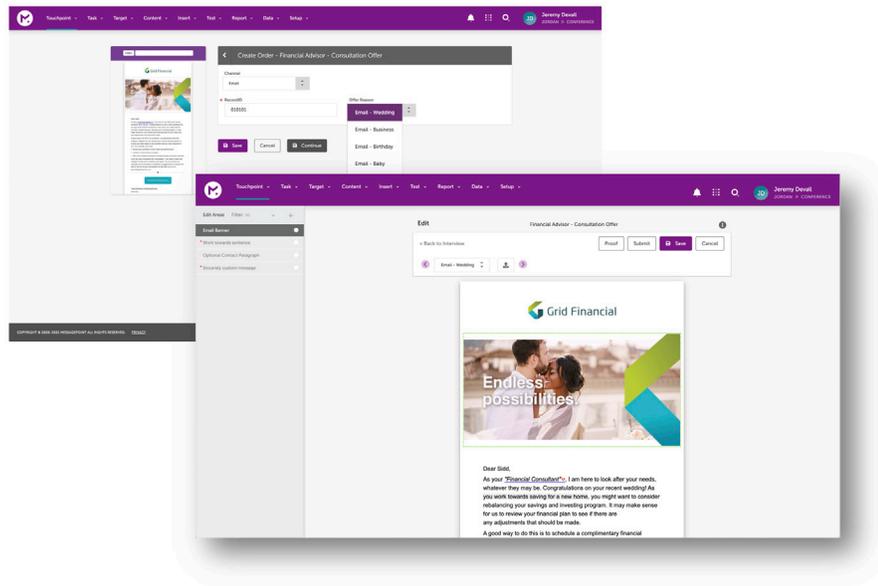
**4** **Optimize the content.** Messagepoint's Assisted Authoring capabilities work in real-time as your teams work to ensure brand alignment, readability and sentiment of every message.
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**5** **Route for approval.** When necessary, customizable workflows can be set up to enable team managers to approve communications being sent. This integrated capability ensures seamless workflow and approvals.
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**6** **Send.** Integrated to your distribution mechanism of choice, Messagepoint Connected supports print, PDF, and email communications.

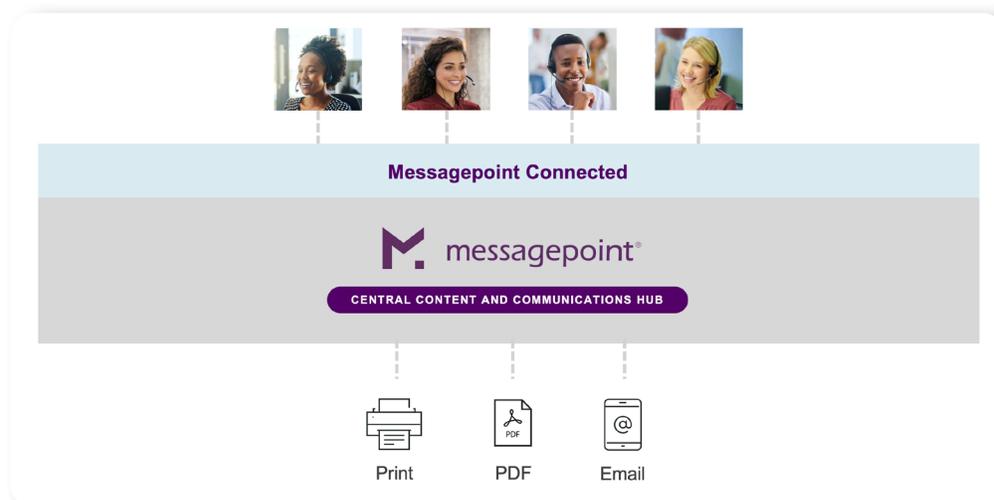
## Empower your front-office teams.

Messagepoint Connected enables your sales, customer service representatives, agents and partners to quickly and easily respond to customers with the approved print and digital communications managed in Messagepoint.



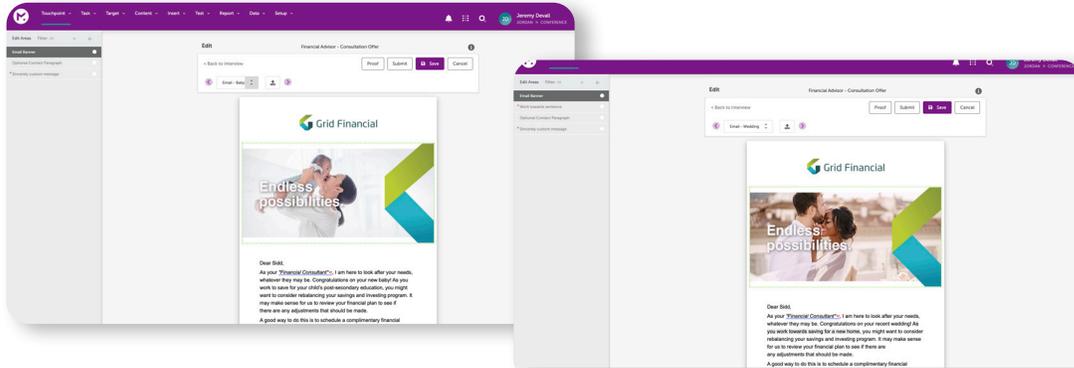
## Get centralized control.

By leveraging documents and communications created and managed within the Messagepoint content hub, your teams can always rest assured that they are sending the right communication to your customers. Messagepoint Connected enables your sales, customer service representatives, agents and partners to quickly and easily respond to customers with the approved print and digital communications managed in Messagepoint.



## Elevate the customer experience through relevancy and personalization.

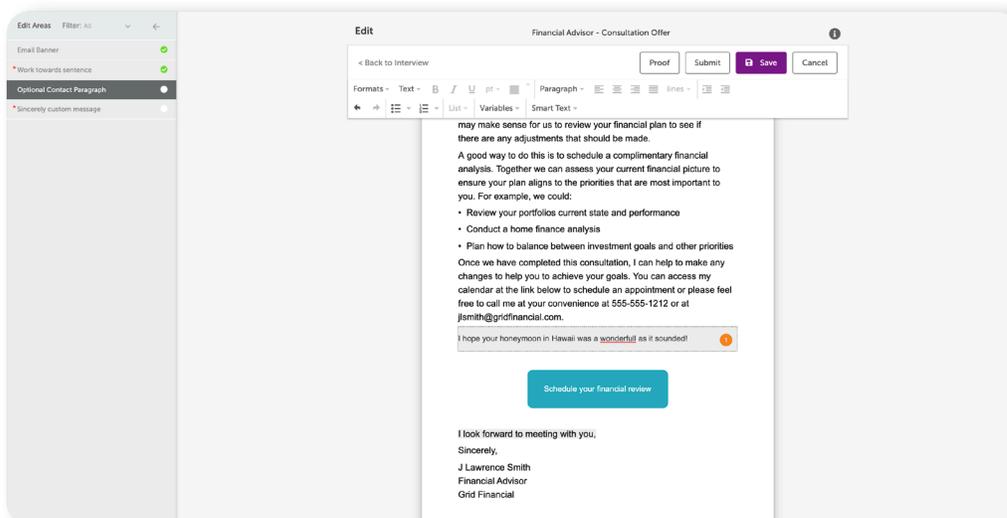
By sending communications with images, offers and messages that target specific customer demographics, needs and interests, or adding personalized notes through a controlled editing experience, your teams can truly fulfill that one-to-one experience that reduces customer turnover and enables upselling and cross-selling, generating more revenue for your organization.



*A wealth management communication that targets images and messaging to the life event experienced by the customer and enables custom text to be added in a controlled editing experience for one-to-one personalization.*

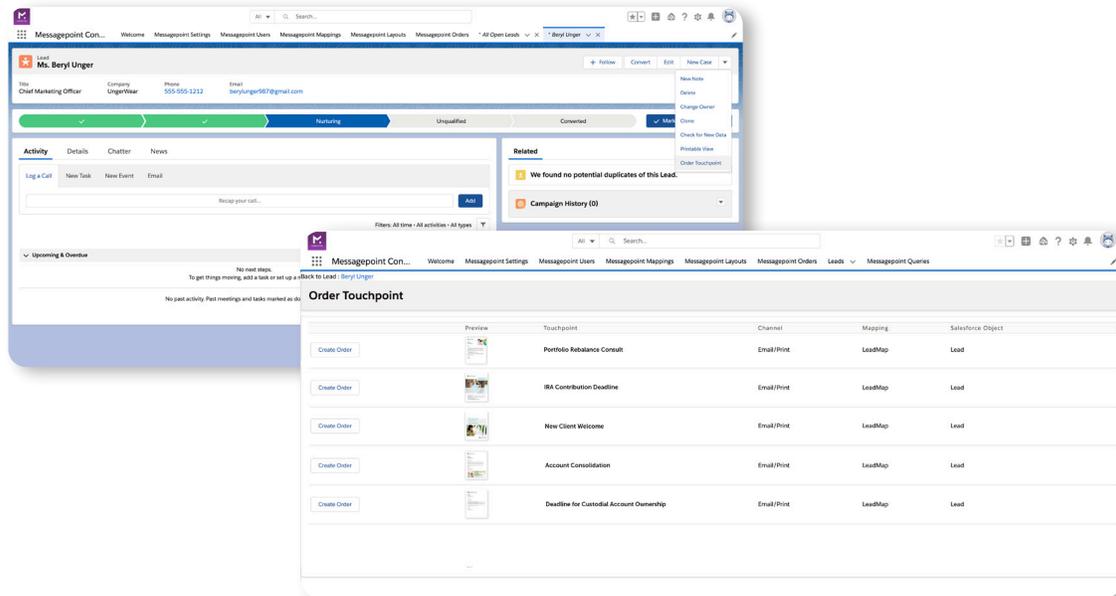
## Edit with real-time proofing.

Update communications with a WYSIWYG-like experience in real-time to accelerate the editing process. Final proofs can be generated on-demand, along with data-driven tests and full production simulations so you're always confident the message being sent looks exactly as it should.



## Work from your customer management systems.

Using our integration to Salesforce Sales Cloud or by integrating to another customer management system using our Portal Integration Kit, your teams can kick off their communication request from portals they're already working in. Messagepoint Connected leverages the data from these systems to drive personalization and ensure your customer data stays exactly where you want it.



Work right from your customer account record in Salesforce to select, target, personalize and track the communication request.

## Optimize your content.

Messagepoint's new Assisted Authoring capabilities enable you to create better, more consistent and compliant content. Powered by the Messagepoint Advanced Rationalization and Content Intelligence Engine, MARCIE, these capabilities:

- Identify duplicate and similar content that already exists so you can reuse what's already there for increased consistency and efficiency
- Identify the sentiment of your messages so that you can evoke the right emotions from your customers to positively and consistently impact the customer experience across all channels
- Identify the reading comprehension level of every message using Flesch and Flesch-Kincaid scoring to ensure communications are in compliance
- Identify violations of the guidelines established in your customizable brand profile

The screenshot displays the Messagepoint Assisted Authoring interface. The main window shows a draft email titled "Financial Advisor - Consultation Offer" from Grid Financial. The email content includes a greeting to "Sidd Finch", a congratulatory message on his wedding, and a financial consultation offer. The interface includes a top navigation bar with menus like "Touchpoint", "Task", "Target", "Content", "Insert", "Text", "Report", "Data", and "Setup". A left sidebar shows "Edit Areas" with options like "Banner", "Optional Paragraph", and "Closing". A right sidebar, titled "Readability Analysis", provides a Flesch-Kincaid grade level of 10.5 (Fairly Difficult To Read) and a desired range of Grade 5. It also includes a "Readability" section with a quick guide to assist with making content more readable, such as breaking up complex sentences and using less jargon.

**Grid Financial**

00Qf400000AckjPEAT  
Sidd Finch  
Bozeman, MT 59715

Dear Sidd,

As your financial advisor, I am here to look after your needs, whatever they may be. Congratulations on your recent wedding! As you get work towards saving for a new home, you might want to consider rebalancing your savings and investing program. It may make sense for us to review your financial plan to see if there are any adjustments that should be made.

A good way to do this is to schedule a complimentary financial analysis. Together we can assess your current financial picture to ensure your plan aligns to the priorities that are most important to you. For example, we could:

- Review your portfolios current state and performance
- Conduct a home finance analysis
- Plan how to balance between investment goals and other priorities

Once we have completed this consultation, I can help to make any changes to help you to achieve your goals. You can access my calendar at the link below to schedule an appointment or please feel free to call me at your convenience at 555-555-1212 or at [jsmith@gridfinancial.com](mailto:jsmith@gridfinancial.com).

I look forward to meeting with you soon.

Sincerely,

*Lawrence Smith*

J Lawrence Smith  
Financial Advisor  
Grid Financial

**Readability Analysis**

Flesch-Kincaid grade level: 10.5 (Fairly Difficult To Read)  
Desired range: Grade 5

Once we have completed this consultation, I can help to make any changes to help you achieve your goals. You can access my calendar at the link below to schedule an appointment or please feel free to call me at your convenience at 555-555-1212 or at [jsmith@gridfinancial.com](mailto:jsmith@gridfinancial.com).

**Readability**

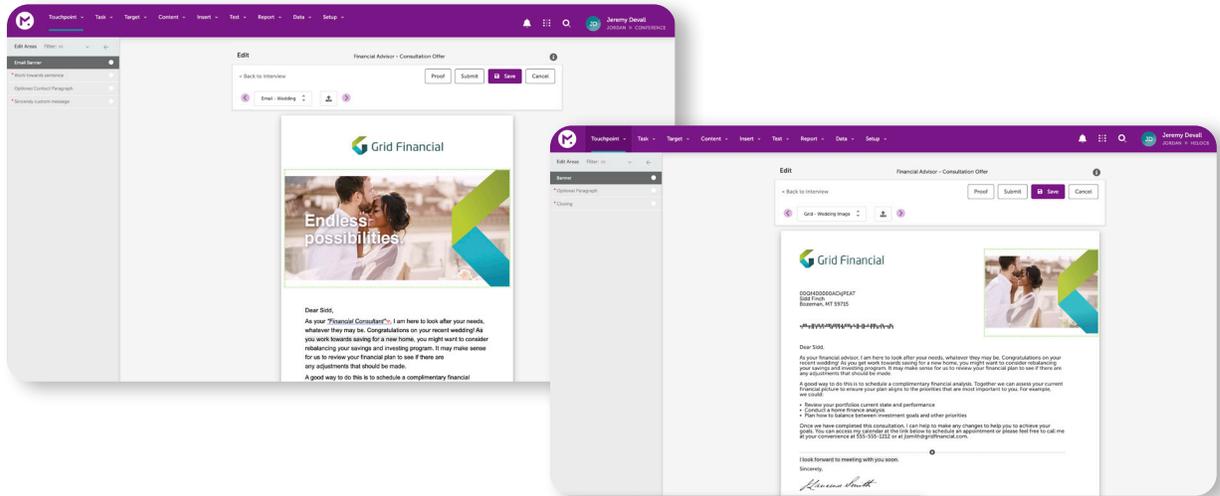
Using the Flesch-Kincaid method, content is assigned a grade level matching the reading level of an average student in that grade.

Here is a quick guide to assist with making content more readable.

- Break up complex sentences. Look for commas. Most of the time, this will require a restructuring of the sentence or a rewrite of the clauses.
- Use less jargon and shorter words. Look for large words that may not be understood by the average reader in your grade range.
- Consider a plain language rewrite. Plain language considers some of the more complex words and structures.
- Averages are important. Some sentences will need to be of a higher reading level. Sometimes larger words and more complex sentences are called for.

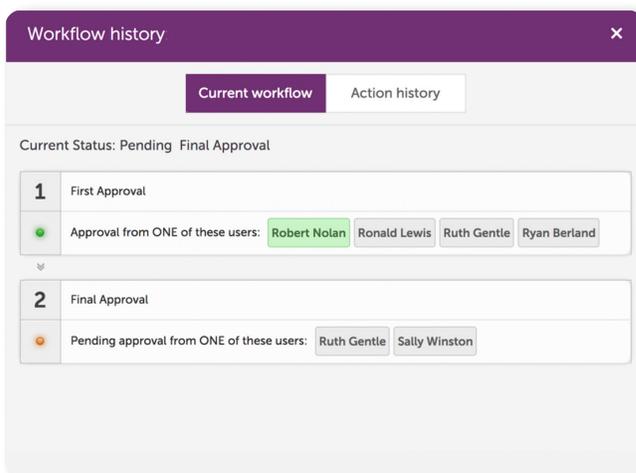
## Send communications how your customers want to receive them.

Ensure that you send communications through the channels preferred by your customers. With omni-channel communication support, Messagepoint Connected can deliver messages directly via digital and print channels.



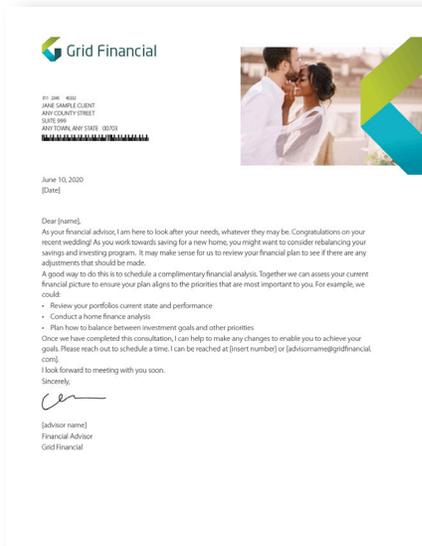
## Control on-demand or batch jobs with custom workflows.

Whether your team needs to send one-off correspondence on-demand or generate a high-volume batch job, they can easily request and send personalized, error-free, on-brand and compliant correspondence and materials. Configurable workflows are available so you can add required approvals where needed.



## Ensure regulatory compliance and accurate communications.

By equipping teams with Messagepoint Connected, you can reduce risk by ensuring only approved documents and correspondence are sent out. Messagepoint's intelligent content management capabilities make it easy to ensure that documents contain the latest, correct legal language so that you're never out of compliance.



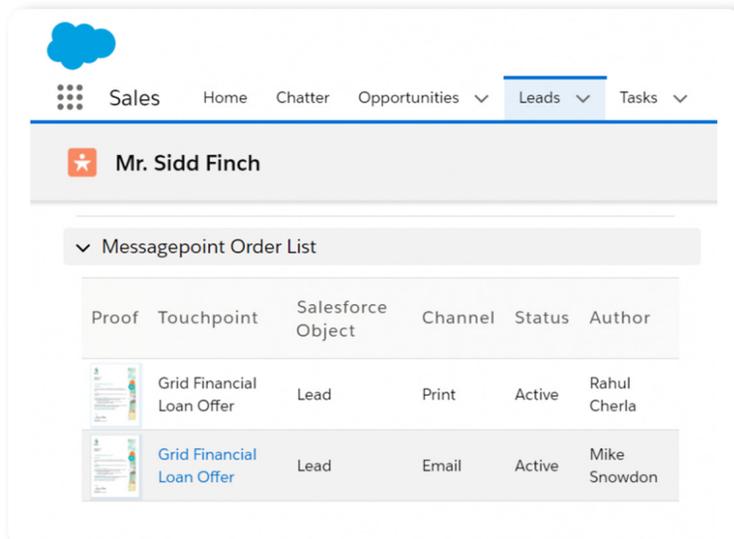
 **Approved**       **Compliant**

Current Status: Pending Final Approval

<b>1</b>	<b>First Approval</b>
	Approval from ONE of these users: <b>Robert Nolan</b> Ronald Lewis Ruth Gentle Ryan Berland
<b>2</b>	<b>Final Approval</b>
	Pending approval from ONE of these users: Ruth Gentle Sally Winston

## Track your customer communications.

Messagepoint Connected logs orders and enables you to see all requests in your customer management portal, like Salesforce, so you know what communications were requested and when.



Proof	Touchpoint	Salesforce Object	Channel	Status	Author
	Grid Financial Loan Offer	Lead	Print	Active	Rahul Cherla
	Grid Financial Loan Offer	Lead	Email	Active	Mike Snowdon

## Messagepoint use cases



### Example 1:

A call center representative sends an email based on a call or interaction with a customer.

## What Messagepoint Connected can do to help

### Send a one-off communication to a specific recipient based on a template with variable content.

Messagepoint Connected provides the opportunity to interactively populate content. This can be done at the recipient level using pre-approved content libraries or authored on-the-fly.



### Example 2:

An insurance agent requests that 200 welcome kits be printed with recipients' contact information and a customized welcome message.

### Request to print numerous identical documents based on a customizable generic template.

The document requestor would simply ask for the document they require and enter the number of copies of the document they want printed.

There may be an opportunity for some content to be populated at the time the request or order is made (from content libraries or authored on-the-fly), but these would be common to all the documents produced.



### Example 3:

A car-dealer marketer creates a mailer to go out to a set of 5000 recipients based on data they have purchased and can populate all of the graphics and text that appear on the piece.

### Request to print a complex document where most or all content is populated at the time the request or order is made.

Content for the data and graphics in the mailer these documents can be sourced from pre-approved content (for example, images and SmartText™ objects) and can be populated interactively on-the-fly, or some combination of both. Communications may or may not have specific recipient-level variable content.



To learn more about Messagepoint® Connected, contact us for a demo at 1-800-492-4103, or visit [messagepoint.com](https://messagepoint.com).



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