



# **Messagepoint Connected**



A photograph of two call center workers in a white uniform, wearing headsets and typing on keyboards. The image is slightly blurred, focusing on the hands and keyboards in the foreground.

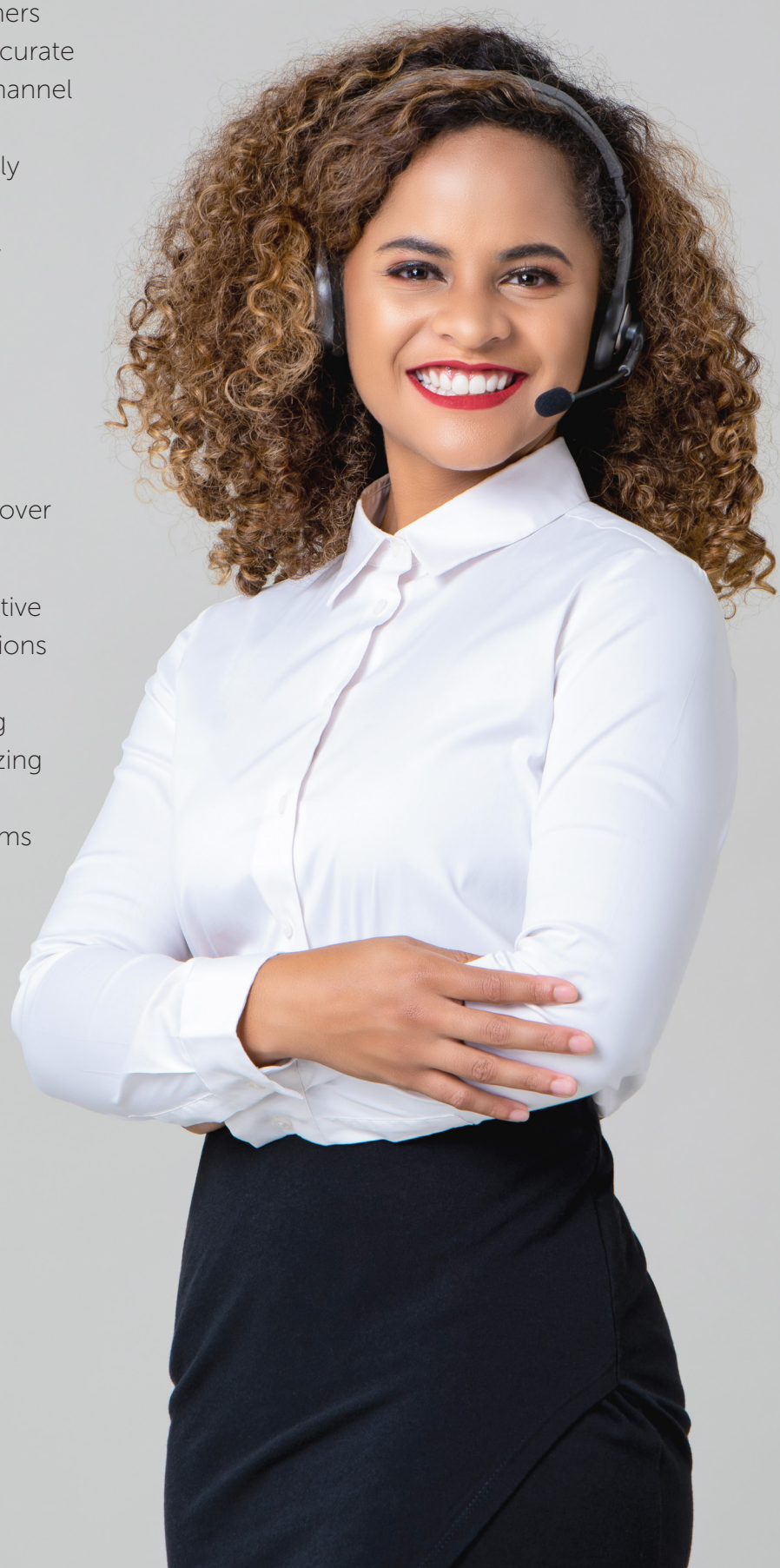
**Empower customer-facing  
workers with interactive  
content changes for ad hoc  
customer communications  
managed in *Messagepoint*.**



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 Precious time is wasted looking for the right materials and it isn't uncommon for an outdated communication to be sent.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

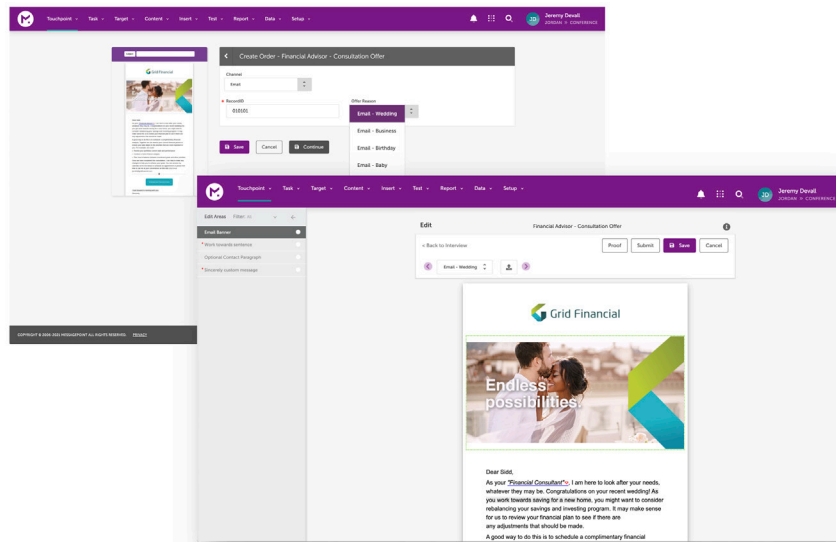
Messagepoint Connected is a cloud-based, linteractive communications solution that enables customer-facing workers to quickly personalize, request approvals for (if required) and send communications to customers via print and digital channels.

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:

-  **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.
-  **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.
-  **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.
-  **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.
-  **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.
-  **6 Send.** Integrated to your distribution mechanism of choice, Messagepoint Connected supports print, PDF, and email communications.

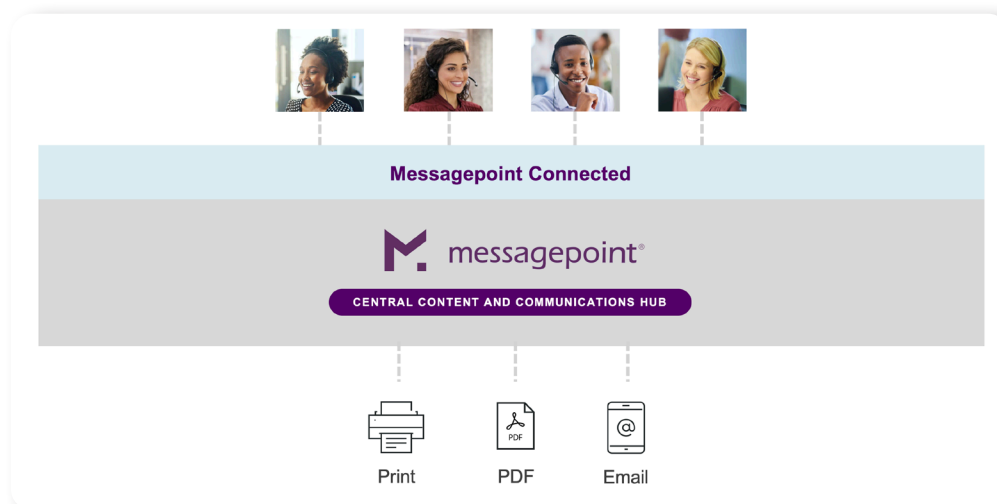
## Empower your front-office teams.

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.



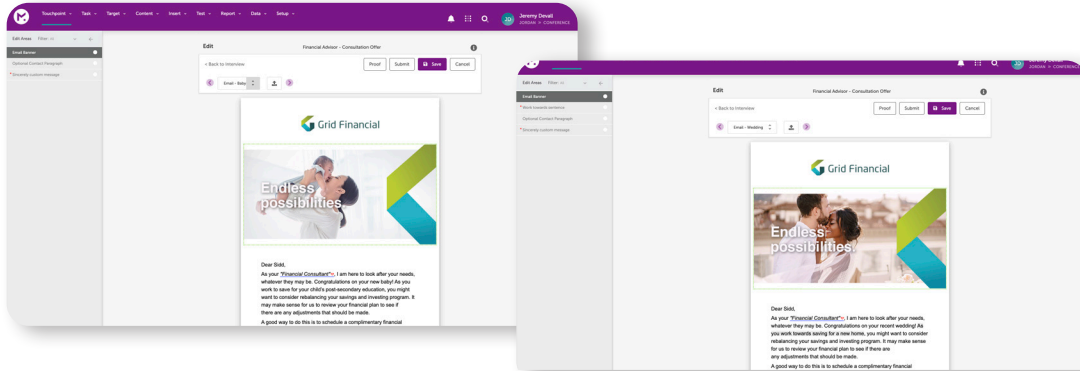
## Get centralized control.

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.

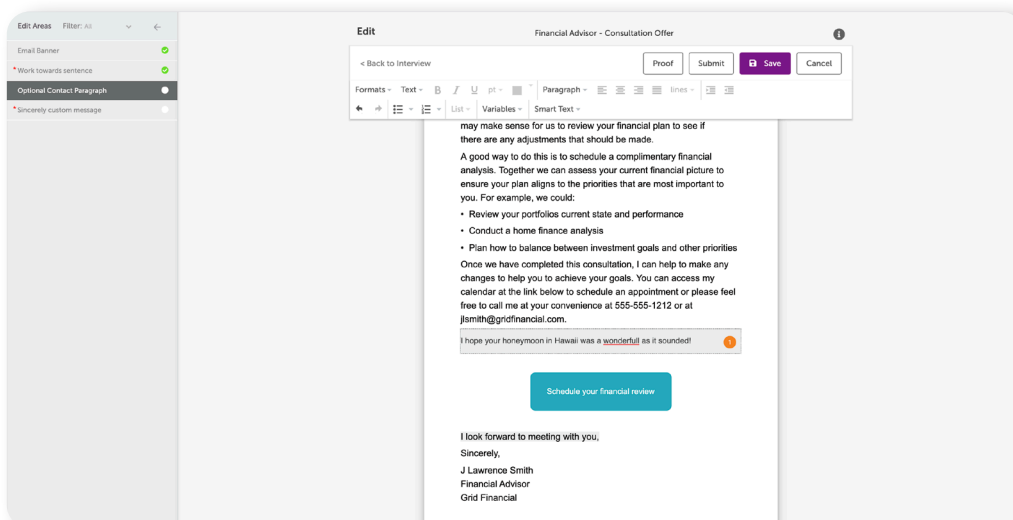
By sending communications with images, offers and messages that target specific customer demographics, needs and interests, or adding personalized notes through a controlled editing experience, your teams can truly fulfill that one-to-one experience that reduces customer turnover and enables upselling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

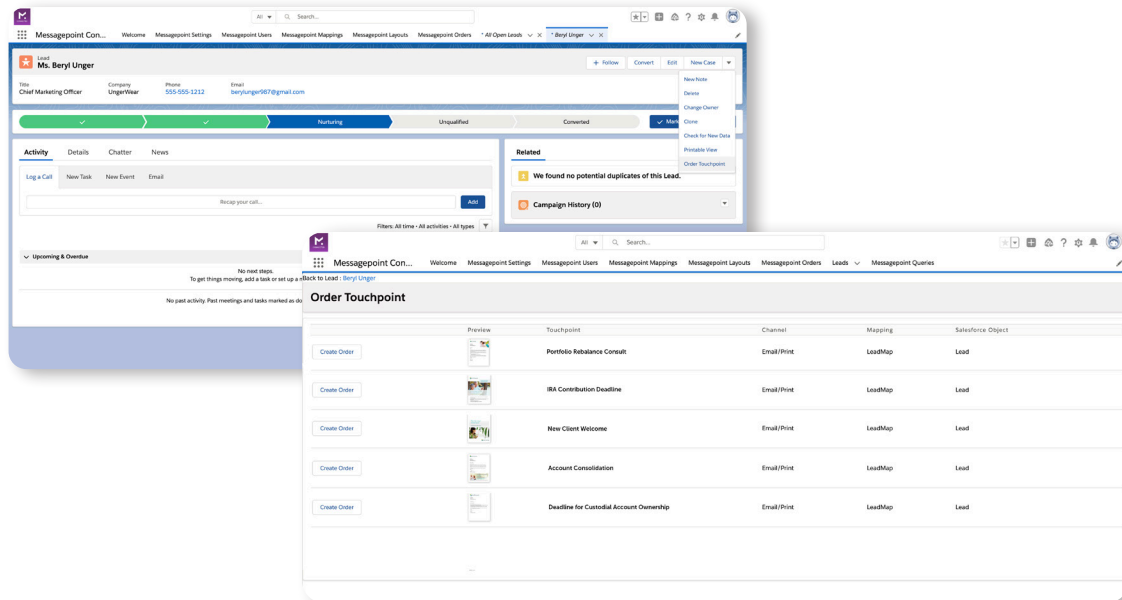
## Edit with real-time proofing.

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.

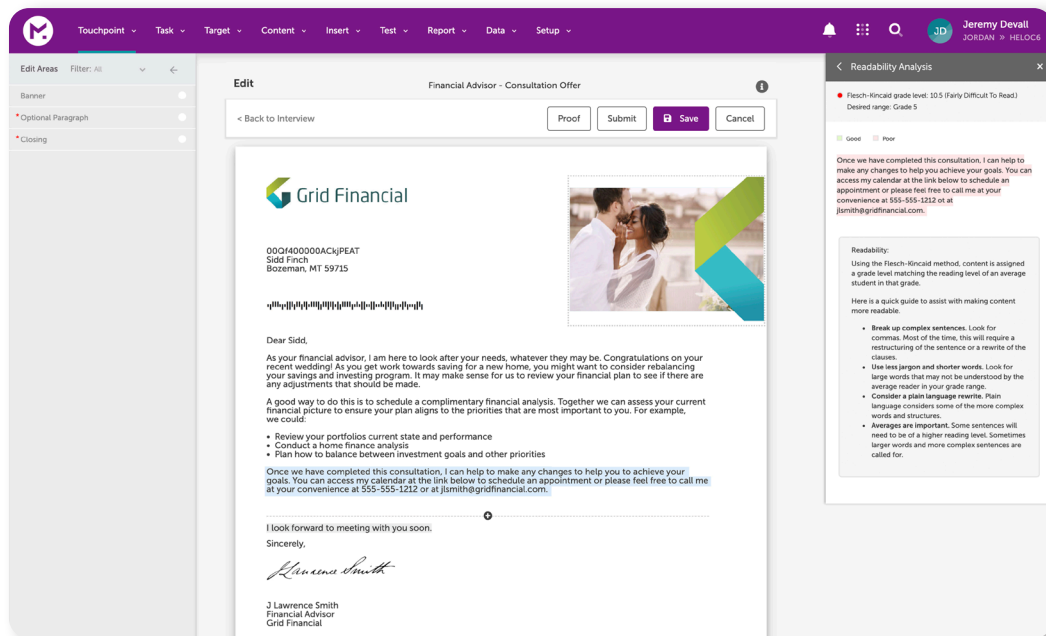


Work right from your customer account record in Salesforce to select, target, personalize and track the communication request.

## 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:

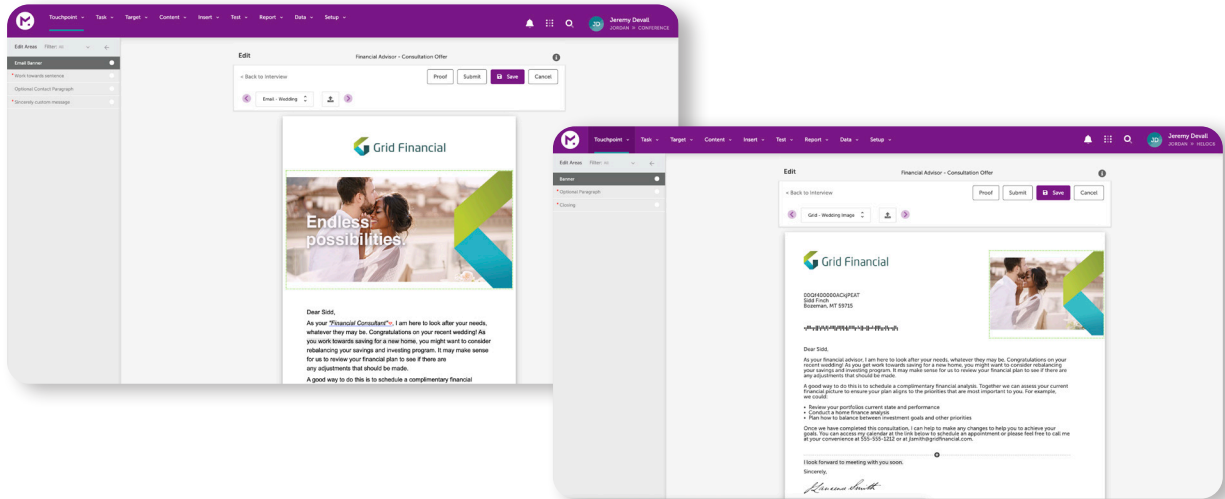
- Identify duplicate and similar content that already exists so you can reuse what's already there for increased consistency and efficiency
- Identify the sentiment of your messages so that you can evoke the right emotions from your customers to positively and consistently impact the customer experience 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





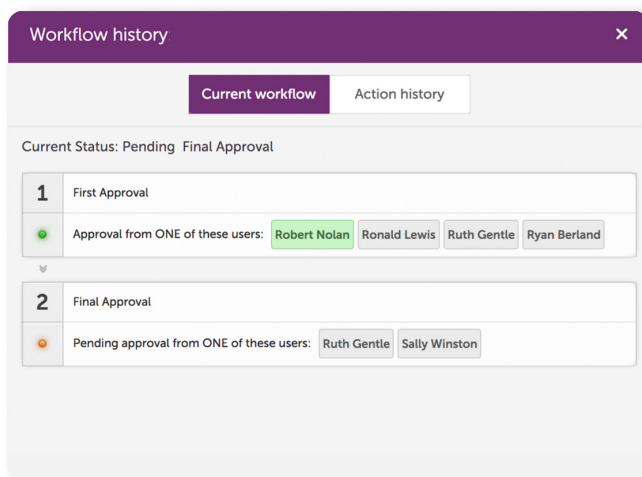
## Send communications how your customers want to receive them.

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

### 1 First Approval

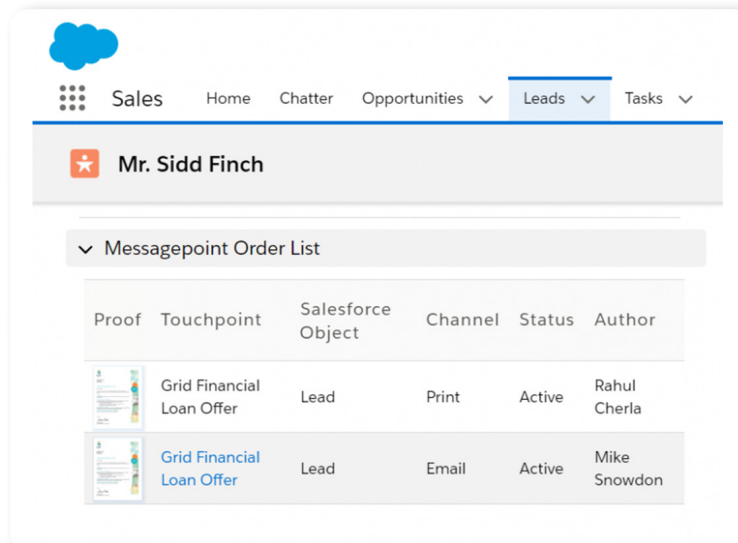
Approval from ONE of these users: Robert Nolan Ronald Lewis Ruth Gentle Ryan Berland

### 2 Final Approval

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.



## Messagepoint use cases



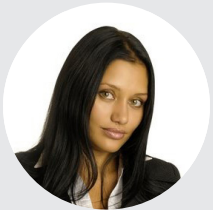
### Example 1:

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 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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