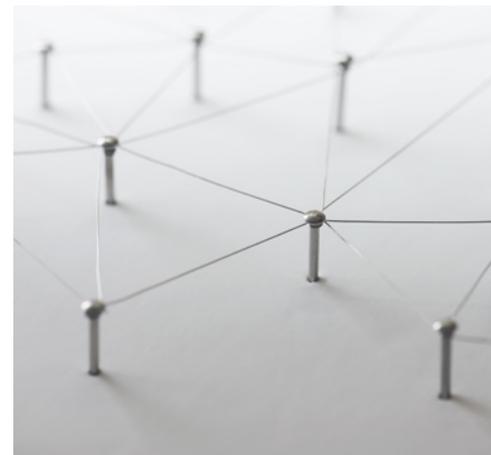**Broadridge**®

Designing Customer-Centric Communications

Use transactional documents to support a unified customer experience

Ready for Next

The most impactful customer communications are designed with the customer in mind: with a clear call to action, an attractive layout, and content that is easy to understand. The process of user centered design, which is most often applied to digital channels, uses specific techniques to create the best possible customer experience. But certain principles apply to all transactional communications regardless of channel—and with customers experiencing your brand in a variety of places, it's more important than ever to present a unified experience.

For this paper, we asked seasoned print and digital designers from Broadridge to share their best practices for designing customer-focused transactional communications that support a unified customer experience. Here's what they had to say.

FIRST, CONSULT YOUR CUSTOMERS

Customer research is critical. Too often, companies guess or assume what their customers want without actually asking them. Research can take many forms, ranging from surveys and focus groups to in-person user testing and observation.

Review call center data for design insights. This is a less expensive alternative to focus groups. Customers often complain about communications they can't understand, and they will use more than one channel to find the information they need, commonly called "channel escalation." Forrester estimates service costs associated with channel escalation at $22 million.[1] Your call center should be able to identify customers' top questions and complaints. You can then address them through your customer communications to help reduce call volume and channel escalation.

Learn how your customers read. Bills and statements aren't read in the same way as other documents. Typically, when reading English, we read from left to right. With printed bills and statements, our eyes tend to move in a zigzag pattern across the page: from top left to middle right to bottom left. However, you can influence eye movement by maintaining a strong hierarchy in your design—in essence, telling customers where to look and when.

Design collaboratively. Allow multiple stakeholders to participate in the design process by scheduling a webinar with the designer. He or she can design onscreen while customers and others give immediate feedback. This approach can save days of labor and review time.

RESPECT THE RULES OF GOOD DESIGN

White space is your friend. Many organizations try to include as much data as possible in their customer communications. This is especially true with financial statements. However, crowding the page with too much data can confuse the eye, causing frustration and fatigue. A good designer can help you find the right balance.

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[1] **Forrester Research, Inc. "Transform the Contact Center for Customer Service Excellence"**

Choose fonts for readability. Transactional communications must be designed to appeal to a very broad audience—which means fonts should be large enough and simple enough to be read by older readers and those with minor vision problems.

Use color wisely. Color can increase the impact of your communications because it engages the audience on an emotional level. But this can work for or against you. For instance, the color red is emotionally arousing and can provoke unpleasant emotions—particularly when it's used for numbers, where it signifies debt. Especially in the financial services market, customers tend to prefer bright, bold colors at the cooler end of the spectrum, such as green and blue.

Step away from the doodads. Used properly, icons, boxes, and rules can serve as visual cues to help guide customers through a communication. When overused, they can be a distraction and obscure the action you want customers to take.

UNIFY THE CUSTOMER EXPERIENCE

Consider the whole customer journey. Over the course of the customer journey, consumers will interact with you across many channels and touchpoints. They may jump from one channel to another during a single day. They may even experience your brand across multiple channels simultaneously—for instance, visiting your website while on the phone with your call center, or surfing your mobile site while at your local branch or retail outlet. By approaching the customer experience holistically through journey mapping and other techniques, you help to ensure that they move from one action to the next as quickly and efficiently as possible and that your brand is both recognizable and memorable.

A strong design hierarchy helps to direct eye movement so your messages get noticed.

Use language to guide action. Most consumers today are scanners, not readers. If they have to take time to interpret what you've said, chances are you've already lost them. Think of words as stepping stones on the customer journey. Be as clear and concise as possible: Use the active voice, a conversational tone, and simple language to move your customers where you want them to go.

Don't be afraid to repeat yourself. It goes almost without saying that your branding should remain consistent. Don't be afraid to repeat messages either: It takes 13 repetitions for a marketing message to sink in.[2] When you are getting tired of a call to action, customers are likely just beginning to notice it.
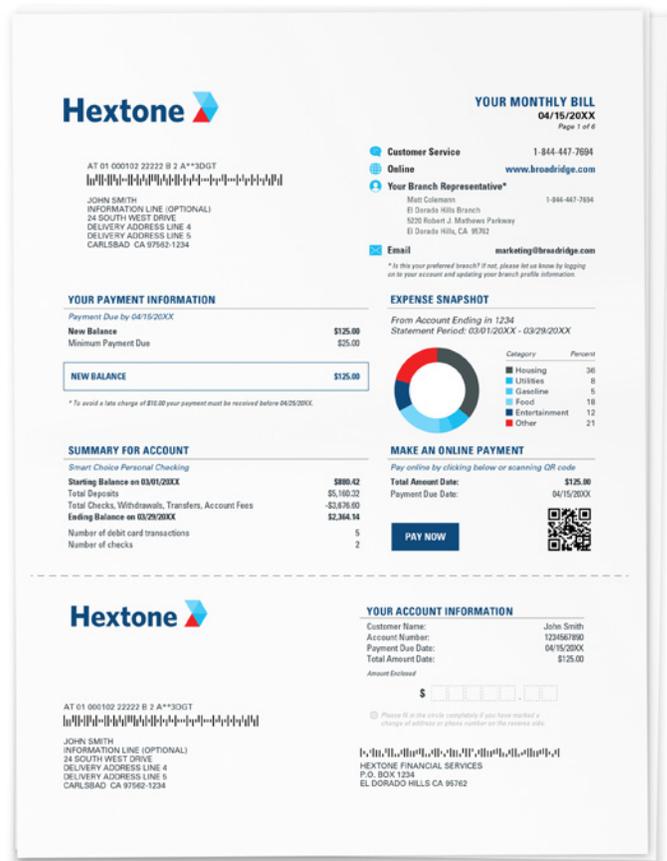
CONTACT US

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Our customer communications solutions transform how organizations communicate with their customers by creating an optimal, integrated digital and print experience. By seamlessly connecting customers with relevant content across the existing and emerging channels they prefer, your transactional, marketing and regulatory communications can drive greater efficiency, engagement and results.

Broadridge, a global fintech leader with $4 billion in revenue, provides communications, technology, data and analytics solutions. We help drive business transformation for our clients with solutions for enriching client engagement, navigating risk, optimizing efficiency and generating revenue growth.

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