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CRITICAL CUSTOMER COMMUNICATIONS
BEST PRACTICES

Introduction

Communication is key to any successful business operation. But in an emergency, effective communication is vital. Whether your business is consumer goods or commercial banking, healthcare or cloud-based services, keeping customers, partners and other stakeholders informed is imperative to compete in today's global landscape. Furthermore, communication reaches a pinnacle and becomes critical when things change, or more importantly, go wrong.

How will you notify your customers, employees, partners and other stakeholders at the time an IT incident occurs? What methods will you use to communicate important information about weather, outages, security or routine maintenance? How will you reach members of the response team to minimize the business and financial impact on your organization? How will you get the right message, to the right people, at the right time? The way you respond in time of crisis has serious and often unforgiving consequences in our global, well-connected society.

The solution for most businesses, both large and small, is a shared technology platform for critical customer communications. It provides an intelligent vehicle to ensure organizations are better prepared, can make informed decisions and respond quickly and confidently during disruptive events. But choosing the right platform amidst a cadre of options requires some due diligence.

In this paper, we will help you navigate the complex channel of critical customer communications and the solutions available as we discuss:

- What critical customer communications is and why it is important
- Who needs to be notified and why
- Best practices for critical customer communications success
- How to evaluate and select a critical customer communications platform

Common Types of Critical Customer Communications

- IT outages
- Power outages
- Emergency maintenance
- Data breach
- Service interruptions
- Routine maintenance updates

Critical Customer Communications:

WHAT IS IT, WHY IS IT IMPORTANT AND WHO NEEDS IT?

Simply put, critical customer communications is about getting the **right information** to the **right people** at the **right time**. This sounds easy in today's connected world, but in reality most communications methods are fraught with complications, impacting an organization's mean time to repair (MTTR) and ultimately its bottom line. The

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3 Core Communication Channels

1. **Response team**: Get the right people notified and communicating to fix outages—minimizes MTTR and financial impact
2. **Key executives & stakeholders**: Be in the know! Informed senior management facilitate proactive decision making.
3. **Key customers**: notify constituents impacted by outages—deliver exceptional customer service while minimizing call center payload

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moment a situation occurs, whether it is a planned IT maintenance update or an unexpected failure resulting from a natural disaster, what you say and how you act can be the difference between a positive outcome and all out chaos. It is important to ask yourself: do I have the procedures and mechanisms in place to systematically identify and deploy my response teams, inform my key executives and stakeholders and notify my customers to guarantee the best possible outcome in any situation?

How businesses communicate with customers everyday

Businesses engage with customers every day in a variety of ways to increase sales and assure satisfaction. Marketing organizations send email blasts and host webinars to communicate new product information, customer service organizations field calls, emails and online chats to help customers setup and operate products and services, and finance groups mail confidential loan documents to insure payments are made on time.

When it comes to critical communications, these businesses often rely on the same communication methods—email, voice, SMS text message, push notifications via a mobile device and printed documents sent via the postal service. While these methods may work fine for non-urgent purposes, there are serious weaknesses and potentially hazardous consequences when a company depends solely on these methods for all types of notifications. Email fatigue, unavailable communication paths and call trees with outdated contacts are just a few of the challenges organizations encounter every day.

The importance of critical customer communications

During a disruptive event, organizations need to do more than just broadcast a series of messages—they need to understand the situation and its risks, plan for response, overcome responder anxiety and gather feedback until the crisis is resolved. How an organization acts and communicates during an incident—whether it is a planned maintenance update, IT interruption due to weather or equipment failure or a safety alert for employees in the workplace—can critically impact the reputation of a business, for better or for worse.

There are three main constituents that businesses need to include in a strategic critical customer communications plan—employees/response team, key executives and stakeholders and customers. The ability to communicate with these three audiences in the most efficient way possible is crucial for a successful outcome and, as mentioned above, to decrease the mean time to resolution or repair.

First and foremost, you need to get the response team in place to start fixing the issue to minimize any financial impact the outage may have on your business as well as the customers' businesses. Next, key executives and stakeholders need to be brought into the mix to facilitate proactive decision making and to assure leaders are not caught off guard by press inquiries or other media sources. Finally, a well-crafted response and message plan communicated to affected customers provides consistency across all communications channels.

The benefits from a well-planned critical customer communications plan are plenty. Employees are better prepared to respond to situations quickly to minimize disruptive events. Executives are able to make better, informed decisions to minimize the impact to the organization, and informed customers can aid in the recovery process by providing real-time data to assist in resolution. Customer service calls will be minimized, eliminating the risk for call center overload, and ultimately retain customer loyalty.

Incident management escalation tiers
› Mean time to resolution is a good KPI
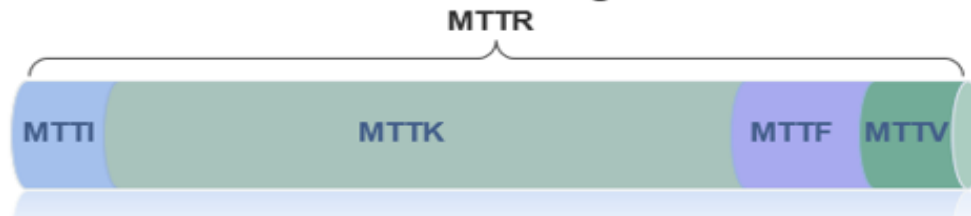
What is MTTR?
MTTR stands for mean time to resolution or repair and is comprised of four elements:

1. Mean Time to Identify (MTTI): The time it takes to detect an incident
2. Mean Time to Know (MTTK): Identify and reach the response teams necessary to collaborate and pinpoint the root cause
3. Mean Time to Fix (MTTF): The time it takes to implement the fix
4. Mean Time to Verify (MTTV): The time it takes to verify that the fix is working

Source: Balaouras, S., Forrester Research VP & Research Director, Security & Risk (2014). Webinar Slides: IT Incident and Disaster Alerting: Using Communication to Improve Response – Everbridge.com [online] Available at: http://www.everbridge.com/webinar-slides-incident-disaster-using-communication-improve-response/

Best Practices for Critical Customer Communications

Incorporate these best practices into your business strategy to minimize risk, protect stakeholders and effectively manage resources.

Develop and test a plan for clear customer communications. Different situations require different solutions. By incorporating a critical customer communication strategy into its operations, your organization can prepare for both planned and in-crisis communications, guide staff through notification, response, and in the case of crisis, disaster recovery.

Be flexible: expect the unexpected. Planning ahead allows your organization's leaders to anticipate notification scenarios, craft messages for event stages/types and match these messages to corresponding modes of communication. By using both message maps and on-the-fly messaging, organizations will expedite communications and optimize employee productivity.

Target the individual, not the device. Multimodal messaging is key to delivery success, as no single delivery path is ever 100% reliable worldwide. The more communication paths that are available, the more likely your customers and stakeholders will receive important information and updates. Targeting individuals guarantees the team responsible for fixing the problem can be alerted first, key executives are not caught by surprise and customers are informed.

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How Not to Handle a Crisis: The Case of XO Communications

With three major outages over a two-month period and reports of more than 21 hours of downtime, executives at XO Communications chose to put their heads in the sand and avoided communications with customers—no information on the company website, no update or status tweets, no email. Out of frustration, customers took to venting their annoyances on social media, as they were faced with 3-hour phone wait times for customer service and no response to web inquiries. The actions by XO Communications provided a case study in how not to treat your customers. Today, the company still suffers the backlash on social media outlets like Yelp and Twitter.

Source: Temin, D. (2013). How NOT to Handle A Crisis: XO Communications' Monumental Fail. [online] Forbes. Available at: http://www.forbes.com/sites/daviatemin/2013/09/07/how-not-to-handle-a-crisis-xo-communications-monumental-fail/

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Keep customers in the loop. The best way to manage customer complaints is to be proactive and remain visible during critical events. Misinformation can spread like wild fire on social media and escalate a situation, so maintaining a presence by posting pertinent information on the corporate Facebook and Twitter pages can quell rumors, improve trust and retain customer loyalty. An added benefit is a reduction in service calls, since customers know the company is addressing the issues.

Leverage two-way communications with situational intelligence. On-the-scene reporting lets you learn about an incident and relay updates to employees and target audience. Geo-location services, social media tools and polling notifications provide real-time insight to ensure resources are allocated correctly, and create a virtual network for collaboration and communication throughout an event's life cycle.

Host the critical customer communications service in the cloud.
When internal systems fail, an on premise notification system fails too. By hosting your critical customer communications platform via a cloud-based service provider, you safeguard delivery of your messages, since the leading providers maintain secure, redundant servers across the globe, guarantee uptime and provide 24x7 support.

Critical Customer Communications Vendor and Platform Criteria

Before you embark on the evaluation, selection and implementation process, it is important to understand the factors that make select vendors stand out from the rest. Additionally, it is important to navigate the web of specifications and industry jargon to recognize the relevant features that you should demand from any provider. The market consists of many vendors that meet the baseline criteria for supporting business operations, but understanding the subtleties of criteria related to critical customer communications directly will help you with due diligence as you choose the right solution for your organization.

Platform

Look for a single, hosted cloud-based platform delivered by a vendor recognized as a market leader by key industry analysts. The strength of a cloud-based offering, independent of any on-premise systems, cannot be overstated. It is imperative to have the ability to access and execute your critical customer communications procedures from anywhere, at any time, should your internal systems fail.

To fully evaluate providers, redundancy, backup availability statistics with a service-level agreement (SLA) and measuring scalability during peak conditions are crucial. Have a vendor demonstrate the levels of security, performance and availability of their system, and understand the costs of maintaining and scaling the system as your organization grows.

The right system should adapt to your organization and its communication needs, integrating well with your processes. While it is acceptable to streamline business processes as part of the implementation of a system, it does not make sense to compromise your practices to accommodate a system. The solution you select must be flexible enough to mimic your structure and needs, so that it is easy to use, easy to adopt, scales on demand and supports best practices within your organization.

Ease of use

To be effective, a critical customer communications application must be easy to deploy, implement and automatically activate on demand across a host of devices—mobile, email, SMS, push notifications to mobile apps, pager or landline—or, via vendor-provided operators. When considering any critical customer communications system, determine whether the average employee will be able to use the system with little or no training, or if the system will require a specialist. Many systems on the market are designed for technical users, so a novice may get tripped up within the menu structure.

As you evaluate systems, ask each potential vendor:

- How many clicks does it take to send a message?
- How many pages must be visited?
- How many clicks does it take to launch a pre-existing message?
- How many clicks does it take to select contacts on a map?
- How much training is required to get users up and running?

The system must be intuitive and simple as evaluated by the people who will be using it on an intermittent or day-to-day basis. A natural graphical user interface with sample templates for common scenarios will help you establish initial policies quickly to customize and prioritize communications groups. And, a central console for real-time monitoring of responses, coupled with two-way live communications and full audit trails simplifies tracking, responding and reporting of incidents.

Faster mobilization and improved collaboration between response teams can mean the difference between a positive outcome and an error that carries serious consequences.

Scalability

Businesses grow, so it is important that your critical customer communications infrastructure delivers capacity and elasticity to scale on demand, supporting your expanding user base both internally and externally.

Verify that your choice vendor is flexible enough to adapt to changing requirements over time. Look at the vendor's release cycle history to gauge system evolution. A vendor's history of release cycles should be reviewed as carefully as future plans. Past performance is a great indicator of future progress; a vendor with long gaps between release cycles will most likely provide the same in the future.

Availability

Industry-leading vendors invest in network infrastructure continuously and have redundant data centers worldwide. In addition, to guarantee availability and message delivery, these vendors have partnered with international telecommunications providers, and garnered the required licenses and certifications globally to ensure continuity of service.

When discussing system redundancy and availability, determine how vendors are making their systems redundant across multiple sites. Many vendors will say that they have several data centers across the United States or across the globe. However, this information is meaningless unless these separate facilities are sharing data with each other in a way that facilitates rapid failover if the primary site housing your system fails.

To provide a true no-single-point-of-failure system, every component of the system should be replicated. But often, vendors have specific points of failure they may not normally disclose. For example, it is not uncommon for the web interface for the application to be sourced out of a single facility. If that facility goes down, then customers are not going to be able to access the website, which means they won't have access to the system. Even though data may be replicated across multiple sites, all of that replication is meaningless until the vendor is able to restore web access at the failed facility.

Features

There are laundry lists of features and functionality that vendors may offer in an effort to secure a sale. Here are five key features for a dependable critical customer communications implementation:

- Multimodal support: landline, mobile, SMS, email, pager, mobile app
- Mobile application with two-way communication
- Reliable international message delivery (e.g., SMS delivery in India)
- Customer registration / Opt-In gives customers the ability to select what they would like to be contacted about (e.g., product recalls, system outages and more)
- Integrated GIS mapping and targeting

Training

Proper training is critical for any enterprise, large or small, when it comes to critical communications. You may find significant cost savings when you work with a vendor that provides a breadth of free, online training for users to develop core skills or brush up on concepts anytime. Many vendors also offer on-site training for a fee as well as certification programs, ideally suited to mid-size and larger organizations that need to train larger groups at one time.

Value

While buyers are looking to get the most "bang for the buck," choosing a critical customer communications platform based on price alone would be negligent. It is essential to assess the value-to-price ratio as you compare offerings. Leading vendors offer a variety of pricing packages that scale, depending on the number of users and product features you require. Cost is quoted per user, per month, and some suppliers require an annual contract to receive the quoted rate.

Summary

Critical customer communication is essential for the welfare of every organization. During a disruptive event, how your business acts and responds to customers, employees and other stakeholders can affect the likelihood that your business will survive and prosper in the aftermath.

As you develop a plan, it is important to clearly distinguish the three main constituents you need to speak to, and then determine the best methods for reaching each of them:

- **Response teams:** Who are the critical assets required to identify and resolve an incident

- **Key executives and stakeholders:** Who needs to be "in the know" to facilitate proactive decision-making

- **Major customers:** Who is affected by the incident and what do they need to know that demonstrates exceptional customer service and reduces call center payload

Next, recognize that the selection of a communication platform is a major decision that will impact your business operations for years to come. Proper understanding of best practices and knowledge of the competitive landscape is imperative to identifying a system that fulfills your communication needs.

Finally, whether you are responding to major events or managing routine incidents, choose a vendor that provides you with an intuitive, easy-to-use critical customer communications solution—with comprehensive training and a support network—to ensure users are up and running quickly, while delivering a quantifiable return on your investment.

About Everbridge

Everbridge provides a unified critical communication suite that helps clients be better prepared, make better decisions, and respond quickly and confidently during disruptive events. When an incident happens, whether it's a natural disaster or an IT service outage, we automate communications to ensure that the right messages get to the right people at the right time.

Widely recognized by analysts as the market leader, Everbridge solutions are trusted by clients in all major industries and government sectors to connect with over 50 million people around the world.

THE ONLY END-TO-END PLATFORM

- **Planning**: Everbridge is easy to set up, maintain, and organize, meaning that you're always ready for a quick, coordinated response. Everbridge ensures that the right messages get to the right people - with the most advanced opt-in portal on the market, streamlined integration with internal and external data sources, and simple group and contact management.

- **Assessment**: When trouble strikes, you need rich insight, presented simply - so you can quickly assess potential impact and make an informed decision to avoid loss. Everbridge offers the only solution on the market that meets these demanding requirements, with the most advanced interactive dashboard in the industry.

- **Response**: In critical situations, ease-of-use can mean the difference between an effective response and a mistake that carries serious consequences. Everbridge is engineered to be simple to use under pressure, with a user interface that accelerates time-to-message and reduces the likelihood of errors.

- **Delivery**: Even during large-scale disruptions, Everbridge stays on. The most advanced platform in the industry ensures that you reach your contacts - every time. And with worldwide coverage and capabilities, including globally local calling infrastructure and data storage, we're ready to support you wherever your people are in the world.

Visit www.everbridge.com to learn more.