What to look for in a CCM solution
Checklist

☐ **Online Dashboard**

Project tracking, insights and status

☐ **Batch, On-demand and interactive document composition**

Ability to produce a batch of high volume, personalized documents, a single document based on triggers and a document that can be tailored by a non-technical user

☐ **Customizable and Intuitive Environment**

Application or online environment designed for the business user to create templates

☐ **Asset Referencing and Content Sharing**

Ability for template authors to locate and share objects, like copy or logos, across templates

☐ **Automated Version Management**

Ability to automate the tracking of template changes, collaboration and restore previous versions.

☐ **Complex Data Presentation**

Ability to add advanced tables, charts and graphs to communications

☐ **Complex Document Support**

Ability to generate data-driven table of contents, automatically number sections and sub-sections, automatically generate index and create internal and external bookmarks

☐ **Output and Proofing**

Support print as output channel, create responsive HTML output to automatically resize based on device, preview or proof across devices and popular email clients

☐ **Omnichannel Delivery**

Ability to send communications via print, email, text message, social media, WhatsApp, website, mobile app or customer portal

☐ **Collaboration**

Ability to work simultaneously and share communications for review, modification, comments and approval

☐ **Personalization**

Ability to use normal language for building business rules

☐ **Compliance**

Approval system to manage, track, audit, annotate and approve regulatory content with the ability to lock content

☐ **Testing**

Test data management, data editing, data capture and automated regression testing

☐ **Highly Interactive**

Ability to create personalized videos, interactive forms, charts and graphs, live calculators, integration to chatbot and payment gateway and AI-driven voice query

☐ **Process Management**

Visual workflow builder to build workflows, setup triggers and notifications

☐ **Support**

24-hour online and phone customer support

☐ **Training**

On-site and online training with online educational resources

☐ **Integration**

Ability to integrate with core administration systems, legacy systems or any 3rd party system

☐ **Cloud-Based**

Flexible, scalable and simplistic software hosted in the cloud with on premise options

☐ **SaaS Pricing**

Flexible subscription-based pricing with maintenance and upgrades included

☐ **Implementation Services**

Packages to deliver implementation and content development services

☐ **Unlimited Access**

Unlimited users, templates and communications

☐ **ISO Libraries**

Pre-configured templates