belwo

Cheat sheet for
REFACTORING A CCM PLATFORM

Software refactoring or rearchitecting is a program transformation that restructures existing code without altering its behavior. It is a critical practice in popular software design movements. It can involve writing new code, modifying an existing code or combining both, which can speed up development, reduce maintenance costs and improve performance. Software refactoring can be done in various ways, depending on the specific needs.

In the scheme of more prominent projects, companies often ignore CCM refactoring, which can directly impact your customer experience (CX). According to a recent study, customer experience will overtake price and product as key brand differentiators and companies that prioritize customer experience will see revenue growth of 4–8% above industry averages. Customer experience trends are shaping every day. By refactoring the CCM platform, businesses can better engage with customers.

When is a refactoring of a CCM platform needed?

It is necessary in the event of the following:

- Secondary files and new output channels are not supported

- Presence of multiple coding modules along with an incorrect data structure

- Incompatibility with complex business rules and inability to adapt to evolving customer behavior

- Difficulty in altering design statements, such as charts and tabs.

- Discontinuation of service support and updates

- Existence of numerous disparate templates

- Absence of standard logic/libraries

- Inclusion of redundant objects in the workflow diagram

Things to consider when refactoring

Scalability

Your CCM platform should be able to provide the necessary functionality to support business changes.

Omnichannel capabilities

Your CCM platform should be able to reinvent customer experiences and meet any future expectations of customers by delivering personalized, content-rich communications that tap into various cross and up-sell opportunities across e-mail, SMS, web, print and other channels.

Quick turnaround time

Refactoring increases efficiency. Systems respond more rapidly to a refactored code, resulting in quick turnarounds. As a result, businesses can expect a significantly improved end-user experience.
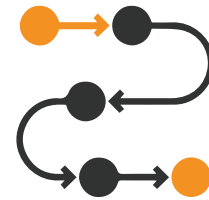
Cost efficiency

Understanding and implementing new features is quicker with clean and straightforward code. On the other hand, outdated platforms take a long time to upgrade or extend the application. In addition, if there are problems with the code, the company will need to spend more money to resolve them.

Easy maintenance

The main goal of code refactoring is to simplify code maintenance. It enables the hassle-free addition of essential updates and upgrades.

Steps to follow to refactor your CCM platform

🔍 Discover

- [ ] Analyze current setup and additional features that should be present
- [ ] Identify current set-up for its challenges and performance
- [ ] Perceive CX requirements
- [ ] Determine the cost of implementing new features/channels in the existing platform
- [ ] Ascertain the operational cost

👍 Recommend

- [ ] Consider a possible updated version
- [ ] Identify the best-suited CCM platforms for robust performance and scalability
- [ ] Assimilate the team based on the necessary skillset
- [ ] Decide on the best methodology for the client
- [ ] Propose the Costing and licensing options

⚙️ Implement

- [ ] Evaluate KPIs on implementation and maintenance of the new setup
- [ ] Create a timeline for the project
- [ ] Create a business requirement document (BRD) if not provided
- [ ] Standardize data and design enabling plug-and-play of new designs/templates
- [ ] Automate the setup so all the programs will run without manual intervention

🤲 Deliver

- [ ] Run QA testing to ensure documents are bug-free
- [ ] Share the samples for approval

Benefits of refactoring your CCM

Enhanced business agility

Refactoring can add features according to market demand to affect the communication chain.

Better security monitoring

Monitoring data requires a massive effort, especially with old architecture. However, refactoring can help you overcome security threats.

Improved resilience

Refactoring your CCM can improve the resilience of systems by breaking them down into independent services. Refactoring also enhances the system's stability without affecting the chain of communication.

Intuitive structure

Anyone without a technical background can quickly and easily create any new document they need.

Positive impact on CX

CX can be improved by including platforms like the pay now button, change address links, digital signature, display links, KYC and document upload. Customers can access multiple documents like e-statements, archive data, and ADA compliance documents.

Whether it's due to changes in user, industry or technology needs, CCM refactoring will continue to evolve. An intelligent approach to CCM refactoring lays a solid foundation for a better CX. If you are ready to start on the path to modernizing your CCM with a practical approach, you will need proper planning and the right people on your team to put you on the way to success. The development team should have experience working with complex environments and modernizing CCM platforms, so your process for refactoring CCM is on the path to winning by having a conversation with our development team today.

About BelWo

BelWo develops, deploys and manages Customer Communications Management (CCM) solutions for enterprises and print service providers worldwide. As a solutions-focused partner with deep expertise in CCM, enterprises turn to us to support complex CCM initiatives that range from smaller-scale document applications to full-scale omnichannel digital experiences. Our mission is to help our clients meet strategic CCM goals, add value to every customer communication, reduce costs and improve the workflows of mission-critical CCM processes.

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