



| MERRILL CONNECT®
DIGITAL ENGAGEMENT

6 Things to Consider when Transitioning Your Regulated Communications to Digital

Digital transformations are top of mind for many industries, and with changing regulations and evolving standards even more companies are starting to take note. As you start to determine what a successful transition entails for a company within a regulated industry, it is important that you don't compromise accessibility and compliance when moving any programs to digital. The opportunity to create positive digital experiences for your customers can be overwhelming, but starting with these six considerations will provide you with a foundation for success.



1. Obtain User Consent

Digital transformation starts with consent from your users. Obtaining consent for digital communications should be at the heart of everything you do; every phone call into customer service, every direct mail, every interaction, ask them to login and setup their preferences. Just as important as gaining consent is the ability to easily manage the consent across your organization. Utilizing an integrated system to manage preferences by product and by communication type is key in remaining compliant and providing ease of use for users.





2. Provide Easy Access

When users consent to receive digital communications, they expect seamless convenience to access their documents. When driving customers to your website for their communications, make sure you understand the Three-Click Rule when it comes to accessing important documents. The Three-Click Rule suggests that users should be able to find any information within a website using no more than three mouse clicks. This reduces frustration and ensures a positive online experience.



3. Make an Impression

While your words are important in client communications, what people pay attention to in the digital world are the visual cues and engaging content. Don't underestimate the power of video or interactive tools to tell your story and get noticed. Utilizing omni-channel marketing and personalized microsites provides an opportunity to increase engagement, build confidence and maintain trust while creating a customer for life.



4. Create a Positive Experience

Have you ever had to page through a lengthy PDF to find a simple answer to your question or hunt and peck through a large website full of content? Not an easy feat! Frustrations finding content could lead to costly phone calls into customer service or customers leaving the site without finding the information they need. Instead allow users to quickly and easily find what they are looking for by utilizing focused microsites with robust search capabilities and personalized content.



5. Find a Balance

Even though the percentage of users engaged digitally continues to rise, you will still have some your clients that prefer paper. Making the decision to go completely digital regardless of a user's delivery preferences, could negatively impact your overall customer satisfaction. It's important to give your users the option to choose how they want to receive their communications; whether that means email, print or text. This allows you to not only positively impact customer satisfaction, but also reduces your risk of compliance errors.



6. Ensure Expertise and Security

Regardless if it's print or digital, client communications are a multi-dimensional process that requires expertise well beyond standard digital marketing capabilities. Finding a partner who understands the regulations and ensures complete security around all your communications is critical. Remove the risk of compliance errors and safeguard against any security risks by working with a partner that provides digital and print capabilities through a highly secure integrated solution.

Merrill's innovative single-source platform, Merrill Connect® facilitates seamless transitions from print to electronic communications, allowing clients to leverage secure, omni-channel solutions as regulations, markets and members evolve. Connect with us today to find out how we can help you in your digital journey.

Merrill Corporation secures solutions at every phase, so you can secure ongoing impact and growth.

To learn more about our life cycle of regulated business communication solutions, please connect with us.

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