



Ernie's Corner



Despite a tumultuous situation in the world's markets, here at CrawfordTech we have been fortunate to have had a tremendous year in 2008. As you may have seen from our latest press release regarding our year-end, we exceeded our goal of 40% growth, and are already looking at some big wins in 2009 both in North America and in Europe (see [Crawford Technologies Inc. Announces Year End Results for Fiscal 2008](#)).

With the market situation in mind, many companies are looking to extract maximum value from their transactional customer communications, and implement solutions that will not only save money, but will enable them to more accurately forecast financial and other resource requirements. In line with that expectation, we are excited about our Enterprise IMB® product family, and you can find out more about it in our VP Product Management Stephen Poe's IMB discussion paper.

In these challenging times, many organizations are turning to TransPromo technology to reduce costs and achieve many business benefits. Industry stalwarts Pat McGrew and Toby Cobrin provide their insightful and entertaining views on Transpromo communications. Our award winning PRO Document Enhancer product is fast becoming the solution of choice for organizations wanting to move legacy print applications to TransPromo quickly and cost-effectively. The Technology Spotlight on PRO Document Enhancer shows you how it can be used to save money and improve your customer communications at the same time.

Upcoming Events

Please look for us at these upcoming events:

Xplor 2009, March 4-7, 2009, TradeWinds Hotel and Conference Center in Tampa Bay, FL, USA

We will be at booth #20. Don Maxwell and I will be on the Print Stream Shoot-Out panel while Stephen Poe will be chairing the Data Technology Forum. As well, Michael Crawford will be speaking on making transactional documents accessible to sight challenged and blind people.

AIIIM/On Demand, March 30 - April 3, 2009, Pennsylvania Convention Center in Philadelphia, PA, USA

We will be at booth #1755. Our valued customer Laurence Shaw, senior Solutions Architect with Salmat Australia, will be presenting a case study regarding his use of Crawford Technology solutions to successfully execute upon customer communications strategies for Salmat's major clients in the financial and government markets.

To see what shows we'll be attending, please visit our [Events](#) page.

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Feedback

We look forward to your feedback. If you'd like to see an article on a specific subject, make a comment, or just want to let us know what you think of our newsletter, please email me at ernie@crawfordtech.com

Technology Spotlight: PRO Document Enhancer

The award-winning PRO Document Enhancer, now in version 3.6, addresses the most common document re-engineering barriers. PRO Document Enhancer enables color applications and transpromo strategies without application redesign or a return to the composition stage. With PRO Document Enhancer, our customers cost-effectively leverage the existing white space and/or merge incremental pages with relevant marketing messages and images at the print stream level.

Traditionally, cost-effective, timely changes and maintenance of critical customer communication applications has been problematic. Companies often lack the resources, the ability, or the will to enhance legacy programs and mainframe-based applications and subsystems. Newer line of business projects frequently need tweaking when the time or personnel are not available to make the required composition engine changes. Consequently, upstream application updates and modifications are placed at the bottom of the "to-do" list or overlooked entirely. As a result, marketing imperatives will take a back seat to the technological resourcing associated with application redesign. Time crunches also mean that re-composition is not a viable option. This is the "perfect storm" for document re-engineering at the print stream level. These changes become relatively quick and painless with PRO Document Enhancer.

Regardless of delivery channel - hardcopy or electronically delivered documents - PRO Document Enhancer is designed to streamline the production process for our corporate, government and service bureau clients. By eliminating the need for expensive and time-consuming upstream application reprogramming or re-composition of transactional customer communications, PRO Document Enhancer enables our customers to take advantage of the existing white space, merging incremental pages and adding color. For several of our clients, PRO Document Enhancer plays a key role in the execution of a cost-effective transpromo strategy, and supports operational, service, marketing, legal and standards requirements.

PRO Document Enhancer supports the widest variety of input print streams including AFP, PostScript, PDF, PCL and Xerox LCDS/Metacode. Support has been added for the addition of 2D barcodes such as DataMatrix, PDF417 and the USPS Intelligent Mail® barcode, permitting users to take advantage of this technology without rewriting their applications. PRO Document Enhancer is also integrated with CrawfordTech's [Enterprise IMB® family of products](#) for a quick and seamless implementation.

FacinPRO Document Enhancer can run as a standalone system to add value to print streams and output the results in the same format (e.g. AFP in to AFP out) or it can be configured to run with the CrawfordTech [PRO Transform Suite](#) to output a different print stream format (e.g. AFP in to PDF out) in a single pass. In either configuration, existing print streams can be modified to meet new requirements with no need to modify source code.

The PRO Document Enhancer supports the [PRO Indexer](#), [PRO Splitter](#) and the [PRO Concatenator](#) optional components, extending its capabilities even further with the introduction of a powerful new if/then/else scripting language to support the most complex applications and requirements. PRO Document Enhancer can also interface with most postal optimization software.



Having been awarded the [Xplor Innovator of the Year for Document Re-engineering](#), PRO Document Enhancer aligns with the industry's demand to cost-effectively and efficiently manipulate existing white space and maximize inserts without application redesign or composition changes. PRO Document Enhancer provides a critical bridge between having make changes to the legacy application and the reality of having to make rapid, focused changes in realistic time frames and within tight budgets. With PRO Document Enhancer, our clients are maximizing their print streams to get the right messages to the right customers at the right time.

Transactional Printing: Reinventing Itself

- Toby Cobrin

Highlight and full-color transactional output has made a noticeable jump from about 5% to more than one-quarter of the impressions produced; 47% of color transactional output is used for "transpromo" applications.

With an unpredictable economic market, a consolidation of the corporate environment, and electronic alternatives knocking at the door, transactional printing definitely has a few challenges to overcome in 2009. But on the brighter side, innovative technology advances are helping to make these applications more cost effective, and market savvy. INTERQUEST has followed the transactional market for the past decade and although there are definitely some challenges, opportunities also abound. In 2008 INTERQUEST released a study based on in-depth interviews with 50 leading transactional printing providers in North America. This group of print providers has been interviewed every few years to track the development of market trends relating to transactional printing. The respondents are divided between commercial and in-house operations. In sum their transactional output accounts for nearly one-third of the total transactional impressions produced on digital production equipment in North America.

Respondents are cautious but positive about the future of transactional printing especially in a number of key areas. Two of these areas of growth are in color and cross-marketing utilization.

Highlight and full-color transactional output has made a noticeable jump in volume over the past four years, increasing from about 5% to more than one-quarter of the impressions produced by survey respondents. But the news is mixed since a few large suppliers have generated most of the growth. Nearly half of the corporate providers and 26% of the commercial transactional operations still get by without color equipment.

Cross selling, up-selling and increasing customer loyalty and longevity are just a few of the benefits to be derived by using the transactional statement for promotional purposes. Respondents tell us that 47% of their color transactional output is used for "transpromo" applications and is steadily growing. Other uses for color are in the elimination of pre-printed forms (25%) and the use of color in database-driven full color charts and graphics (27%).

Many of the respondents interviewed were optimistic about the transactional printing market and reinventing their applications to take advantage of new technologies both in hardware and software. INTERQUEST believes the next three to five years will prove to be critical. By then we should have a clearer picture of how well transactional printing can cope with electronic media and how the transition to color will impact the transactional marketplace.

Toby Cobrin is a director at INTERQUEST, a leading market research firm in electronic printing and publishing. For more information on the North American Transactional Printing: Market Analysis & Forecast (2007-2012), visit <http://www.inter-quest.com> or call 434-979-9945.

Challenges in Implementing IMB: Unique IDs

- Stephen D. Poe

Implementing IMB is more involved than simply replacing your existing POSTNET and PLANET barcodes.

This article is part of an ongoing series devoted to discussing the technical and business issues surrounding the successful implementation of IMB.

2009 is here, and companies must grapple with the reality of implementing Intelligent Mail Barcodes this year. When mapping your strategy, it is helpful to examine important challenges you should consider in your IMB migration efforts. A little bit of planning today will pay dividends later in terms of reduced implementation costs, increased postal saving, improvements in document production, and the establishment of advanced business processes across your enterprise.

Moving to IMB

Implementing IMB is more involved than simply replacing your existing POSTNET and PLANET barcodes. In order to receive the maximum postal discounts offered by the USPS, as well as build best practices utilizing the new IMB's, several technical challenges must be met. The first such challenge is that a unique identifier must be assigned to each mail piece. While at first blush, this may seem like a relatively straightforward process, assigning and managing unique identifiers becomes increasingly difficult depending on the number of applications involved and the diversity of document composition tools that exist in your environment.

Three Challenges with Unique IDs

Implementing IMB is a complex effort that requires changes to major systems and processes, especially as the advanced benefits of IMB are leveraged enterprise-wide. A recent study reports that although 94 percent of all companies surveyed plan to move to IMB, most - 76 percent - had not yet started their implementation efforts. And those organizations that have begun to move forward find that the administration of unique IDs is more difficult than they originally thought.

Overcoming Multiple Applications

An organization with a limited number of applications in relatively low volume production may find that doing things "the old fashioned" way with manual processes or customized programming is a viable option. However, if your organization has multiple lines of business producing millions of documents each month, the generation of unique identifiers - and maintaining the uniqueness of each over time - soon becomes overwhelmingly complex. One option is to establish a separate mailer ID for each application within each line of business with each line of business maintaining only one set of identifiers. But as the number of applications grows so does the number of mailer ID's used in your environment. While this may have limited possibilities as a workaround, the USPS is strongly discouraging this approach. As a result, organizations find that establishing a centralized server dedicated to IMB administration is the only practical alternative.

Overcoming Multiple Documents Environments

High volume transactional documents can come from a variety of document composition environments, and while some organizations may utilize a single approach, the reality is that your environment likely employs a variety of legacy applications and document composition tools, each with its own specific role and application suite. When you include other critical utilities like CASS/PAVE, dealing with each document environment becomes a daunting task that requires increased support, reprogramming, testing, and implementation.

Service bureaus are particularly challenged to implement IMB in their environment due to the wide variety of applications they must manage from multiple sources, and the fact that they generally receive print-ready jobs in finalized format. For these organizations, employing a centralized server, called by API's in a post-composition process, is most often the only viable approach.

Overcoming Customized IMB Attributes

The USPS provides the highest level of postal discounts to those organizations that adopt a unique ID approach. The good news is that this allows you to save money on postage above what was available using POSTNET and PLANET barcodes. The bad news is that an additional level of complexity must be overcome as mailers are required to ensure that each ID number remains unique and un-duplicated for at least a 45 day period. If you have special applications that require longer customized time periods - tracking the response to a transpromotional campaign over a three month timeframe, for example - keeping these unique identifiers straight is hardly straightforward. Many companies employ a centralized server to administer the IDs to simplify the process.

Implementing IMB and Unique Identifiers

CrawfordTech's Enterprise IMB® Unique ID Generator product provides a solution to organizations needing to run Unique ID creation and management across multiple lines of business, applications, and across platforms. Its single central server architecture is coupled with an easy-to-use API that allows each different application to ask for and receive IMB Unique IDs. This solves the problem of creating, tracking and managing IMB Unique IDs across your entire document production environment and enterprise. Our Enterprise IMB® Unique ID Generator is part of CrawfordTech's Enterprise IMB® product family designed to assist you in successfully completing a full IMB implementation that is integrated with your existing document and production environment.

Steps Forward

Organizations that process high volumes of transactional documents must find a solution to establish unique identifiers for each document within each line of business application regardless of whether the documents come from a legacy mainframe, a document composition tool, or distributed platform environment. More importantly, these unique identifiers must be generated and managed simultaneously across hundreds of different document generating applications, both legacy and document composition systems, in real time so as to not impact production, and potentially across multiple platforms and operating systems. This can be accomplished by programming a utility from scratch but internal resources to modify systems and tools are often hard to come by. As a result, many organizations now find that they are behind the curve in their IMB efforts. For this reason, companies often look to external third-party providers as a way to ease the transition. Either way, by examining these challenges ahead of time you will be in a better position to be prepared for IMB conversion and take advantage of the many benefits available.



For an educational presentation on the four stages of IMB implementation, click the image above.

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ADF 2.0 - What Does It Mean to High Volume Producers ?

- Mike Porter

CrawfordTech is rated "positive" by Gartner in its Automated Document Factory 2.0 Software report

ADF is in the news again - not that it has ever really been far out of the consciousness of high volume document operations professionals. Since the early 1990's the concepts that were eventually collected under the expression "Automated Document Factory" by the Gartner Group in 1996 have been implemented in organizations around the world.

Original ADF specifications covered the workflow that was typical at the time and the production focus was on legacy batch applications. The emphasis was on tracking documents throughout the printing and post-printing processes, automating control, monitoring the production floor, and reporting. The ideal ADF called for these functions to be integrated throughout the entire process.

The latest developments in the document business, namely Transpromo and closed-loop response management, have driven a change in perspective on ADF, however, and have prompted Gartner to craft a new definition. The new classification is now known as "ADF 2.0."

ADF 2.0 includes all the original components, and they are still as important today as they were in 1996. But as technology has evolved to allow us to compose and print highly personalized documents, and as our desires have grown to include the use of customer response and behavior to affect future messaging, ADF 2.0 has evolved to provide additional structure in the print and mail operation.

A Need for More Control

CrawfordTech's product families interface with each other and other vendors' products, to easily integrate into any organization's existing ADF infrastructure.

It is no longer sufficient to simply ensure that every document gets printed, inserted, and mailed. Organizations now strive toward the ability to confirm that each customer has actually received the appropriate message. Not only that, companies that embrace ADF 2.0 also take great care that each message considers the overall customer relationship and is consistent across all communication channels. The result is an entirely new level of complexity and control that must be considered and overcome in order to reap the benefits.

These requirements may indeed be achieved by organizations designing a brand new document processing center or newly minted print applications that include all of the interconnectivity of systems and data that are necessary, but an alternative approach is necessary for organizations aiming to optimize and improve their existing operations. Document re-engineering - post composition - is needed to make truly meaningful improvements. At Print/Mail Consultants, we've always advised our clients to pick those elements of ADF that provide the most benefit for them and work those aspects into existing processes. The same strategy exists for ADF 2.0.

Re-engineer What You Have

The information that is needed to create highly targeted documents comes from multiple, independently managed sources. As a result, the only place in the organization where the individual parts are assembled is at document composition time. But making enterprise-wide application changes at this phase can be expensive, time consuming, and drain already stretched programming resources. As a result, companies can benefit from utilizing post-composition document re-engineering software, like that offered by Crawford Technologies, which allow them to extract the data that already exists in the documents created within the existing process. This data can then be used to match up with the additional data necessary to create new personalized documents.

Document re-engineering software is also an excellent tool for creating the first version of what will eventually become a comprehensive customer communications database. Data from outside sources, feedback from individual customers, channel preferences, and buying habit information can be added to this database which will then used to create increasingly relevant and targeted customer communications.

The truth is that a full-blown ADF 2.0 environment is not practical or achievable for most shops. Nor is it always absolutely necessary. But as companies move toward extreme personalization, superior control and validation is essential. Producers of direct mail, Transpromo statements, or other complex documents need to find the best way for them to achieve a raised level of quality. For many, the benefits provided by document re-engineering software offer a viable way to achieve this objective.

Mike Porter is President of Print/Mail Consultants, an independent consulting firm that helps companies nationwide be more productive, adapt to changing requirements, and lower costs in their document operations. He is the author of, "Take This Job and Stuff It! A Practical Guide for Document Operations Managers".

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Communicate or I Will Call You!

- Pat McGrew

Transpromo communication does not have to be one-to-one communication. Instead, it can just be those other things: timely, relevant, targeted, and well designed.

There has been a lot of buzz lately about "Transpromo" communication. But in the face of the hype and the hubbub I have a challenge. I contend that good, targeted, personalized, relevant communication does not have to be one-to-one communication. Instead, it can just be those other things: timely, relevant, targeted, and well designed.

Let's take it a step farther. What happens if you actually follow through and create more relevant communication? What happens if you update the look of both the essential communication, like bills and statements, and customer care communication like direct mail? Oddly, it may save you money!

First, take that look at your customer communication. In my last article for the Crawford Courier *Are you talking to me?*, I gave hints on the things to look at and why. The take-away from that article should have been that to get the most value from me as a customer you should be delving into who I am, how I spend with you, and how I pay. There is a lot to learn and a lot to use, but you don't have to use every tidbit. Grab the data and understand the trends to get started!

The other thing to do is to take a hard look at how easy you make it for customers to get answers to their questions. The best thing you can do is to ensure that the information you provide is easy to read and understand, in an easy to read type size, and in a location that makes sense. You can go a long way by eliminating information they can never use, like reference or tracking numbers used internally but not relevant when they call the call center.

Speaking of the call center, do you know how much it costs to handle an inbound call? Many people have no idea. Someone in the company does because they are paying the bills, but often there isn't a company-wide understanding that every time a customer picks up a phone and rings into the free phone number, it costs the company money. And it may be significant in terms of costs. In the financial services industry the cost of a call through the call center can approach \$250USD. Even if your cost per call is in the \$12 or \$15USD range, every call costs money! Think about the number of customers you have and look at your current call center costs. How many of those calls are handled in under five minutes? Those calls tend to be quick information calls asking where to send a payment or what something on the bill means.

Think about the number of customers you have and look at your current call center costs. How many of those calls are handled in under five minutes? Those calls tend to be quick information calls asking where to send a payment or what something on the bill means.

Caller: "It says I bought a Ziggurat5000, but I don't own one. The reference number is 59723890478CCD. "

Call Center: "Sir, I don't have access to reference numbers but my system says that a Ziggurat5000 is a motorized bulb planter. We show you bought it at the same time as the snow shovel."

Caller: "Why doesn't it just say bulb planter?"

Call Center: "The product name is provided by our supplier. Can I help with anything else?"

Caller: "No, thank you."

Sounds familiar? Imagine if the billing statement eliminated the reference number and added a better description? In truth, reworking the system to eliminate unneeded information on the bill may be a bit trickier than it sounds, but it can help you cross the bridge to more effective customer communication.

If you can, consider these steps toward reducing the number of calls into the call center:

Reality-Check: What are the metrics on your current calls? Do you have a baseline? Do you know why people call your call center? Of the things they call about, what can you impact with a better statement design? You need a baseline to measure success!

Appropriate Granularity: Is the information on the bill or statement usable by the customer? Is there enough information? Is there more information than is needed? Does your customer-facing document include information that is useless to the recipient? Can your mom make sense of it?

Basics: Can you easily find and read the information on how to contact a live person and how to interact on the web? Appropriate type size in easy-to-read black or an appropriate color?

Start here. Let us know if you have ideas, or else I might be calling your call center!

Pat McGrew is a document industry pioneer and author of several books including "Wrestling Legacy Data to the Web", "Online Text Management, Hypertext and other Techniques", and "In-House Publishing". She is the Data-driven Printing Segment Evangelist at Kodak's Graphic Communications Group. Her email address is Pat.McGrew@kodak.com.