

Development
Knowledge
Networking
Education



Document, Statement and Transpromo Re-engineering Opening Session

XDU Boston

Stephen D. Poe, EDP, Chair

Monday, 3 March 2008

Document, Statement and Transpromo Re-engineering Agenda

Document, Statement and Transpromo Re-engineering Opening Session	9:00 – 10:00
Service Bureaus Experience with Document and Statement Re-engineering	10:00 – 12:00
Document and Statement Re-engineering Driving Advanced ADF	2:00 – 3:00

Service Bureaus Experience with Document and Statement Re-engineering

- INg provided industry panelists
 - Aart Knyff
 - Cathedral Corporation
 - Stuart Masson, EDP
 - RCS Printing LLC
 - Joh Reske
 - UMass Five College Credit Union
 - Harry Stephens
 - INg
 - Frank Tol
 - Scan Laser B.V.



Document and Statement Re-engineering Driving Advanced ADF

■ Industry Panelists

■ David Day

- Pitney Bowes  PitneyBowes *Engineering the flow of communication™*

■ David Squires

- Kern



Re-engineering Documents

- Changes needed after composition
- Why not redo composition step?
 - Composition step is legacy application
 - Pre-composed data supplied by a customer or another department or division (post-M&A)
 - Need to standardize multiple application outputs
 - Time to market or ROI doesn't justify composition step change

Document Re-engineering

- “Print stream manipulation” in the 90s
- New requirements go far beyond single page hardcopy changes
- Newer technology allows for quicker, easier applications

Next Generation Document Re-Engineering Categories

- **Hardcopy**
 - Modifying individual document content destined to be printed.
- **Electronic**
 - Modifying individual document content destined to be electronically displayed.
- **Multiple Print Streams**
 - Modifying multiple production print streams after composition (e.g., splitting, sorting, commingling).

Re-engineering Documents

- Changes needed after composition
 - For hardcopy-delivered documents
 - Mail stream optimization
 - Tweak marketing messages
 - Optimize for ADF environment
 - For electronic-delivered documents
 - Remove hardcopy-oriented objects
 - Value-add marketing
 - Electronic inserts
 - For multiple print streams
 - Sorting, commingling, splitting

Hot Issues - Hardcopy

- Meet new postal requirements
 - Post-composition address verification
 - New barcodes
 - Replace PostNet with Intelligent Mail Barcode
 - Replace OMR
 - 2D barcodes; e.g. DataMatrix, PDF417
- Meet new ADF requirements
 - Increase efficiency of newer ADF environments
 - Better barcoding for intelligent inserters
 - Extract more information for control files
- Change, personalize marketing messages
- Add or change color


Hot Issues - Electronic

- Remove print-oriented content
 - Barcodes, control numbers, redaction
- Enhance marketing messages
 - Add hot links, individualized URLs
 - Add color
 - Text or graphics
- Electronic inserts
 - Overlays for pre-printed stock
 - Back pages for Terms & Conditions pages
 - Marketing inserts at end of document

Hot Issues – Multiple Print Streams

- ADF Optimization
- Splitting
- Commingling
- Sorting
- Load Balancing

Hardcopy Example - Before

	130 King Street West Suite 1800 Toronto, Ontario Canada, M5X 1E3
---	---

AT 01 23456789 *****



John Q. Customer
4333 East College St.
Fort Worth, TX 76105-4789

Second Quarter Statement
1 April 2007 - 30 June 2007

Customer Service: 1-800-555-1234
Your Rep: Ernie Crawford
Web: www.ctisecurities.ca

Page 1 of 2

Your Quarterly Statement

Summary for account 01141783

Total Account Value	\$123,456.78
Quarterly Activity	
Starting Balance	
As of 1 April 2007	\$123,123.12
Purchases	\$0.00
Sales	\$0.00
Change in value	+\$333.66
Ending Balance	
As of 30 June 2007	\$123,456.78

Did you know you can receive your statements online instead of through the mail?

CTI Financial offers our new **E-Statement** direct to your inbox! Save time and browse your statements online.

Call 1-800-555-9876 today to sign up!

When you sign up, you receive your statement quicker, eliminate filing space in your home, and you're greener - you save paper.

Visit our Web site at www.ctisecurities.ca or call 1-800-555-9876 today to sign up!



Hardcopy - Before

- Old statement
 - PostNet, 3of9 barcodes
- Print-oriented marketing messages

Hardcopy – After

- Changed postal coding
 - Removed PostNet barcode, replaced with Intelligent Mail Barcode
 - Removed 3of9 barcode, replaced with 2D
- Change marketing text
 - Enhanced, personalized marketing messages
- Can also perform intelligent commingling
 - Commingle multiple small print streams
 - Sort
 - Interface to third party software
 - Reduce postage costs, increase efficiency, auditability

Hardcopy - After



HT 01-96406982 B***1DGT



William Anders
Seven Bellaire Blvd.
Ventura, AL 38930-0759



Second Quarter Statement 1 April 2007 - 30 June 2007

Customer Service: 1-800-555-1234
Your Rep: Stephen D. Poe
Web: www.ctisecurities.ca

Page 1 of 2

Your Quarterly Statement

Summary for account 96979819

Total Account Value **\$123,456.78**

Quarterly Activity
Starting Balance
As of 1 April 2007 **\$123,123.12**

Purchases \$0.00
Sales \$0.00
Change in value **+\$333.66**

Ending Balance
As of 30 June 2007 **\$123,456.78**

Did you know you can receive your statements online instead of through the mail?

CTI Financial offers our new **E-Statement** direct to your inbox! Save time and browse your statements online.

Visit so1.ctisecurities.ca/96979819 today to sign up!

When you sign up, you receive your statement quicker, eliminate filing space in your home, and you're greener - you save paper.

Call 1-800-555-9876 today to sign up!

Value-Adds for Electronic Delivery

- Add new marketing offers
 - Turn customer's name into a link
- Add color
 - Change text color
 - Replace B&W graphics with color graphics
- Add targeted URLs
 - Use data mining to extract document information
 - Change to a more targeted offer in text
 - “Visit so1.ctisecurities.ca/96979819”
 - Add targeted URL as the hot link
 - Pre-fill a form in the background
 - <http://so1.ctisecurities.ca/offer123?acct=96979819>

Value-Adds for Electronic Delivery

- Add electronic inserts
- Duplicate exactly what was stuffed in the hardcopy envelope
 - Or expand past what was in the envelope
- Typical electronic inserts
 - Duplicate pre-printer stock
 - Add T&C, other “back page” material
 - Duplicate hardcopy inserts
 - Add new inserts

ADF Issues

ADF Issues

- Sophisticated ADF systems
- Require a high degree of communications
 - Typically control files exchanged between devices
- Control Files must be created
 - Must be accurate
 - Data mining from print stream guarantees accuracy
 - Frequently additional data needed from external sources

ADF Issues

- Many ADF environments heterogeneous
 - Different manufacturer's equipment
 - Some older, some newer
 - Control file formats and contents differ
- Load balancing complicates the issue
 - Print stream originally routed to one set of equipment suddenly rerouted to a different set
 - Control files no longer valid

Multiple Print Streams

Development
Knowledge
Networking
Education



Splitting

Splitting - Solutions

- Load balancing
 - Move parts of larger jobs onto other printers
 - Transfer to other locations
- Postal issues
 - Split large print job by weight
 - Based on number of pages, number of inserts
 - Split by geography and ship to local printing centers

Splitting - Functional

- Break down one print stream into multiples
 - Based on predefined criteria or on data in the document
- Extract all documents or select documents
- Create multiple print streams or write to file

Development
Knowledge Education
Networking



Commingling

Commingling

- Many smaller print streams
 - May even be hundreds or thousands of individual files
- Efficiencies, lower cost if combined
 - But only if combined intelligently

Issues

- Postage rates continue to increase
- Ad hoc document creation costly, out of control
 - Correspondence
 - Customer Support Systems
 - Reprints

Issues

- Small print runs costly:
 - No postal optimization
 - Lots of manual handling
 - Error prone
 - High fixed cost equipment stops and starts constantly
 - Paper wastage due to unnecessary headers/trailers

Commingling

- Taking multiple small print streams
 - Combining
 - Re-engineering
 - Optimizing
- Results
 - Postage savings
 - Production efficiency
 - Increased productivity and equipment utilization
 - Production audit and tracking controls
 - Potentially faster delivery times

Document Re-engineering Summary

- In an ideal world, you wouldn't need it
 - In a real world, you do
- Document re-engineering growing, expanding
 - Now in three application areas, not just individual document hardcopy
- New economic drivers
 - Value-adds such as enhanced electronic marketing
 - Cost savings such as postal reductions
- New tools emerging in the marketplace

Stay with us for the rest of the day

Document, Statement and Transpromo Reengineering Opening Session	9:00 – 10:00
Service Bureaus Experience with Document and Statement Re-engineering	10:00 – 12:00
Document and Statement Re-engineering Driving Advanced ADF	2:00 – 3:00

Development
Knowledge Education
Networking



Stephen D. Poe, EDP
VP, Product Management
Crawford Technologies
+1.214.532.0443
sdpoe@crawfordtech.com

*Crawford Technologies awarded
2008 Xplor Innovator of the Year for its
Document Re-engineering product*

Come see us in booth #331