



Crawford Technologies Inc.
130 King Street West, Suite 1800
Toronto, ON, Canada, M5X 1E3
Tel. 1-416-410-1467
Tel. 1-866-679-0864
www.crawfordtech.com
sales@crawfordtech.com

Customer contact: enhancing transactional communications?

By Stephen D. Poe, EDP, VP Product Management, Crawford Technology

This article appeared in:

FST Magazine online

March 2008 issue

www.usfst.com/



Customer statements and bills are the highest visibility touch you have with your customers. As a result, they have great scope and importance when you consider the critical role they play in company performance, the costs and constraints surrounding their production, and the vital contribution they can have in building stronger profitability. And unlike the majority of messages competing for our attention, transactional documents get noticed. Consumers anticipate their monthly statements and bills, and most have significant incentive to read them, or at least give a cursory glance.

Transactional documents can be an expensive, wasteful and time-consuming proposition, however. Millions are spent on enhancing statements and bills, but shorter time-to-market windows erode your schedules from the back as loss of personnel, legacy applications, and acquisitions and consolidations erode your schedules from the front. How can you efficiently and economically meet constantly shifting change requirements, whether they are new marketing requests, postal service changes, or regulatory shifts? Document re-engineering can be the key to meeting these goals.

Another challenge is the ongoing convergence of siloed dual deliveries for hardcopy and electronic documents. A survey conducted in 2007 by the Electronic Document Systems Foundation reports that while 98% of corporations deliver documents in electronic format, only 8% send more than half of their documents electronically. How do you insure your dual deliveries are on time and meet regulatory requirements? How can you take advantage of the additional marketing opportunities available with electronic deliveries? Document re-engineering can build these critical capabilities.

What's document re-engineering?

Making enhancements to the transactional customer communications after they reach production status has been traditionally problematic. Companies often lack the resources, the ability, or the will to re-engineer 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 changes. Consequently, important document re-engineering efforts aimed at saving money and improving production processes are placed at the bottom of the "to-do" list or overlooked entirely.

Consider these common document re-engineering enhancements:



Crawford Technologies Inc.
130 King Street West, Suite 1800
Toronto, ON, Canada, M5X 1E3
Tel. 1-416-410-1467
Tel. 1-866-679-0864
www.crawfordtech.com
sales@crawfordtech.com

Electronic

- Add personalized URLs (PURLs) to your electronic transactional communications.
- Add electronic 'inserts' into a PDF statement to match the inserts placed into the envelope.
- Add or modify a custom one-to-one marketing message on an account statement.
- Add an enhanced hot link into a PDF statement to drive your click-through rate higher on on-line viewed statements.

Hardcopy

- Replace a PostNet barcode with an Intelligent Mail Barcode (4 state barcode) to get a better postal discount.
- Add a new 2D barcode to more efficiently drive your mail inserters.
- Convert a Metacode print stream to an AFP print stream (or vice versa) so it can be printed on any available printer for better load balancing.
- Take several smaller production print streams, commingle them, resort them to get your best postal discount, and then add appropriate barcodes to the new unified stream.

The benefits of document re-engineering include reduced postal costs, more efficient use of equipment and staffing, better reliability, comprehensive mail piece tracking, and more personalized customer communication. Organizations struggle to obtain these benefits, however, since legacy document applications are not easily or affordably modified.

Document re-engineering categories

At CrawfordTech, we see three broad categories of document re-engineering. These categories are not mutually exclusive; one line of business application could involve one or more categories.

- Hardcopy – Modifying individual document content destined to be printed.
- Electronic – Modifying individual document content destined to be electronically displayed.
- Print Stream – Modifying one or more production print streams after composition (e.g. sorting, commingling).

Hardcopy document re-engineering

The re-engineering of hardcopy documents generally focuses on adding, deleting and/or modifying elements on individual pages. These elements can include anything from text and graphics to advanced barcodes and modified address blocks. For many organizations, mail stream optimization is the most compelling reason for hardcopy document re-engineering. With postage expense typically representing the highest single cost in any mailing, trimming those expenses is one clear and present return on investment. And with Postal Services driving new standards and techniques like intelligent mail barcodes and delivery point validation, companies will need to keep pace or pay the price. Inserter efficiency and printer load balancing also prompt document re-engineering aimed at automated factory-like effectiveness.

Electronic document re-engineering

The re-engineering of electronically delivered documents typically focuses on adding missing content such as terms and conditions or inserts, removing hardcopy-oriented objects such as barcodes, and adding enhanced marketing messages through targeted Personalized URLs (PURLs). Repurposing legacy printed documents for electronic presentment is perhaps the most compelling reason for companies to take on electronic document re-engineering. The savings in paper, processing and postage are often more than enough to justify the effort. And



Crawford Technologies Inc.
130 King Street West, Suite 1800
Toronto, ON, Canada, M5X 1E3
Tel. 1-416-410-1467
Tel. 1-866-679-0864
www.crawfordtech.com
sales@crawfordtech.com

with customers expecting more and varied communications, many companies seek to leverage enterprise information in new and more dynamic ways. Electronic document re-engineering provides a marriage of data and documents simply unmatched in the paper-only world.

Multiple transaction communication stream document re-engineering

The re-engineering of transaction communication streams is focused on enhancing and improving the performance of production process downstream without the need for expensive and time consuming application reprogramming upstream. Even with the awareness that improvements could be made, many companies simply lack the resources needed for the recoding effort or the focus required for truly meaningful improvements. In any case, enhancements for document production systems seem always to fall to the bottom of the pile. But as increases in postal rates continue to challenge operating budgets and regulatory requirements prompt the need for tighter mail piece tracking, companies seek the flexibility and ability to re-engineer existing print streams to meet the changing demands.

Document re-engineering enables process improvement

Document re-engineering is both an opportunity and a challenge for most organizations. If you have considered re-engineering tools and technologies in the past, the time is right to revisit the current solutions and services available. As technology has matured, flexibility and capabilities have increased and price points have made solutions more affordable. Companies are now in position to build a renewed picture of how document re-engineering can be viable benefit to their operations.

Copyright © 2008 by Crawford Technology, Inc. All Rights Reserved.

About Stephen D. Poe

Stephen D. Poe is VP of Product Management at Crawford Technologies. He has 20+ years experience in the enterprise software vendor marketplace, primarily in the field of high-volume transaction communications software. His background includes R&D, development and senior management. He is a frequent presenter at industry technical conferences worldwide and a noted author in the trade press.

Poe sat on the Advisory Committee to the World Wide Web Consortium (W3C) and was an invited consultant to the European Standards Organization (CEN). He is a member of AIIM and Xplor International. Poe holds a B.S. degree in Mathematics and was awarded his EDP certification in 1993.

About Crawford Technologies Inc.

Crawford Technology document re-engineering solutions can eliminate the obstacles preventing companies from making important improvements to high volume document production processes. Crawford's deep understanding of not only the technologies surrounding mission-critical document processing, but also the strategic and business implications of information management help customers transform legacy print applications into new and advanced document processing systems. Customers around the globe rely on us for the tools they need to enable mission-critical document strategies. Contact us today to find out how Crawford Technologies can make a difference for your organization. Visit our web site at www.crawfordtech.com.