



*Winner of the 2008 Xplor Innovator of the Year Award for Document Re-engineering*



## **Document Archive and Re-Engineering Case Study**

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While the notion of the “paperless office” is still a long way from reality, the fact remains that electronic document delivery is quickly becoming a preferred method of customer communications for organizations around the world. Managing the transition from paper-based documents to digital documents is not always easy; however, companies must find ways to effectively manage the co-existence of paper and digital documents while transitioning customers to new electronic delivery channels.

Salmat, the largest provider of customer communications services to the banking, finance and utilities markets in Australia, understands the importance of managing this transition and providing their customers with options for both paper and electronic document delivery. As a result, the service bureau recently engaged Crawford Technologies to co-develop a solution that provides the best of both worlds. The solution, involving several CrawfordTech products along with customized integration services, gives Salmat an affordable, flexible, reliable and repeatable service offering.

### ***The Problem***

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Salmat processes high-volume customer statements for a major bank in Australia. These statements have been historically paper-based and Salmat’s client wanted a way to produce an ‘Electronic Envelope’ - electronic versions that presented information with the same impact and effectiveness as the paper versions. Pre-printed stocks and customized envelope inserts worked well in the printing and mailing process, but presented some unique challenges in the electronic environment. Their goal was for customers to see the same pre-printed paper

stocks, legal terms and conditions, regulatory inserts, and marketing content in both the hardcopy and electronic versions.

After exploring several options including custom in-house development and other vendor’s software offerings, Salmat engaged CrawfordTech to help prepare the print files for ingestion into their existing IBM Content Manager OnDemand (CMOD) archive, and to create a solution to add images of the multiple pre-printed paper stocks used as well as electronic inserts that mirror those physically inserted into the envelopes. The solution needed to be rigorous enough to match the informational content of their hardcopy counterparts yet economical to implement. The process needed to be efficient and fast on ingestion/retrieval, and not require large amounts of disk storage or network bandwidth. An added benefit was the ability to take advantage of the web media for additional dynamic marketing content through URLs and PURLs. Salmat wanted to meet an aggressive development and implementation schedule in order to provide their clients with this new service offering quickly.

### ***The Solution***

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Crawford Technologies worked with Salmat to define a solution approach that meets these objectives with off-the-shelf CrawfordTech software products while allowing for tight integration into many of Salmat’s existing systems, components and processes. Along the way, CrawfordTech provided valuable input into specific design aspects. This resulted in CrawfordTech adding additional capabilities into their standard product offerings. For Salmat, the result was a more streamlined implementation effort and an



elegant approach that not only meets the immediate needs of their banking customer, but also provides a marketable solution.

As formatted print streams are received, PRO AFP Normalizer with the PRO Indexer feature is used to index a number of key fields via TLEs on the way into IBM CMOD archive. CrawfordTech software was chosen for this function over the competitive software due to its unique capability to capture complex floating fields for indexing and extraction purposes. This enables high-volume document capture for archival and compliance, and provides for complex document structuring information in electronic stocks and inserts presentments. Documents are retained in the archive in their original AFP format to allow for high-volume printing as needed, and when a customer requests an online statement the document is extracted out of CMOD and transformed to PDF on the fly using PRO AFP to PDF. CrawfordTech was chosen over the competition for this function due to its superior font and resource management capabilities, ensuring that a common appearance is maintained between the paper-based and electronic versions.

During the conversion from AFP to PDF, Crawford's PRO Document Enhancer software provides the capability to make a variety of enhancements to the documents in order to take advantage of the web media. This includes removing inserter bar codes, adding customized and personalized hypertext links, and introducing a variety of electronic inserts into the PDF statements that represent those that would have been dynamically inserted into the envelope during the insertion process.

The resulting PDF statement exactly matches the original hardcopy version. The look and feel of pre-printed forms and fonts is maintained throughout; and as needed, dynamic marketing content can be included. CrawfordTech added new functionality to the PRO Document Enhancer based on Salmat's requirements and these features are now available to licensees of the software.

## *The Constraints*

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Salmat had an aggressive schedule to implement this new capability into its current production processes. To maintain Salmat's rigorous quality control, a verification process was needed. The speed of the CrawfordTech software enabled the design to keep the advantages of AFP file storage, referencing stock overlay and insert resources once, rather than storing the resources multiple times with each statement in PDF format. This allowed Salmat to adhere to their standard of storing the AFP files for compliance and reprint purposes. Documents are ready for fast viewing and require less processing power using CrawfordTech AFP to PDF conversions on the fly.

## *The Results*

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Salmat processes in excess of 14 million statements per year for this leading Pacific Rim financial institution, and now has the capability to present electronic statements online and on demand to the bank's customers as requested. Each electronic statement contains the exact same "inserts" as the hardcopy version ensuring content consistency no matter what format is requested. They are able to maintain an archive of the original AFP print streams for compliance and reprint, and now have the ability to process and present high volumes of both paper-based and electronic documents with flexibility and uniformity across the two delivery channels. The service bureau may now offer paper and electronic capabilities to Australia and Asia Pacific customers.

"I have not seen such good technical capability from another company in a very long time," says Laurence Shaw, Solutions Architect at Salmat. "We are very aware of CrawfordTech's depth of industry involvement and background, and how the company tackles projects through real customer requirements. I personally felt I was talking with experts at the same level of commitment and expertise as my former colleagues in the labs and management areas of IBM".



Indeed, CrawfordTech's deep understanding of not only the technologies surrounding mission-critical document processing, but also the strategic and business implications of information management helped Salmat achieve their goals within a demanding project timeline and within budget. "Fast responses to testing and questions, the desired output, and discussions on the solution approach have allowed us to make a significant change in direction at a critical time," says Laurence. "As these are new solutions for Salmat, it has been a great benefit to be working with a company of Crawford's experience and capability."

### ***About Salmat***

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Salmat has grown over the last 25 years into a leading international customer communications company. As Australia's largest customer communications service provider, Salmat provides vital links between companies and their customers, whether that be via paper, voice or online, and integrates all forms of direct, one-to-one customer communication so they all work together. The company produces more than 1.5 billion mail pieces each year. More than 4,000 professionals are employed by Salmat, each with a focus on providing end-to-end customer communication solutions for many of Australia's blue chip corporations and government bodies, and a number of major international companies.

### ***About Crawford Technologies Inc.***

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CrawfordTech is a leader in document manipulation and re-engineering solutions. Our robust and flexible products allow companies to boost revenue, build efficiencies and bolster customer service. Our committed and knowledgeable technical teams provide unparalleled development, design and support, and our transform technology is recognized as the fastest and most accurate available. CrawfordTech customers around the globe use our solutions to take advantage of the information contained within their enterprise and maximize return

on investment in existing technology and systems. Our deep understanding of the technologies surrounding mission-critical document processing and the business implications of information management help customers enable document strategies that uncover hidden efficiencies, improve revenue generation, and strengthen customer service.

Come visit us at [www.crawfordtech.com](http://www.crawfordtech.com) to see what it is that we can do for you.

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