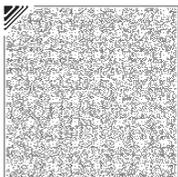




WHITE PAPER

What You're Doing vs. What Customers Want

A Real Life Document Center Manager's Story



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Chuck sat at the breakfast table, frustrated about work. It was getting so he didn't want to go in at all because he could predict a disappointing and unfulfilling day.

"What's wrong with you today?" asked Chuck's wife as she refilled his coffee cup, "You haven't made a move towards the door. I've got to get to work and you're going to be late. Are you ill?"

"Sort of," he responded, running his hand through what was left of his hair, "I'm sick of spending nine or ten hours a day in the document center and feeling like I never make progress towards anything important."

Chuck added a spoon of sugar to his coffee, sighed, and took another sip. He loosened his tie.

"Oh no you don't!" said his wife, "Those people depend on you, and you know what happens if you're gone for a day. It's even worse for you when you return." She was giving him that squinty-eye look she used whenever she thought her husband needed extra encouragement. "You'd better figure out how to make changes down there before you have a nervous breakdown. I don't have time to nurse you back to health!"

Chuck recognized the irony of her comments as his wife was wearing pink scrubs and heading out the door to her job at the hospital. He wisely kept the thought to himself.

"OK, I'm going. Geeze!"

What Happened Last Night?

Like many of us, Chuck starts his day by going through his emails and listening to voice mail. He also encounters piles of paperwork on his desk, and occasionally, notes taped to his office door – or his chair. Chuck is a Document Center Operations Manager. His is a 24 hour operation, so the night shifts always leave him something that needs his attention before he settles in to work on his "to-do" list. Today is no different.

A note from his lead printer operator on swing shift was about customer-supplied paper stock for one of their repetitive jobs.

"The paper was jamming in the printer," said the note, "we threw a bunch of it in the trash."

The note didn't specify which piece of hardware was having issues with the paper stock or whether his crew eventually finished the printing. Nor did the message clarify exactly how much stock they destroyed, though the operator scrawled his note on a piece of the mangled paper, emphasizing his frustration.

Chuck will have to get details from the operator before he can do anything to prevent the problem from recurring. That conversation can't happen until the evening. Twenty-four hours is an unacceptable response time in Chuck's opinion, especially if he has to take the printer offline and place a service call.





Regardless, he'll call the offsite warehouse today to verify the remaining stock on hand. He must also make sure nobody returns any of the problematic paper to inventory before they determine the reason for the jams. Somebody may have to call the customer today and make sure they rush order more paper. Otherwise there might not be enough for the next scheduled run. Chuck wishes he had more information to give the CSR making that customer call.

Several overnight calls from customer service referred to individual documents. Most were asking if it was too late to pull them. Someone didn't want those pieces to be mailed. Chuck can't answer those questions until he reviews the job tickets and double-checks the loading dock to see which pallets of mail are waiting for delivery to the Post Office. Then he'll have to respond to each CSR individually. Those tasks would take him through to mid-morning. Actually finding and pulling the requested documents was a two hour job for someone else on Chuck's staff.

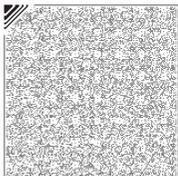
An email from a customer's marketing manager said he wanted to add segmented messages to subsets of the next statement run. Chuck glanced at the schedule on his white board. The job was running tomorrow. Nothing like waiting until the last minute! He forwarded the request to IT, trusting they'd handle it. He wondered about testing. It didn't seem like there would be time. The IT team was great, but they didn't always appreciate the impact their changes had on a high-volume document operation. An overlooked detail could derail an entire job; or worse, cause the work to go out wrong. He made himself a note to check with IT before the end of the day.

State of the ADF

Chuck wasn't totally without tools to run the operation as he wished. The company had invested in Automated Document Factory (ADF) software to give him the information he needed to respond to his customers' requests. The system was pretty complicated though. It was six months before the ADF vendor's professional services people got the first applications running under ADF control.

After Chuck's company had consumed the contracted professional service hours, they planned for their internal IT department to continue the project. Unfortunately, the company reassigned most of the IT resources to work on merging the computing environments of a recently acquired company. Consequently, the ADF system was useful for only part of the work being churned out every day. A good deal of Chuck's planning and strategic decision-making still relied on manual logs, spreadsheets, phone calls, and a healthy dose of guessing. He wished he had all the capabilities the ADF had promised. If only they'd had a better plan from the beginning...

The ringing phone on Chuck's desk brings him back to the present. Emily, the VP of Sales is on the line.



Customer Demands

"Hi Chuck, got a minute?" asks Emily.

"Sure, Emily, what's up?" Chuck responds, still eyeing his list of unopened messages.

"Well, I've been talking to some of our biggest customers over the last few weeks, asking them how we could serve them better. Almost all of them want more visibility into the jobs we're processing for them. They want to know when their jobs are running, what step they are in, and when they will be finished."

"Uh huh," says Chuck, "You know, we have this ADF..."

"The customers also want to pull documents from mailings themselves, at the last possible moment if necessary," continues Emily, "And they need control over the marketing areas of their transactional documents so they can compose and allocate promotional messages and ads more strategically across their customer base. Can we do that?"

"Well, we were supposed to..."

"Oh, I almost forgot. Most of the customers want to submit, hold, proof, and release jobs themselves, depending on the workflow for each application," finishes Emily. She's about out of breath.

"Is that it?" asks Chuck.

"For now, at least. The communications world is changing, Chuck. Everyone is focusing on the customer experience and they want us to help them deliver it."

"I get it," Chuck responds, "Even though we've invested millions in technology over the last decade it must seem to the customers that print and mail operations are behind the times. People get Alexa to do all kinds of things just by asking and they track their driver's route when they get rides from Uber. They wonder why we can't orchestrate the same responsiveness and transparency in document processing. I can't say I blame them."

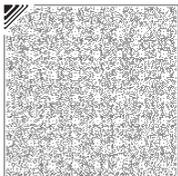
"So we can give it to them?" asks Emily.

"No. At least not today."

"But what about the automated document factory? Wasn't that supposed to give you all the data you needed to run a modern customer communications facility?" inquires Emily.

"You're right. We thought the ADF would give us more control and visibility into the production workflow, but we found that getting it up and running was a bigger job than we anticipated. With the merger and all, we don't have the resources to implement all the functionality we bought a few years ago," explains Chuck. "And truthfully Emily, the system we chose was never designed to deliver the self-service capabilities your customers are describing. Customer expectations are changing faster than we can respond."

"Chuck, customers will take their business elsewhere if we can't give them the tools they need to manage the relationships they have with their customers. The transactional and direct mail messages we produce for them are a big part of how the document recipients perceive our customer's companies," says Emily, "What are we going to do?"





Chuck rubs his head and gazes through his office window to the production floor. He can see an inserter operator across the way making an unkind gesture towards his machine; something Chuck will have to check out after his call with Emily.

“If we really want to fix this operation, I think the first step is a rescue mission. We need to get somebody in here to figure out what we can salvage from the hardware and software we bought four years ago. Then, hopefully, they can tell us what else we need to tie all these pieces together so we can manage more efficiently and also give the customers the visibility and control they want,” Chuck tells Emily.

“So you’re telling me the ADF investment isn’t paying off like we thought? That we can’t give our customers the ability to communicate with their audiences like they want, without upgrading to a more comprehensive workflow automation solution?”

“Yes.”

Emily is silent for an agonizing ten seconds. When she speaks, she is thankfully calm and controlled.

“Tell me about the pieces you need to integrate, Chuck. If I’m going to the ninth floor asking for money or resources, I need to be clear about the problem we’re trying to solve.”

Chuck is a little surprised. He expected Emily to look for someone to blame for the ADF failure. He figured he’d be the prime target.

“No, I’m not upset,” Emily tells him, “You said yourself our ADF system, which was state-of-the-art at the time we bought it, can’t meet today’s demands on its own. No one here is responsible for customer communication changes that occurred so rapidly.”

“Besides,” she continues, “I don’t see that we have a choice. Our competitors are improving workflow automation and customer visibility in their facilities. If we don’t keep up, we won’t have any customers left. Now, tell me about your bottlenecks and issues.”

“Give me half an hour,” says Chuck, “I’ll be up to see you with a list!”

Meeting with the VP of Sales

Emily removes her glasses after perusing the list of features and functions Chuck had composed.

“I understand most of this, but I need you to elaborate on a few things for me,” she says, looking the Operations Manager in the eye. “What do you mean by designing and configuring workflows?”

“That’s actually one thing that kept us from fully implementing the automated document factory. The system requires complicated scripts and command strings that make everything run. To add new jobs or modify existing ones we have to get programmers involved, or pay for more professional services. It takes too long, assuming we can get the resources at all. Plus, at the rate things are changing, workflows can be obsolete pretty quick,” said Chuck. “Every job is different. We need to put the pieces together into a seamless flow where operations and business line people can collaborate, without relying on IT every time.”





“OK, that makes sense. Now I know what dashboards are, but why do we need them in a production workflow environment?” asks Emily, pointing to the item on Chuck’s list.

“The dashboards are mainly for me,” responds Chuck, “I need real-time information so I can respond to conditions as they occur.”

“Give me an example,” says Emily.

“If my dashboard shows a piece of equipment, like an inserting machine, has no work while other machines have work queued up for the rest of the day, I can reroute some of the jobs to balance the workload throughout the shop,” explains Chuck. “This will be real important once we integrate the production site we acquired in the merger. I won’t have to make phone calls to the remote site and wait for responses before making decisions that can impact our ability to meet SLA’s.”

“Good point. I hadn’t thought of that,” says Emily, “You included accountability on your list. Can you elaborate this for me?”

“My operation is accountable to a lot of entities,” Chuck points out, “To corporate management and our customers of course, but we’re also accountable to regulatory authorities for some of our work. Personally, I’m accountable to my employees. It’s my job to make sure they have the support they need to succeed and produce the work with accuracy and integrity. Today, I don’t have the tools I need to make my operation the best it can be. That has an effect on all those accountabilities.”

“So how would a more comprehensive workflow automation solution help you with accountability?” asks Emily.

“The portals that give our customers more visibility will provide part of the accountability. Expandability, real-time alerts, and flexibility helps with the rest. With a more comprehensive control and reporting system I can confidently take on more work, create new solutions, get the best productivity from our operations, and accurately predict the impact of changes in the company or the industry,” says Chuck.

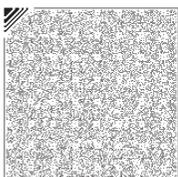
“I think you’ve made a good argument here,” says Emily pointing to Chuck’s functionality list, “I’ll put together an executive presentation using your ideas along with the customer research I’ve been compiling. We’ll see what happens.”

Chuck rises from his chair.

“Thank you Emily, it’s great to have someone finally listen.”

“Hey, “ she says wryly, “If you can’t produce what I tell you the customers want, we’ll all be out of a job. I’ll let you know how it goes.”

Chuck walks out the door. Checking his emails as he makes his way back down to document operations, he sighs as he reads about more items requiring his immediate attention. Oh well, maybe he’s made progress today towards building the communications production department he knows his company really needs. That thought will make the rest of the day a lot more tolerable.



See What Else is on Chuck's List

DOWNLOAD IT HERE



PRO Conductor from Crawford Technologies is a highly configurable and easy-to-use web-based dashboard that delivers real-time access to all processes in complex production workflows. Users can create, automate, and monitor workflow activity, resulting in reduced manual intervention and increased efficiencies and profits.

Crawford Technologies orchestrated PRO Conductor to integrate easily with other software systems and equipment. The solution features modules supporting specific functionality and it can fit into virtually any environment. Companies can extend and enhance their workflows as needs change and business evolves.

Comprehensive Workflow Creation and Management

An intuitive drag-and-drop interface lets users define input and output management, scheduling, notifications, triggers, alerts, database activity and more. The system provides comprehensive process automation, so important in today's complex, multi-channel communications environments.

Dashboards display real-time views of job status at a high level. Users can drill down into details such as job origination, current status, due dates, and more. Operations running with PRO Conductor can offer their customers their own secure web dashboards that will allow them to submit, proof, approve, and track their jobs. PRO Conductor provides the highly requested self-service and transparency functionality customers are demanding from their service providers.

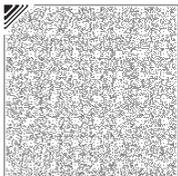
For more information about PRO Conductor, contact us at 866-679-0864.

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