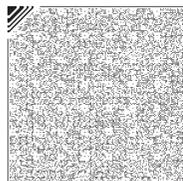# CRAWFORD TECHNOLOGIES

Why Invest in an Automated Document Factory?

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Companies implement automated document factory (ADF) technology for a variety of reasons, including:

- Security/privacy

- Operational efficiency

- Multi-channel distribution management

- Production planning/resource allocation

- Automated reprints

- Regulatory compliance

- Service Level Agreement (SLA) adherence

- Postal savings/mail preparation

- Process visibility

- Improved customer service

- Competitive advantage

Organizations processing documents containing private or sensitive information will focus on how an ADF can prevent accidental disclosure and allow them to comply with regulations pertinent to their industries. Others may concern themselves with meeting SLAs or improving productivity. ADFs can also help organizations save money on postage and mail preparation or make aspects of their workflow, such as reprints, be more efficient.

Item tracking and reporting is becoming a minimum requirement for the modern mail center. Even organizations that do not process documents subject to regulatory controls find their customers are demanding more accountability for individual mail pieces. As document composition engines have become more versatile, even traditional statements, bills and other documents are likely to contain highly targeted and personalized messaging. It is imperative the correct recipients receive these items, and the material arrives on time. ADFs assist document operations in achieving these goals.

Outside service providers and in-plant document operations that can assure customers the operation produced and delivered every document accurately have a competitive advantage. The customer experience is a prime focus for many organizations. Confidence about the status of paper and electronic documents, and the ability to convey that information to customers immediately, contribute positively to customer relationships.

How Can an ADF Help Your Business?

Security/Privacy

Information security is a concern for all organizations. Production workflows for physical documents and digital output channels include many places where information from two or more customers can be accidently mixed. It may not be possible to prevent errors from happening 100% of the time, but ADF technology can allow document operations to correct mistakes before flawed documents leave the production facility.

A privacy breach is always troublesome, even if documents do not contain regulated or protected data. Customers who learn an organization distributed their information to unauthorized recipients can publicize the event, damaging reputations of the sender and their service providers.

Some organizations have their own mandates for privacy protection. An ADF can provide the proof and accountability demanded by such internal requirements.

Because the ADF accounts for every page in every document at each step in the workflow, the system can alert operations management if item-level reconciliation fails to balance. Operations can easily find and correct mistakes before they are an outbound communication.

Some troublesome workflow areas that produce mixed-customer documents include:

- Printer jams that result in missing pages, extra pages or unsynchronized duplexing.

- Static electricity that causes pages to stick together.

- Pages lost or mixed in transport from print rooms to mail centers.

- Matched envelope contents that are missing or out of sequence.

- Document composition errors result in accidental page overflow.

- Mixed data from two different customers.

News reports frequently publicize privacy breaches caused by printing or mailing mistakes. Some errors are severe, such as revealing social security numbers, salary or income information, or even bank transactions or medical conditions. Correcting such mistakes can be costly. Companies have assumed costs for credit monitoring services, suffered embarrassment in the press or have lost business because of mistakes an ADF might have caught. Other organizations have offered incentives or discounts to retain the business of customers after the document center made preventable mailing mistakes.

Operational Efficiency/Production Planning/Allocation

Companies can use ADF data to study statistics such as throughput rates, idle time and bottlenecks that cause processing delays. Managers can use this information to change the production floor layout, streamline quality control procedures and improve material designs, among others.

Some ADF solutions include modules specifically designed to aid with resource allocation and production planning. They include tools that allow managers to test 'what-if' scenarios, moving work around to different shifts or equipment. Managers can harvest ADF data about employee productivity, equipment efficiency and how characteristics of different jobs affect the overall production effort. Document production managers may even use data supplied by the ADF to administer employee performance bonus programs.

Companies considering equipment upgrades will find the production data captured by an ADF valuable in assessing the impact of proposed capital investments in new hardware. ADF data can help managers test the productivity effect of replacing two older inserting machines with one high-speed device, for instance. Job schedules, SLA's and job characteristics can all affect the final equipment acquisition decision.

As companies contemplate using new communication channels, data accumulated by the ADF is invaluable in projecting the effect of digital migration on production workflow, equipment use and staffing. How does the workload change if 15% of customers enroll in paperless distribution? What if 30% sign up for electronic delivery? These questions are more easily answered when one has been capturing production information in a centralized ADF database.

Automated Reprints

In many operations, reprinting documents damaged during printing, folding or inserting is a manually intensive and error-prone process. Employees must identify the document, the customer account number and the original print job. This can be a painstaking exercise. The employee sometimes receives only bits of paper that operators dug out of the machinery.

Once the print operator has identified the account and the job, they re-load the print files or access an archive to reprint, fold and insert the pages. Often, these manual activities are not logged. No audit trail exists to answer the oft-asked question "where is my document"?

Automation produces significant cost savings, higher quality and better customer service. The ADF recognizes when a printed document was not logged as completed or it was in the machine at the time of a jam. Then the ADF can automatically reprint the document immediately to include in the current day's mailing or add the document to the next day's production run. Naturally, the ADF records all activity in case of an audit or research is necessary.

A common practice in mailing operations is allowing operators to reassemble mail pieces manually after a jam occurs. Under the control of an ADF with automatic reprinting, companies can implement a "touch and toss" policy, eliminating document integrity errors caused by human intervention.
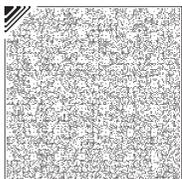
Regulatory Compliance

Closely associated with the security/privacy benefits described above is the ADF's ability to enable mailers to respond to inquiries when questioned about a regulatory infraction. Incident response is vitally important to resolving issues that could trigger sanctions or fines from the regulatory authority. Searchable records maintained by the ADF make it much easier to respond, with documentation, to inquiries.

Enforcement and auditing efforts by regulatory authorities have been increasing in recent years as have the penalties for non-compliance. Companies under examination must be able to show they have tools and procedures in place to prevent violations and respond to inquiries. Regulators are harshly critical of companies failing to mitigate privacy violation risks. The Office for Civil Rights (OCR) enforces compliance with the Health Insurance Portability and Accountability Act (HIPAA) in the USA. The regulator has levied substantial fines when covered entities have suffered a breach and an audit reveals insufficient preparation and prevention measures.

SLA Adherence

Service level agreement failures can be expensive. Service providers are subject to performance-based fines, and repeated failures can lead to contract cancellation. For internal document operations, missed SLA's can cause an organization to lose confidence in the in-plant's ability to perform their functions reliably. Initiatives to outsource document operations may follow.

ADF solutions guard against these events by monitoring activity throughout the workflow. The ADF measures volumes awaiting production against the productivity of available resources and the time allowed under pre-established agreements. When the system projects work will miss the deadline, the ADF displays these alerts on dashboard screens or overhead displays. Many ADF systems also inform key employees of looming problems via email or text message.

Postal Savings/Mail Preparation

ADF solutions can enable postal savings and streamline mail preparation by gathering information from multiple jobs and feeding it through specialized postal software. Some ADF systems come with ready-made hooks for integrating the postal software right into the workflow.

Another way organizations can realize postal savings is by implementing householding. This strategy reduces the number of outbound mail pieces, and the postage cost, by combining formerly separate documents to in a single envelope. Householding has become a more practical solution for mailers since the US Postal Service revised postage rates for First Class Presort Letters. Under the latest regulations, mailers can add pages to documents without an increase in postage, regardless of mail piece weight. Document re-engineering tools such as Crawford Technologies' Operations Express allow mailers to combine print from different jobs into a new, householded, print stream.

Strategies such as these require comprehensive document-level tracking and control systems to ensure the mailer accounts for all the documents they intended to combine in an envelope. The ADF software also enables customer service representatives to understand which documents the organization mailed, and on which day, allowing them to handle customer inquiries more effectively.

Process Visibility/Improved Customer Experience

Without an ADF, client questions about the status of their work are interruptions. These inquiries inevitably lead to a search of the document operations department or inspection of paper records before calling the customer back. Document operations can often supply only imprecise or estimated information because their status reports are composed on the job level.

In ADF environments customer service can quickly answer customer questions such as "when was my document mailed?" or "in what channel was my document delivered?" without interrupting production in the document center or requiring a call-back. Customers may even answer their own questions via self-service portals. When customers can get their answers accurately and immediately, satisfaction levels rise.

Additional Value from Full Color Inkjet

Companies that migrate from pre-printed paper stock to a white-paper environment realize savings in purchasing, warehousing and inventorying multiple paper stocks. But an ADF can enable even greater cost reductions.

Tools within the ADF workflow allow companies printing in a white paper, full color inkjet environment to merge jobs they previously separated because they required different pre-printed paper stock. This consolidation can reduce the number of small, labor-intensive jobs and increase postage discounts. A perfect example is a service provider who prints and mails statements for multiple customers. By combining all the documents for the day and sorting them into mailing sequence before printing, the service provider can run large printing and inserting jobs without interruption. They also achieve postal density unreachable within each individual job.

Print and mail operations may use the capability of the full-color inkjet functionality, along with intelligent document composition software, document re-engineering utilities such as Operations Express from Crawford Technologies, and the tracking and control features of an ADF to reduce or eliminate pre-printed statement inserts. Workflows for processing transactional documents that once required stopping an inserting machine to change pre-printed insert material can be greatly simplified.

With the marketing or regulatory messages embedded in printed documents, mailing operations may process the work on equipment with fewer insert stations. Mailers can lower costs and recover space in the warehouse, staging areas and the production floor.
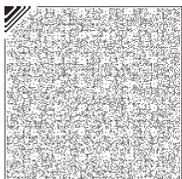
ADF Enablers from Crawford Technologies

PRO Production Manager One of many excellent products on the market today, PRO Production Manager supports the creation of an automated document factory that meets all the requirements of today and prepares document producers for the complicated document production and distribution world of the future.

Flexible Workflows with PRO Production Manager

This open, configurable solution enables end-to-end process automation management. It bridges data sources, composition systems, printers, inserters and the mail stream, resulting in a seamless production workflow.

Migrate to Inkjet with PRO Inkjet Express

This scalable solution allows you to migrate existing processes to take full advantage of the capabilities of full color inkjet presses without re-creating existing print streams or reengineering ongoing production workflows.

Real-time Dashboard with PRO Conductor

PRO Conductor, available as an integrated module for other CrawfordTech solutions, provides an easy-to-use web-based dashboard that gives real-time information of job status, with customizable reports and metrics to provide insights into key performance indicators.

Customer Experience with PRO Preference Manager

Customer experience (CX) strategies hinge on putting more control into the hands of customers. With PRO Preference Manager, document recipients can manage their own preferences via our customer's secure web portals. PRO Production Manager then puts this information to work, directing documents to the currently selected delivery channels at production time.

Accessible Documents

It's more important than ever to provide documents in accessible formats for the growing population of blind, partially-sighted, and cognitively disabled individuals. With our solutions customers can automate the creation and delivery of documents in formats such as Accessible PDF, Accessible HTML5, Voiceye, and other formats. Conversion to accessible formats becomes an integrated component of the production workflow.

Summary

Choosing the right ADF vendor requires comparing the requirements and priorities of the document producer to the individual features and strengths of the solutions under consideration. Sometimes the best match will be our PRO Production Manager, possibly in conjunction with other CrawfordTech and third party solutions. In other situations, another product may be a better fit. Whatever the choice, a well-chosen automated document factory will help any operation lower costs, raise quality and improve productivity.

CrawfordTech Solutions

Crawford Technologies develops software and solutions to help enterprises optimize and improve the secure and accessible delivery, storage and presentment of their customer communications.

With over 1,800 customers on six continents, CrawfordTech solutions and know-how enable the largest banks, insurers, healthcare providers, utilities and print services companies to use their existing technologies, documents and data in new ways. We help them navigate the challenges in leveraging legacy applications in the platforms and applications of the future.

CrawfordTech's products, services and domain expertise reside at the nexus of content, data, and output management and are essential components of our customers' digital transformation, output management and document accessibility strategies.

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