

# A FINANCIAL SOLUTIONS PROVIDER AUTOMATES THEIR WORKFLOW

Integrating systems for an end-to-end workflow



## BACKGROUND

This large company, with annual revenue of approximately \$10 billion, provides financial benefits solutions such as disability, life, health and accident insurance to 30 million people directly as well as through more than 150,000 brokers and consultants in the United States and the United Kingdom.

Their centrally located printing facility relies on inkjet technology to produce and mail statements and other material. Because the output volume is very high, and they must be in compliance with regulatory driven SLA's, this provider had implemented Canon's Océ PRISMA production workflow system for maximum production efficiency.

### The Challenge

The financial benefits company had invested in Satori postal optimization software that needed to be integrated with their workflow and production environment. Since the integration had to support six different document types, including seven different versions of 1099 tax statements, there were challenges in being able to successfully create a fully integrated solution.

### The Solution

Crawford Technologies recommended that Operations Express be integrated with the Canon Océ PRISMA production workflow system and their postal optimization software – effectively tying the two systems together. In order to manage all document types and provide a high degree of automation, the CrawfordTech professional services team created a multi-step process that normalized application specific print streams and provided a standard workflow to support additional document types and to enable future workflow enhancements.

## At a Glance

### CrawfordTech Products:

- Operations Express

### Objective:

- To gain efficiencies by integrating postal optimization and workflow solutions for end-to-end automated production.

### Challenge:

- Meeting government defined requirements for financial delivery.
- Integrating systems from different vendors

### Solution:

- Operations Express was implemented with customizations that created an automated process that normalizes multiple print streams and takes advantage of postal optimization software.

### Results:

- Demanding turnaround requirements were met with a highly automated solution, saving time and money.



## The Process

The first step of the workflow is to extract the address block data, saving that information, including fonts and address positioning, removing it from the original page. This information is then passed to the Satori Postal Optimization process, which either updates the individual address record, or sets a flag to indicate that postal optimization has failed for that record.

In the next step, the standard workflow automatically adds the updated address information back into the correct documents, and splits the original file based on whether or not the address was updated. Output is then directed to downstream archiving or printing workflows, based on postal optimization failure or success. In addition, streaming and combining jobs, or segmenting very large jobs is enabled to optimize output across multiple devices and to further automate post-production processes. For example, different bundles are created based on the number of pages in each document so that output can be intelligently distributed based on envelope sizes required for mailing. The output is automatically modified to include customer banner pages, barcodes and indexes for archiving .

In addition, optimization processes enable print load balancing; routing of different document types to the proper automated insertion devices based upon the number of pages per package; the automated creation of operational barcode, indexes and metadata for document archiving; banner pages for specific customer documents; and more.

Because the CrawfordTech solution needed to be integrated with a Linux based workflow environment, a standard naming convention was developed so that components can be easily added without changes. The entire system has been architected so that software updates and new modules can be implemented with minimal effort and no disruption to ongoing production.

## Results

Once the initial implementation was complete, the provider was able to produce all 1099 statements within two weeks, meeting government imposed deadlines on the print and mailing of these documents. Workflow inputs from multiple platforms are now integrated into a single, end-to-end workflow, resulting in a highly automated process – allowing this company to meet rigorous deadlines, keeping their processes lean and efficient, saving them operational costs.

## 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.