


# Who Needs an ADF?



Enterprises have many reasons to consider installing an Automated Document Factory (ADF). The benefits of control, accountability, analysis data, alert notification, productivity improvements and cost containment are important for almost all organizations that create and distribute customer communications. Operations failing to offer this functionality, be they outsource providers or in-house document centers, will find it difficult to support the document applications important to their customers.

Companies become interested in ADF technology because of obvious pain points such as incidents of mixed account documents, failure to meet SLAs, or losing business to competitors who offer the advantages and security ADFs provide.

Other times, companies see ADF technology as a critical business growth enabler that allows them to enter new markets or deliver a better product to their customers.

## Could an ADF Benefit Your Company?

### *Assessing Risk*

What are the consequences if you accidentally expose personal information by mixing accounts? What if a job misses a mailing deadline? If a machine fails during a production job how will the operator restart at the correct place, avoiding duplicates or missed documents?

### *Controlling Costs*

Can you drop the third shift? Which jobs take the longest to run? How much time do you spend chasing down inquiries about job or document status? Can you reduce production and postage expenses by combining jobs? When does it make financial sense to replace aging equipment?

### *Attracting New Business*

Would new markets, such as processing HIPAA controlled documents, be accessible to your organization if you had better tracking and controls? Are there opportunities to print and insert variable page-count statements? Are all the latest RFP's requiring multi-channel document delivery and customer preference maintenance?

### *Improving Service*

Can responding quicker to customer inquiries aid in customer retention? Will automated reprints get documents into the mail a day or two sooner? Would real time alerts allow management to resolve production problems before they impact customers?

Any of these items could justify the purchase of an ADF solution. Most companies see improvements in multiple areas by taking full advantage of the capabilities offered by today's modern automated document factories.



## Investigating a Solution: Identify all the Stakeholders

Document printing, inserting and mailing operations are obvious stakeholders in the changes that will come about from an ADF implementation. But the ADF solution will affect several other groups and departments as well. Other entities will lend resources to the design and implementation of the ADF solution. Typical involved groups include:

- Information Technology
- Quality Control
- Customer Experience
- Legal/Regulatory/Compliance
- Finance
- Marketing
- Customer Service
- Sales
- Business Lines
- Customers
- Outsource Service Providers

## Making the Decision

As you identify your needs and investigate possible solutions, consider the following points:

### *Scope of the Project*

Are you seeking a single site solution or do you need an ADF to manage work at multiple locations? Are the multiple locations run independently or will you balance the daily workload among all the sites? How many distribution channels do you support now, and how might this change? Will you implement the ADF concurrently with other major projects, such as converting to inkjet?

### *Milestones and Deadlines*

Are customers or regulatory authorities imposing deadlines? What are they? How will these targets affect project priorities?



## *Measurement*

Is baseline data available? How will you measure ADF effectiveness? Will you need help to identify problems and make adjustments?

## *Identify Current Issues*

Are there existing problems such as mixed documents, reprints, productivity, scheduling or distribution channel errors? Do you have blind spots in the workflow where you can't determine the status of a document or a job?

## *Strategic Goals*

Are errors or inefficiencies retarding growth? Is customer satisfaction waning? Is your company striving to provide customers with a seamless communication experience?

## *Review Options*

Which ADF features are most important? Can you implement some now and some later? Are investments in new equipment necessary or can you modify current hardware? Do you need portals for your customer service department or for end customers?

## *Assess Risk*

What is the effect on customer communications if you take no action? Are regulatory violations a possibility? Can the ADF project continue on schedule if your IT resources are reassigned?


## *Project Costs and Savings Opportunities*

Consider acquisition, professional services, training, equipment modification or replacement, manpower reductions, improved cash flow, lower postage, better use of equipment, reduction in outsourced work, etc. Each organization implementing an automated document factory may have different objectives for saving money or taking advantage of new opportunities.

## **Today's Market Calls for Integrity and Control**

Document centers and print service providers are finding customers expect their vendors to provide tracking and integrity controls. Any operation that handles documents containing sensitive data must have iron-clad processes to prevent accidentally exposing a customer's private information. Complex applications amplify the need for the document-level controls available via ADF technology.

Jobs that feature variable page-count documents, matched envelope contents, addressing on closed-face envelopes or duplex-printed variable data are especially vulnerable to errors. Applications like these are risky to run without a sophisticated system of identification and tracking.



Even direct mail marketing applications demand the document integrity measures provided by ADF systems. As applications become heavily personalized, error risk increases. Mismatching elements of a personalized mail piece can cause a great deal of difficulty for the service provider or the in-house document center, including costs of re-work or even the loss of an account.

As overall mail volumes drop due to more precise targeting and migration to digital channels, the value of each mail piece rises. Failing to mail to some portion of the list or making mistakes that lessen the ability of mail pieces to produce the desired result strengthens customer perceptions that mail is too expensive. Too many mistakes will cause mailers to consider alternative ways to communicate with their customers and prospects, further decreasing mail volumes.

Besides the obvious benefits of improved mail quality, lower costs or more efficient operations, ADF solutions can also open the door to new opportunities.

Improved tracking and control allows document centers to consider strategies such as householding and co-mingling jobs. These strategies, often enabled with document re-engineering tools like Crawford Technologies Operations Express, lower operational costs and postage expenses. Re-engineered documents can also enhance the customer experience.

Multi-channel distribution is a feature of all contemporary customer communication strategies. This is a moving target as new trends and technologies emerge. A flexible ADF platform is essential to provide the accuracy and responsiveness required by companies seeking to connect with their customers across multiple channels.

The complexity of capturing, maintaining and acting upon customer communication preferences, combined with the need to output documents in multiple formats to support physical and digital channels, requires an automated document factory. The expected growth in digital delivery systems will add to this complexity, so service providers and in-plant document centers need to be ready.

Higher productivity and greater control can enable business opportunities. With the ability to demonstrate higher degrees of accuracy, productivity and quality because of the ADF, organizations may find they can attract customers with higher volumes or those with turnaround requirements they could not previously support.

And finally, organizations can use customer communications data accumulated by the ADF to assess their entire customer communications strategy. This information can help ensure customer messages are consistent, relevant and necessary. Companies can integrate the ADF with other business processes and bring customer relationships to a whole new level.

## CrawfordTech Solutions

Crawford Technologies develops software and solutions to help enterprises optimize and improve the secure and accessible delivery, storage and presentation 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.

## ADF Enablers from Crawford Technologies

### *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.

### *Real-time Dashboard with Alchem-e™*

The Alchem-e system, 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, 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.