

An industry white paper

From the desk of

Jacques Mirodatos

Transactional documents done – Now what!?

Over the past 20 years corporations have invested heavily in the effective production and management of their transactional documents (statements, invoices etc). These documents are well managed and well controlled. Naturally, communication volumes continue to grow. So what is the next large scale document space that the corporation should address? This document explores the next big document revolution.

Nirva Systems UK – October 2008

Transactional documents done. Now what!?

In the last few decades the printing industry has seen a tremendous evolution. We have progressed from programming aids such as PPFA, and pseudo languages such as Metacode, to a complete end-to-end industry supporting everything from data to the mail bag. Our batch systems are constantly measured, reviewed and enhanced as we strive to achieve maximum efficiency and automation throughout the production chain. We print in duplex, roll to roll, on white standard stationary, in full colour. We retain, merge, split and sort documents to achieve minimal printing costs. We then insert these documents automatically into standard envelopes, sorted by postal sequence, along with all the information required by the post office to achieve maximum postal discounts. **A job well done!**

However, whilst sorting out our batch production facilities, and squeezing every penny of cost out of the system, we seem to have overlooked an important part of the daily print production. A part of print production that we haven't yet taken control of. That is the document created in the office environment, at the desktop. There are quite literally millions of documents generated, printed and posted from our offices on a daily basis.

Research conducted by Microsoft has established that each office worker creates, prints and sends up to 11 mail pieces per day. Research conducted by Nirva Systems has established a range of between 6-12 mail pieces per member of staff per day, and indeed, one bank identified that they were sending 100 million such mail pieces per year! An article in *The View* (European Xplor Journal, January 2008), titled *Desktop and bulk hybrid mail* cites UK studies which estimate 8 billion such mail pieces per year for the UK alone. That is over 30 million items per business day. Furthermore, there is limited traceability around these documents – who they were sent to, by whom, why, with what content, using which branding, and also, where they have been stored for future retrieval.

What is the number for your organisation? Whether you are 1000 or 10,000 staff, the volumes can be surprisingly high. Usually, each mail piece is printed locally, often on expensive pre-printed stationary and inserted manually into an envelope along with various attachments or inserts. The envelope is often placed in an out tray, to be collected and franked at 1st class rates later on. Frequently, the person who has created and printed the document carries out the entire process.

Various PC based tools exist which count all documents printed from particular machines. However, these tools are designed with a view to analysing the data and providing the customer with the best possible printer configurations for their office environment based on actual usage. Yet no additional steps are taken to reduce costs associated with this print volume, for instance around postal costs or fulfilment.

More and more companies are scrutinising these print volumes in an effort to reduce their costs. Solutions involve capturing the office document print streams and redirecting them to the batch production facility where they can be more cost effectively produced (merged, printed, sorted, fulfilled and stamped). By using the same proven techniques that have supported transactional documents for 20 years, companies are gaining significant additional savings for office document production. Usually postal savings alone can generate paybacks counted in months, sometimes weeks (our bank cited above expects to save as much as £10

million annually!). Corporations gain the added bonus of saving invaluable time of staff who initiate these documents, allowing them to focus on their core activities.

Yet there is much more to managing these office documents than simply capturing them for batch printing. Batch printing can only help reduce operational costs if the user's adoption rate is high enough. But individually, users will not experience the global benefits the corporation will achieve. Thus, for users to adopt change, solutions need to come with increased value added functionality. Examples include:

- Secure temporary storage of outbound items in a document vault where they can easily be accessed at all times prior to despatch. This allows further changes along the line, such as adding different documents into the same envelope, merging different mail pieces together or even offering the facility to cancel a piece if business conditions have changed between the creation of the document and its actual sending.
- Address validation.
- Secure transfer to the corporate archive for future access. This is particularly important for compliance and also for call centre representatives.
- It is essential to provide the users with a tracking facility so they know at all times what is happening to their document, where it is, how to access it, and particularly, was it actually sent and when.
- Management information and reporting.

There is much more to office document management than pure print and postal cost reduction alone. As the subject gains visibility and adoption in the modern enterprise, experience is showing improved customer relationships, increased office efficiencies, improved compliance, as well as further downstream process improvements resulting from improved customer communications. Corporations have reported reduced call centre staffing, improved manufactured product delivery and resulting cash flow and even reduced no shows for appointments (in a medical environment).

If you are interested in debating this subject further please feel free to contact the author – Jacques Mirodatos.

Jacques is presently the Technical Director of Nirva Systems UK Ltd. Jacques has more than 20 years experience in the document space as a technical director and industry evangelist. He has held senior technical positions at numerous specialist companies in the document space including Astron (prior to its acquisition by RRD), edotech and Lasercom. He has also sat on advisory panels with various composition vendors, most notably Metavante and Exstream. Jacques' numerous roles have included consultancy, analysis, architectural design and project management. Jacques possesses a rare capacity to bridge the communications gap between technology and business requirements making him a sought after analyst as well as a speaker at international seminars and conferences.

In addition to his role as Technical Director of Nirva Systems UK Ltd, Jacques is the Chief Architect for the Nirva set of products.

Please feel free to contact Jacques on:

Jacques.mirodatos@nirva-systems.com or +44 7902 923 774