

Case Study: Financial Services/Government



About the Customer

For over 70 years, our customer (the “Bank”) has provided a unique service to a United States federal government agency. This service includes operating a large call center—and providing back-office support—for a key citizen-facing program.

The operation has service-level objectives on all work received via telephone, email, and physical mail. Requests must be completed within a certain number of days

to comply with government performance and results expectations. If a customer does not provide information required to complete the request, the operation must send the customer a request for that information.

The operation is also measured by how much work each representative processes each day, so the ability to quickly create and send correspondence is of paramount importance.

The Challenge

The Bank had been using internally-developed software to create correspondence. The software had become difficult and costly to maintain, and lacked critical functionality.

In particular, the legacy software...

- » Had no centralized print management capabilities
- » Could not link attachments to templates
- » Did not include any quality assurance controls
- » Had no audit trail of changes made to correspondence
- » Could not confirm correspondence had been received
- » Required approx. 40 steps to complete each letter

Template Management

Templates were spread across the 600-person operation. Each representative kept local copies of frequently-sent correspondence, which reps would duplicate then personalize. This introduced variability between letters sent from different reps, and made updating templates a very difficult and unreliable process.

Quality Assurance

The legacy software had no quality assurance tools. Managers were not able to review any correspondence before it went out. Inaccurate content could go out unchecked, and the Bank would be unaware of the problem until it was too late.

Audit Trail

Since templates were often shared, there was no way of knowing which rep worked on a given letter. One rep might start a letter, while another rep might make changes before the correspondence went out. If there was a problem with a letter, it was very difficult for managers to know which rep or reps may have worked on the letter.

Track and Report

The legacy software was not integrated with the hardware used to print and mail final letters. The Bank could not track a letter from creation to the intended recipient's mailbox. If delivery failed due to a bad address, the customer relationship management database had to be manually updated. That process could take days, even weeks, delaying the process and degrading service levels.

Business Process Analysis

When an IT project manager measured the process of generating correspondence, he had to use a stopwatch and pen and paper, and physically move with each letter through the workflow. He witnessed representatives wasting precious time printing and editing drafts, walking to the printer and finding the final letters, then printing address labels and finally sending each letter. However, he could only track the process that far. He had no way to track the correspondence once it left the facility.

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The Solution

The Bank wanted a single point of contact should any issues crop up during initial implementation or after launch. So, Topdown partnered with Ricoh USA for print imaging equipment, and Neopost for finishing and mailing hardware. After a lengthy due diligence process, the Bank selected the Topdown-lead proposal.

According to the Bank's project manager, the efficiency and simplicity of correspondence creation drove the selection criteria. In his opinion, although part of the total solution, the printing and insertion components were viewed by the Bank as more of a commodity. CLIENT LETTER® stood out from the competition because of its easy-to-use interactive correspondence features.

The Topdown Professional Services Group (PSG) led the implementation and coordinated with the Bank, Ricoh, and Neopost throughout installation and testing.

PSG first worked with the designated template librarians to inventory the templates and design the optimal correspondence workflow. PSG was able to optimize the template library, breaking templates into reusable components to simplify updating and managing the template library.

PSG then managed the installation of the CLIENT LETTER architecture in a highly-secure environment. The Topdown software integrated seamlessly with the Bank's single sign-on user authentication. The representatives were blissfully

The Results

When it began, the Bank had approximately 1,000 templates. After implementing CLIENT LETTER, all letters are now component-based, where many letters share the same components. The Bank now has fewer than 500 templates, and the project manager suspects that, in time, they will likely further reduce that number.

Centralizing the templates in CLIENT LETTER and introducing a quality-assurance process with the ability to track changes has eliminated "unique versions hidden

“No letter is mass-produced and just sent out; everything is tweaked.”

— Bank IT Project Manager

unaware that parts of CLIENT LETTER were spread across multiple zones that crossed physical locations and thousands of miles.

The Bank used software to restrict access to web applications via web services, so CLIENT LETTER could not call directly into the Bank's database; data had to be pushed from Siebel. Yet the correspondence-creation user interface was fast and responsive.

PSG coordinated with Ricoh and Neopost to ensure all parts worked together as a complete, closed-loop solution. Once the Bank was able to author, print, and track a letter in the test environment, the solution went live.

The new correspondence solution could...

- » Pull data from, and be invoked by, Oracle's Siebel CRM
- » Consolidate templates into a single managed library
- » Quickly and easily customize every letter
- » Put relevant attachments at the reps' fingertips
- » Output to a centralized print and fulfillment center
- » Provide complete transparency and accountability
- » Track correspondence from first draft to doorstep

on remote drives". No more private stashes of templates. Now, representatives all start from the same template.

Managers rely on the ability of CLIENT LETTER to control what text can be edited. Now, operations managers have a complete audit trail, and are able to see how much editing is being done, by whom, when, and why. And the Bank now has an exact copy of everything that goes out, including any attachments, which they can easily access.

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Challenge

- » Templates in hundreds of locations
- » Over 1,000 templates to manage
- » No compliance reporting
- » Lack of any quality assurance controls
- » 40-step correspondence workflow
- » No centralized fulfillment capability

Solution

- » CLIENT LETTER® from Topdown
- » Ricoh print imaging hardware
- » Neopost insertion hardware and postal service tracking software
- » Professional services from Topdown

Results

- » Created a central template repository
- » Eliminated over 50% of templates
- » Established an audit trail of all changes
- » Reduced time to generate correspondence by 70%
- » Collapsed the correspondence workflow by 75%
- » Utilizing a central print and fulfillment center will reduce waste and postage

While the operation's service-level objectives have not changed, the Bank has already discovered the representatives are more productive pushing work through. The Bank's project manager reports that the average time to complete a letter has dropped dramatically—from over 15 to less than 5 minutes, a 70% savings.

Part of the time savings comes from a reduction in the number steps required to generate correspondence. The solution from Topdown, Ricoh, and Neopost has compressed the workflow from around 40 steps to 10, a 75% savings.

The representatives love the ability to dynamically choose attachments from a list that is specific to each template. This saves them from having to remember which attachments apply to each letter, and puts exactly what the reps need at their fingertips, right when they need it.

“The Topdown PSG was always there when we needed them.”

— Bank IT Project Manager

Going forward, the project manager believes the operation could see even more savings. By expanding the use of “no-look” communications, he believes the operation could produce even more correspondence per day. He feels the Bank will likely save on materials (i.e., paper and ink/toner) now that reps are printing fewer drafts, and save on postage due to the new address verification.

The Bank's project manager summed up his experience with the solution so far by saying, “I think you guys have a great product.”



We're Topdown.

For nearly 40 years, we've been filling the document automation and correspondence needs of our customers. No matter how complex. But today we realize it's about more. It's about giving you what you want. Not just our customers, but your customers, too. Communication on their terms—putting the what, when, where and how at their command. We call it *Consumer-Driven Communications*, and it's where the world is going. We know, because we can see it. And we've got the experience to take you there.



Topdown
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