



Using an Automated Document Factory (ADF) to actually save you money

A presentation from
Crawford Technologies Inc.
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Agenda & Objectives

- Introducing Crawford Technologies
- A brief review of what an ADF is and does
- Some of the ways an ADF can save you money
- How do I choose an ADF that meets my needs and goals
 - Provide comprehensive criteria so you can make the best choices for your organization - most of our time will be focused here
 - One size does not fit all
- Wrap up, Q & A





Introducing Crawford Technologies

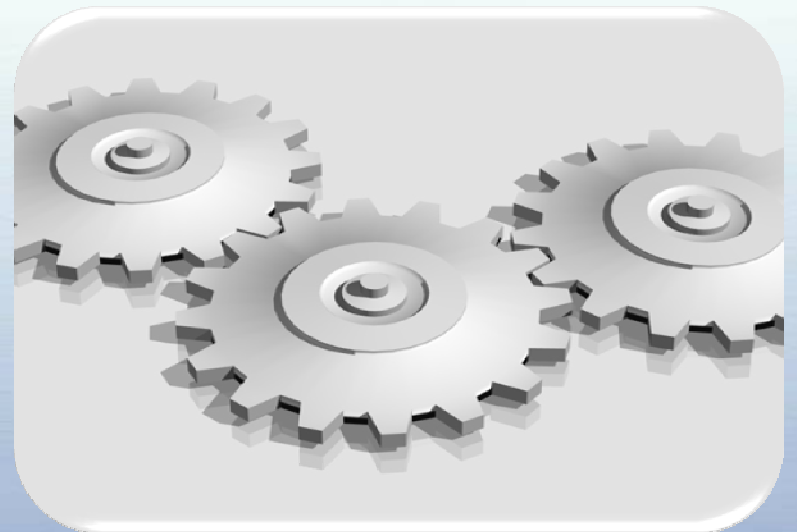
- Founded in 1995 and based in Toronto, CrawfordTech is a privately held global software and services company
- On PROFIT magazine's list of fastest growing companies in Canada 2010 & 2011
- Core competency is in transaction print streams and document production solutions and services, including:
 - Automated Document Factory (ADF) and integrity solutions
 - Document re-engineering solutions
 - Print stream conversions/transform solutions
 - Document archive solutions
 - Document integration/workflow solutions
 - Document Accessibility Services (DAS)





Definitions & Terms

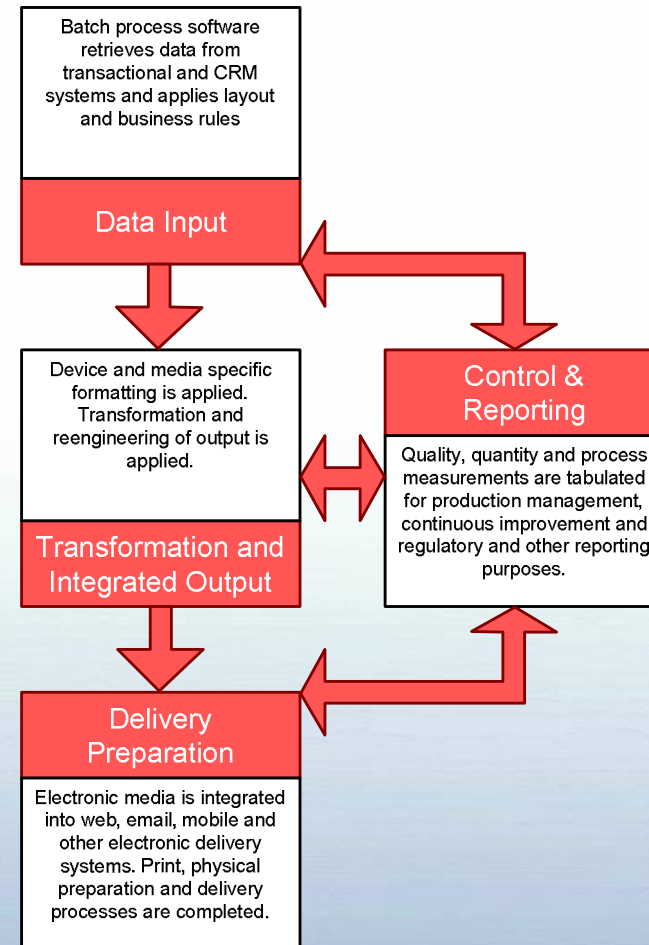
- ADF
 - “An architecture for efficiently and cost-effectively producing transactional customer communication documents”
 - Goal: “To ensure lower costs, higher quality, increased integrity / process controls and reporting”





Definitions & Terms

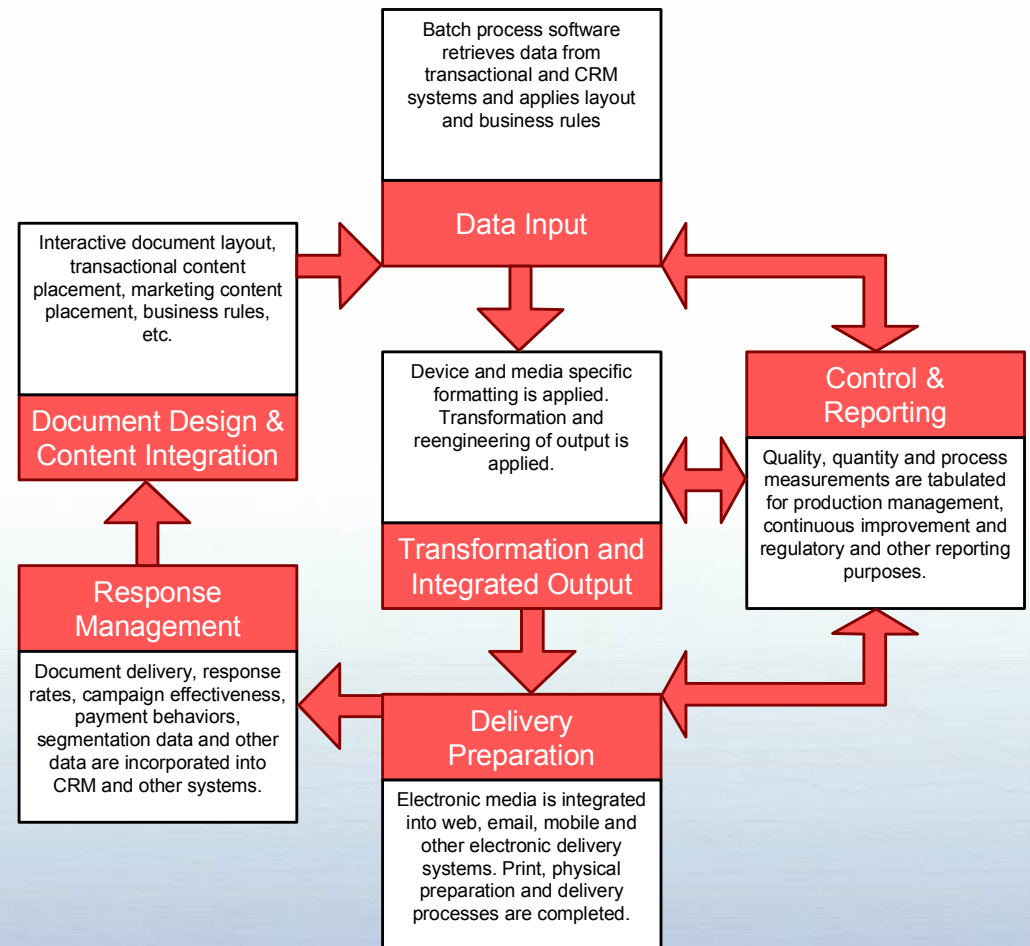
- ADF
 - Defined and named by Gartner in 1995 as:
 - Input – the data enters the ADF
 - Transformation & Integrated Output – production onto appropriate media
 - Delivery Preparation – documents are prepared for delivery to the recipient
 - Control & Reporting – production management of the ADF - sits over the other 3 modules
 - The Interfaces between the 4 modules





Definitions & Terms

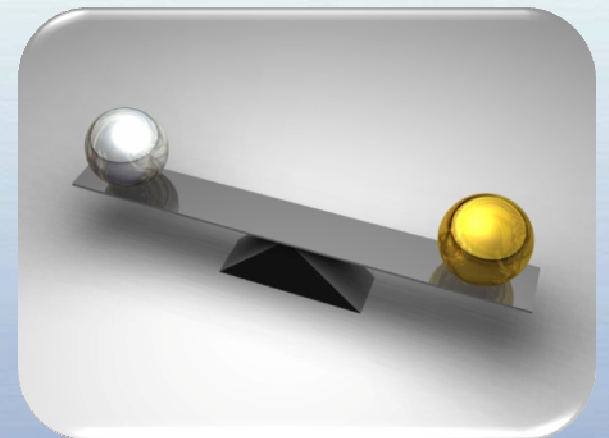
- ADF 2.0 (Gartner 2007) adds two new modules:
 - Document Design and Content Integration – Business rule design & placement of all variable data & messaging components
 - Response Management – Ongoing analysis of customer behaviors to maximize customer lifetime value





Some ways an ADF can save you money

- Automate your processing:
 - Eliminate manual efforts in your processes
 - file transfers, scheduling, 'sneaker net', anything that uses a clipboard
 - Automated reprints
 - Automated statistics gathering and recording
 - Statistics available to easily meet your reporting needs
 - Maximize hardware throughput
 - Load balancing
 - Migrate work
 - To less costly equipment
 - To more robust equipment





How do I choose an ADF to meet my needs and goals?

- What are the initial costs?
- What are the ongoing costs?
- What savings will I see and how soon?
- What results do I need?
- What does success mean for me?





How do I choose an ADF to meet my needs and goals?

- How can I suppress print?
- How can I meet my multi-channel delivery requirements?
- How can I achieve 'document integrity'?
- How much of what I have today can I re-use?





How do I choose an ADF to meet my needs and goals

- Can I upgrade my ADF over time, according to my schedule?
- Can I meet my physical and electronic security needs?
- Can I meet my disaster recovery requirements?





Initial Costs

- Do I need to upgrade/replace existing equipment in order to implement the system?
 - My inserters?
 - My printers?
 - Bindery equipment?
- Mixed vendor shops – **watch out here!**
- Can I use my equipment that is fully paid for, or are there upgrades required?
 - How much will it cost?
 - Will this delay my saving? (ROI)





Initial Costs & Ongoing Costs

- How much will the ADF system's software cost to acquire?
- How much will I pay in ongoing software maintenance fees?
- How much will the *associated* hardware, operating system software, database software and other software costs be?
- How much will I pay in ongoing maintenance and support fees for these aspects of the solution?





Initial Costs & Ongoing Costs

- What will my internal staff usage costs be?
 - How much operational staff will be required for the initial installation and configuration?
 - How much IT staff will be required for the initial installation and configuration?
 - How much Project Management / Business Analysis staff will be required for the initial installation and configuration
 - What is the skill level / cost of the staff required when I'm done?
- What will the external Professional Services costs be?
 - From the vendor – estimated or fixed costs?
 - Other outside resources – estimated or fixed?
 - Be careful of scope creep – get a detailed statement of work (SOW) – get assurances that the SOW is all that is need to achieve your goals.





Physical & Electronic Security

- Internal physical security
- Electronic security – data, authentication, segregation, etc.
- What regulatory and compliance mandates apply?
- What about data encryption and destruction?
- What about Cloud solutions?
 - External connectivity
 - Outages?
 - How much extra work and cost will it be for a Cloud solution?
 - All above questions . . .





Disaster Recovery

- Physical site – power, communications, staff access
- Redundancy – where?
 - Internal to the organization
 - Outsourced production equipment
 - Outsourced ADF
- Business Continuity or Disaster Recovery?
 - One time cost to establish
 - Stationery and other raw materials required, etc
 - Testing and change control
- Cloud?
- How does the ADF solution enable Disaster Recovery?





How does the solution meet MY goals

- In house - prevent outsourcing – keep my job – keep my team’s jobs
- What happens when Saturday USPS mail delivery goes away? Cash flow? Increased daily volumes? How can an ADF help here?
- Service provider – win new customers and retain current customers
- Meet my performance objectives:
 - Save money
 - Reduce print & mailing quantities – go paperless
 - Improve efficiency
 - Reduce privacy errors / improve integrity
 - Reduce equipment, reduce maintenance fees
 - Reduce labor costs
 - Migrate to new, more cost-effective technologies
- Get a promotion
- Get your performance bonus





How fast can savings be achieved?

- How long does it take to get the system implemented?
- Do I need to do a big installation before I will realize ANY savings?
- How modular is the system?
- How scalable is the system?
- How open is the system? Easy to integrate?
- Is the solution printer, inserter, database, O/S, etc. agnostic?
- Exactly how much will I save? By when?





Decision Matrix

Vendor _____

10 is best 1 is worst	A: How important is this attribute to me: 1 – 10 These values will be the same for all vendors	B: How well does the solution meet my needs in the following categories? Different for each vendor	Total: A x B
Initial Cost	8.5		
Ongoing Cost	5		
Ongoing staff costs	8		
Does it meet my success goals	9		
How fast will I see savings	9		
Print Suppression capability	10		
Document Integrity	6		
Automated Reprints	9		
Reporting	3		
Reuse what I have	10		
Implement over time	10		
Physical & Electronic Security	7		
Disaster Recovery	8		

The higher the number the better the solution meets YOUR needs

Total Solution Score:



Decision Matrix

Vendor _____

10 is best 1 is worst	A: How important is this attribute to me: 1 – 10 These values will be the same for all vendors	B: How well does the solution meet my needs in the following categories? Different for each vendor	Total: A x B
Initial Cost	8.5	10	85
Ongoing Cost	5	7	35
Ongoing staff costs	8	8	64
Does it meet my success goals	9	9	81
How fast will I see savings	9	7	63
Print Suppression capability	10	9	90
Document Integrity	6	7	42
Automated Reprints	9	8	72
Reporting	3	8	24
Reuse what I have	10	9	90
Implement over time	10	9	90
Physical & Electronic Security	7	6	42
Disaster Recovery	8	6	48

The higher the number the better the solution meets YOUR needs

826

Total Solution Score:



WRAP UP, Q & A





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