



SEFAS INNOVATION

CUSTOMER COMMUNICATION ORCHESTRATION: NAVIGATING THE CHALLENGES OF CLIENT ONBOARDING

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THROUGH DIVISION OF LABOUR, AND HIGHLY CUSTOMISABLE APPLICATIONS, ULTRAFAST JOB ONBOARDING ALLOWS A LARGE NUMBER OF INDIVIDUAL FILES TO BE MIGRATED INTO HARMONIE COMMUNICATION SUITE (HCS) BY NON-TECHNICAL USERS, SUPPORTED BY FEW TECHNICAL RESOURCES. THE RESULTS OF THIS PROCESS ARE FASTER ROI AND LOWER IMPLEMENTATION COSTS COMPARED TO STANDARD WORKING PARADIGMS.

Effective customer communication orchestration solves the following problems:

- Ultrafast onboarding - take on new client contracts won from another service provider, or merge multiple client contracts into an existing production system.
- Elastic track and merge - easily combine challenging smaller client jobs, across a number of clients of brands. Unlock the savings and profits to be made without any loss of granular control.
- Enterprise visibility - to keep track of all customer communication production across various locations, such as internal mailrooms, external service providers and regional branch networks.

LARGE PRINT SERVICE PROVIDERS (PSPS)

- Large volume insourcing
- Winning business from competitors

SMALL AND MEDIUM ENTERPRISES (SMES)

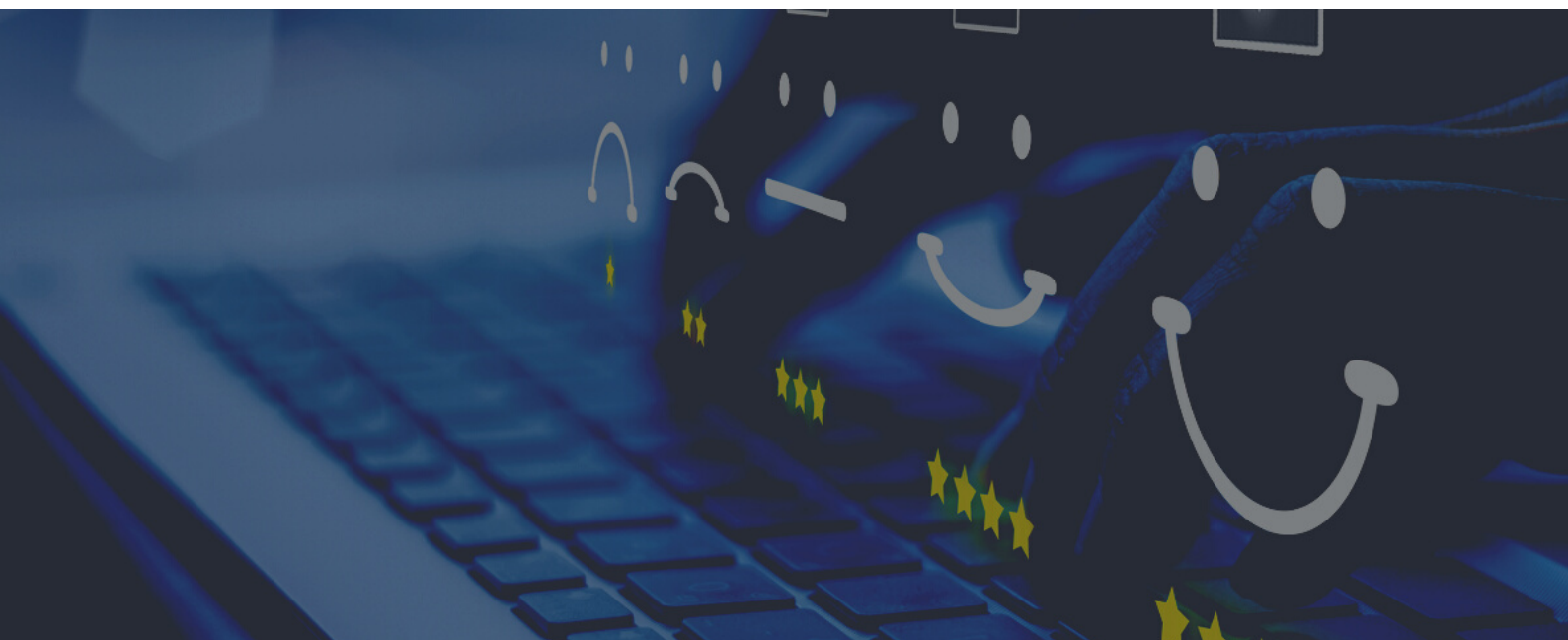
- Processing transactional documents
- Ability to outsource technical requirements

TRADITIONAL PARADIGM: ONE JOB = ONE RE-ENGINEERING APPLICATION

- Scales poorly
- Limited by technical resources

ULTRAFAST JOB ONBOARDING PARADIGM:

- Quickly convert large numbers of jobs to Sefas HCS
- Faster ROI
- Enable participation of non-technical users through configuration
- Lower cost of implementation



CASE STUDY

Expectation: onboarding 20,000 jobs would take 5 years.

Ultrafast onboarding reduced the time to cash to 18 months, increasing profitability.

Insurance Provider had few technical resources but due to the ultrafast onboarding process was able to onboard 400 jobs with only 1.5 FTEs (Full Time Equivalents)

ELASTIC TRACK AND MERGE

Harmonie Communication is able to successfully orchestrate a highly complex set of production rules across production runs of any size. It has the capability to track mailpieces within small jobs (e.g. across multiple councils) that are batched together into much larger jobs with similar production attributes. It can identify each mailpiece within the original small job and within the larger final batched job, to ensure SLA's are not missed.

HCS will also comingle documents from multiple jobs into the same envelope, while making sure sensitive documents are never comingled with non-sensitive documents – all the time keeping full audit track of every document's starting job, right through to its place in the final job within a comingled envelope.

AUTOMATION

For any production facility, automation is essential to reduce labour and increase mailpiece integrity. This is difficult when an operation has no control over the size, format or timing of the incoming data. When looking for opportunities to improve the production process it is best to focus first on documents prior to them becoming a physical piece of paper. In short, an effective approach begins with managing your digital assets before they become physical assets.

HCS provides a mechanised way to automate and optimise the production workflow. It helps to organise production workload to better leverage the throughput of your existing high speed infrastructure and reduce manual labour associated with processing small jobs by hand. Automation is accomplished through a series of activities: "trigger, track and audit", that together provide the complete Automated Document Factory (ADF).

TRACK & TRIGGER

Making improvements and optimising any printing and mailing operation requires visibility into each step of the production workflow. HCS automatically tracks every document throughout the process and records performance statistics at each step. The result is a highly sophisticated mailpiece and performance tracking environment that opens up a world of improvement opportunities:

- **Centrally** catalogue job and production information for workload balancing and reduce dependence on proprietary operator knowledge
- **Track** documents generated by any production stream regardless of distribution channel (print, online presentment, archive, etc.)
- **Provide** closed loop support to call centre enquiries and customer self-service with real time document tracking
- **Reduce** the manual effort needed to generate operational reports and support internal charge back reporting
- **Enable** improved resource planning and automated identification of missing or late jobs

Harmonie Communication provides a unified view of all your devices across every step in the process. An easy to use console lets you monitor production in real-time, establish automated alerts, and report on performance and service levels for both compliance and to enhance productivity.

Harmonie Communication uses predefined job profiles to detail each step of the production process, and triggers to launch the necessary processes to consolidate and enhance the jobs.

- **Predefined** job profiles detail the end to end processing requirements for each job
- **Automated** workflows launch and track process tasks to fix broken applications, consolidate or split production jobs, optimise print streams by enabling print suppression, comingling and pre-sorting to optimise production and achieve higher postal savings
- **Merge** like-processed work to better leverage existing hardware and reduce labour costs associated with achieving operational discounts
- **Automate** reprints to eliminate delays and manual processing required to reissue damaged pages and complete the run

AUDIT

As organisations use ever more advanced techniques to optimise their printing and mailing operations, the ability to audit every step of the workflow becomes critically important. Harmonie Communication provides end-to-end auditing on every process and every piece, so you can be assured that every document made it through process with a high level of integrity and efficiency. Now you have the ability to proactively define service level parameters and actively monitor them throughout the entire production and distribution process:

- Centrally track and automate service level parameters
- Flag late jobs at any step in the process
- Alert operators proactively – before it's too late
- Identify missing or duplicate output
- Automate and consolidated reporting across printing, mailing, online presentment and archive

The auditing capabilities of HCS enable factory-like control across even the most diverse operational environment in a closed loop process – track jobs, monitor and report on service levels, automate reprints, and better manage your devices and people. From end to end, HCS gives you a holistic view and the control to proactively manage your workflow.

ENTERPRISE VISIBILITY

Effective orchestration of customer communications should span all customer communications that are created by an enterprise, both traditional and digital.

Customer communication operations can be found across the enterprise, often within organisational and technology silos, and often with numerous methods and technologies applied:

1. Internal or external high volume centralised outbound document production for structured transactional documents, ad-hoc regulatory documents, or direct marketing campaign documents
2. Internal, or facilities-managed internal or external mailrooms for inbound document management, and outbound low to mid volume regional / branch document production for ad-hoc office correspondence, structured interactive transactional documents, and structured business process driven documents
3. Digital documents sent via digital outbound channels (such as Email, SMS, Social media messaging), or presented on-line via web sites / portals, or through apps for digital devices.



HOW SEFAS CAN HELP

Sefas's customer communications management (CCM) software, Harmonie Communications Suite, enables investment banks to meet these challenges and enhance client experience. Through our software we enable new account opening, account management, statements and personalised correspondence delivered via clients' channels of choice.

We can help:

- **Cut** operating costs
- **Reduce** the risks associated with high volume, on-demand customer communications
- **Eliminate** errors in forms and other documents
- **Avoid** error-prone entry of critical data
- Implement review and approval workflows for documents
- **Ensure** compliance with corporate branding and regulatory standards

Overall, our software can enable investment banks to enhance client experience through well-targeted, omnichannel communications.