

# WHY YOU SHOULD HAVE A DIGITAL MAILROOM

## Take the First Hurdle™ in the Digitization of your organization

A document on why, how and what considerations and questions you should have before embarking on the journey.



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## 1. THE FIRST HURDLE

Digital transformation is the buzz-word and organizations taking their customers seriously, as they should, are very aware of the necessity to 'transform'. But this process has to begin by successfully taking the first hurdle. And that is the mailroom. Moving to a digital mailroom can improve your operational excellence thus increasing your company's and your customer's responsiveness.

But first of all we have to be clear about what a Digital Mailroom is to your business. Is it an all-encompassing solution for an entire organization or should it address specific business issues e.g. mortgage application processing in the financial world or claims process in the insurance environment to name but two examples.

## 2. CUSTOMER IS KING

But why should you automate your mailroom? Basically businesses are built around their customers and without them success is impossible. An easy to understand equation. To be successful you need to keep the customer happy so he comes back to you to do even more business. A key element in this is customer communication and how rapidly you can respond.

The customer has a plethora of ways to communicate – write, fill in forms via the web or via his smartphone. And he is in the driving seat and expects you to deal with it quickly, efficiently and immediately – whatever the original format of the correspondence. If they have to wait, hear nothing, come back to you, repeat the process, hear nothing again, have to explain it to another department, etc. Well then you 're in danger of losing that customer very, very fast.

If you still have an old school mailroom you increase that risk manifold. So what can you do?

## 3. THE MAILROOM BOTTLENECK

Whatever the format, all organizations are confronted with incoming correspondence. Without efficient methods of processing, the mailroom can quickly become a bottleneck. For sure a lot of classical mailrooms are perfectly organized but can they cope with the exponential increase in communication methods and the client's expectation of immediate and efficient response.

While companies invest in IT that makes their business more efficient, the mailroom often gets forgotten. Manual mail processing and distribution keeps on soldiering on. But the most expensive systems – be they CRM, accountancy or order processing – that promote an increase in efficiency and streamlining workflows, will always be hampered unless the incoming data is treated in the same manner.

The mailroom, as the central hub, is the key to the success of the other departments. If information is held up no one can perform effectively or efficiently.

### 3.1. The Traditional Mailroom: starting point of organizational inefficiency

In a traditional mailroom incoming correspondence is analyzed individually to determine the correct destination, person or department. Sometimes the mail is classified again at the destination where it is distributed again to the right contact, who will then key in the information into a specific IT system (because you invested a lot in state-of-the-art and very efficient software). The journey of one piece of correspondence is long and uses a multitude of resources creating unnecessary costs. Sounds familiar?

### 3.2. Lack of Uniformity

Emails (with or without attachments) , paper letters (ditto), web forms, faxes, etc. can all be classified as correspondence. However they do not enter the organization in the same way: paper-based most of the time in the mailroom but electronic based information is sent directly to the right contact person.

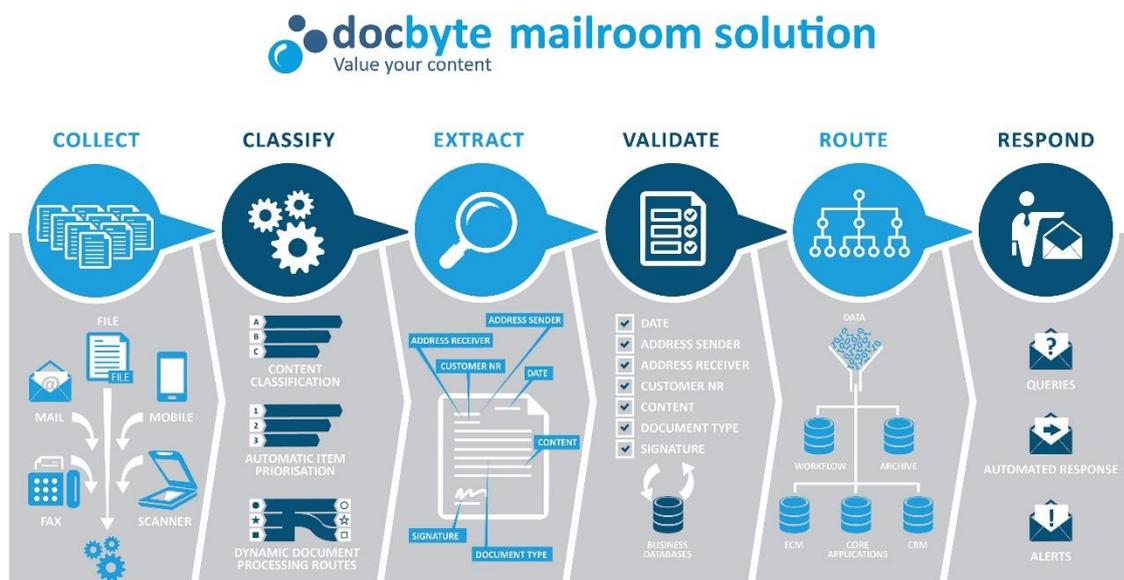
It is also possible that different entry-points are used for the same business critical information. Let's say a complaints letter coming in by post and via a parallel email. The email is immediately processed via the CRM system while the paper-one has to go through the tedious process described above. The response to email can be monitored and can be evaluated versus the KPI of the company. and subsequently improved upon. This is a lot more difficult for the paper one as it is stuck in the mailroom and the relevant department depends on the efficiency of the mailroom. It therefore cannot be accountable for not making its KPI as the control was out of its hands. Lack of uniformity hampers best practice.

But it also denies the organization to prioritize its mail flow. Different formats make this virtually impossible and e.g. the complaint letter in the mailroom can be stuck between invoices, applications, change of address requests, etc. A common basis is essential to apply sound business rules and avoid unhappy customers that will be contra-productive for your business success. Sounds familiar?

## 4. THE DIGITAL MAILROOM

What is it really? Digital mailroom is the automatic processing of all incoming documentation. A very important little word in this description is ALL. A true mailroom solution has to cater for all incoming sources. So one could argue that a 'unified platform solution' is ideal where the same inter-operable principles are used across the mailroom. The original format (paper, email, fax, web-form, etc) is irrelevant as is the document type (purchase order, complaint, vendor invoice, request, etc.). When the same solution handles them all this means efficiency of process and an easy ability to expand the technology across the business as your needs evolve.

So your mailroom automation solution takes incoming communications from a heavy, outdated, error-prone and costly manual sorting. And replaces it with a system where all information is captured at the point of entry and streamlined through the organization. Data is extracted and exported to the relevant business systems (ERP, CRM, IT, ...). No delays but immediate action and seamlessly integrated with all your business applications.



## 4.1. Why Mailroom automation

**One process flow for paper and electronic mail**

Information is streamlined regardless of its original format. The same rules apply for all types of information regardless of their origin

**Faster response times to customer requests**

The necessary basis for faster responsiveness to act upon business critical information

**Increased customer satisfaction**

Quick and efficient communication with customers on their platforms of choice increases satisfaction and retention.

**Reduced decision cycle times**

No waiting and no delays as the necessary information arrives to the right recipient. Ability to consult relevant ancillary information improves action with full dossier knowledge.

**Streamlined information circulation**

Enables straight-through processing for standard tasks: from capture to response

**Reduced operational cost**

Automation reduces costs in the mailroom and through the organization because one only receives what one needs to act upon

**Ensured data tracking**

Unified data enables improved workflows, increased efficiency and the possibility to monitor and adapt KPI's.

## 5. KEY QUESTIONS

So you're ready to automate your mailroom. You're enthusiastic but before you dive in you should prepare and provide answers to a few questions:

- Do you really know what is coming in?
- Do you have records of how many documents arrive daily in your organization? Be it in electronic or paper form? Is an additional audit necessary?
- How many people are employed receiving, handling, sorting, processing and dispatching (internally and externally) documents?
- Is their workload growing, is it fluctuating?
- When do documents reach their destinations calculated as from their initial entry?
- Do you prioritize content? And if so how? If not, is critical information processed late?
- Do documents reach the right recipient?
- Are there many mistakes? Is human error a huge factor in manual classification. Is the security of critical data safe?
- How many man-hours are lost in rectifying mistakes?
- Are your experienced staff losing time and growing frustration to correct errors?

## 6. KEY CONSIDERATIONS

### 6.1. Classification

All organizations receive information in the following formats:

- **Unstructured:** Can be handwritten but also documents who do not follow any structure, template or format.
- **Semi-structured:** Documents with predictable elements but in unpredictable locations
- **Structured:** Predictable data types and location

Incoming correspondence can be related to (a) specific department(s) – finance, HR, customer service, marketing, . – or market specific – insurance claim, bank account, etc.

Mailroom Automation must be capable of capturing, reading and correctly routing all these different documents types and formats. As the gateway it has a huge impact on the subsequent workflow.

The solution therefore has to be able to understand all the data in the document to avoid errors and the subsequent time-consuming resolution. To be as accurate as possible it has to be able to examine the format and other visual elements as color, signatures, barcodes etc. and the analysis of the actual content.

Different methods are available to automate this classification but you should look for a system that can handle both structured and unstructured documents in order to reduce implementation time and ensure continued flexibility of the mailroom.

### 6.2. Extraction

Recognizing data is key for an effective digital mailroom. The task at hand to extract data and to deliver it to the right recipient is key for the success of the automation effort. How the data is recognized is therefore of the utmost importance as it will affect the accuracy of the process. Moreover the quality of the recognition is directly related to the amount of human intervention and number of corrections down the line.

A solution automatically capturing the data and validating it against existing data in the internal and external databases will provide the best flow of information. The solution should be able to recognize:

- **OCR:** Optimal Character Recognition
- **ICR:** Intelligent Character Recognition
- **OMR:** Optical Mark Recognition
- **Bar-codes**

You should carefully look at a solution that can give you the tools to extract the data as accurate as possible.

## 6.3. Distribution

Distribution to the right department, person, back-office system, etc. is the whole point of the solution. That process should be effortless and flexible. Setting rules for distribution should be easy to set up. You should look for a system where you can set priorities based on type and content of the documents.

Moreover, to ensure the security of your data you should look for a solution with an effective and easy-to-use authorization and validation system. Many industries operate strict rules for mail and who can look at what.

## 6.4. Reporting, auditing and analytics

Mailroom automation enables effective reporting, auditing and analytics; everything is tracked from entry to exit. This information can be linked to specific KPI's and provide the basis for constant improvement, in response times and service levels. Losing information becomes part of the past as a transparent auditing trail is easily tracked. So look for a comprehensive solution that meets your needs now and in the future.

## 7. CONCLUSION

A Mailroom Automation Solution enables an organization to process all its documents and have them delivered to the right recipient fast and reliably. The benefits are obvious as the phase-out of manual sorting – costly, slow and prone to error - is providing a new opportunity to increase productivity, a more efficient handling of requests, increased transparency and traceability and, let's not forget, a reduction of costs.

Embarking upon this journey however needs some preparation and a realistic view of your needs now but certainly in the future. Spending some time now in gathering your thoughts and making a list of your requirements will ensure that the implementation with the right solution provider will ensure that the full effect of your digital mailroom will be tangible in the shortest amount of time and never to look back.

# THANK YOU !

## CONTACT US

Docbyte NV  
Poortakkerstraat  
35 C 9051 GENT

+32 (09) 242 87 30  
[info@docbyte.com](mailto:info@docbyte.com)  
[www.docbyte.com](http://www.docbyte.com)