



Unlock the hidden value of your customer communications
with Document Dynamics from CFH

Welcome to the future of customer communications



Like most organisations, you probably don't realise just how much potential there is in your document processes for cost savings, service improvements and revenue gains.

Whether it's bills and statements, sales letters, or any other written communication between your organisation and the outside world, CFH uses Document Dynamics to help you unlock the hidden value.

Slicker workflow

We start by working with you to redesign your document workflow, and then we manage the whole process on your behalf. As a result, you can achieve dramatic cost savings – often as much as 50 per cent, sometimes even more.

We develop web-based systems that allow your staff to compose and manage documents in digital form. You

retain full visibility of your documents, and have access to instant management information. When it's time to produce hard copy, we print your documents, personalise them and ensure economical despatch.

Smarter documents

As well as making the process faster and more efficient, Document Dynamics helps you exploit the full potential of your customer communications.

You can tailor your documents to individual customers by including personalised sales messages, graphics, colour and mechanical features, and enclosing inserts in line with customer profile. In doing this, your documents become powerful sales and marketing tools that raise customer perceptions and drive revenue.

With Document Dynamics, you'll get more from your documents than you ever thought possible.



DocGen

*System-generated documents
e.g. invoices, statements, application forms, confirmations of product purchase*

- Efficient management of high-volume documents for large customer bases
- Major cost savings from volume efficiencies and mail management
- Can be personalised with individually targeted messages

DocManager

*Documents issued by individual staff
e.g. responses to requests for information, sales letters*

- Security-controlled online access to documents for authorised staff
- Control over content and presentation of documents via lockable templates and version control
- User-friendly editing tools (e.g. Microsoft Word)
- Volume efficiencies from central printing and mailing

DocStore

Digital archiving of documents

- Instant access to easy-to-use digital document store – very useful for customer-facing staff
- Inbound documents can be added to DocStore and processed via further document workflow
- Can also store internal documents (e.g. policies, work instructions) to be viewed and edited by staff, with change authorisation and version control procedures

CFH Document Dynamics services

Document Dynamics in action



What you get

- You can cut the cost of your document processes by 50 per cent or more while exploiting the full potential of your customer communications
- You have control over your document workflow, from managing templates and the rules we apply to your customer data through to checking and changing individual documents
- You have instant access to real-time management information about your document processes, including costs, so you can track performance and take corrective action
- You have instant access to your document archive so compliance with processes and standards can be audited
- You no longer need to tie up cash in having your own printing resources and holding stationery on your premises
- You get peace of mind from knowing you're dealing with the UK's leading document management provider

What your staff get

- Your staff have easy access to your documents – both current and archived – via a secure web interface
- Your frontline customer service staff can view all the documents relating to an individual customer so they have everything they need at their fingertips to provide great service
- Wherever they are, authorised staff can create personalised customer documents from a family of templates and pick the right inserts. Of course, you can fix key elements of the document, and check and approve all mailings before they go out. And you have a full version history and rollback options.
- Your staff no longer have to waste time printing, enclosing and mailing documents and so have more time to do what they're best at – dealing with customers and making sales



What we do for you

- We redesign your document workflow and manage the end-to-end process. We develop systems to allow your staff to view documents online, and to compose, amend and authorise them. When it's time, we print your documents, personalise them and manage despatch. Of course, we get economies of scale from doing all this under one roof, and we pass these to you in reduced costs.
- We consolidate different communications into single documents and mailings, and make the most of Royal Mail discounts to secure big savings for you on postal charges
- We manage a DocStore digital archive of your documents, and you have instant access to it via a web interface
- We can provide your documents the way your customers want them – on paper or in electronic format
- We hold any stationery stock that's needed and keep this at minimum levels

What your customers get

- We add tailored sales messages to critical documents such as bills, reminders and statements – helping you secure a greater share of your customer's spending
- You're able to keep customers informed at all the important stages in their transaction with you, which improves their perceptions of your organisation and reduces incoming queries
- Customers receive related communications in a single mailing, and so they see you as more joined up
- Because you control your document templates, you can be sure your brand and key messages are being communicated consistently – even when documents are composed by staff working on their own initiative and across many locations
- When customers send back forms and other documents, we digitise and index them and then process them through document workflow. Digital versions are available to you instantly via our DocStore digital archive.

Proven solutions



"Over the past three years, CFH have made a real contribution to our productivity. They opened our eyes to a whole new way of running an important part of our marketing operation, and we're really pleased with the quality and service we receive."

Nick Jemetta, Senior Marketing Executive, Reed Employment

Local composition, central printing: a breakthrough in direct mail

We developed a pioneering direct mail solution for Reed, the UK's leading specialist independent recruitment company.

Previously, Reed consultants at more than 200 branches sent direct mail to clients and jobseekers independent of central control. After working with the Central Marketing team to compose documents, they would then print, finish, enclose and post the direct mail. This often took extensive amounts of their time and diverted them from their core role of serving candidates and clients. The total cost of this direct activity across the company was significant.

In addition, mailings were inconsistent in quality and sometimes failed to fit the Reed brand guidelines and brand values. What's more, management had little visibility of the mailing activity taking place or how effective it was proving.

The DocManager solution we devised involves local composition of documents and central printing and despatch.

We built a user-friendly website interface enabling Reed consultants to submit targeted mailing lists before composing letters and other direct mail using a range of templates and appropriate inserts. There is an automated process that alerts designated

managers of mailing activity so they can review, authorise, change or halt production online and in real time.

Every day, we harvest the data submitted by Reed to the web interface, and produce and distribute that day's mailings.

We also make available real-time management information so Reed can monitor and improve the effectiveness of its direct mailing activity.

Benefits:

- Significant print and postage cost savings, including reducing the requirement for pre-pay franking machines in Reed offices
- Staff released from monotonous mailing work to focus on core job role – productive selling time increased by around 15 per cent
- Mailings more targeted, effective, consistent and successful
- Mailing capacity increased
- Huge reduction in branch stockholding
- Full visibility and control of mailing activity and cost



"Thanks to this innovative design and print solution, which sees CFH work closely with our teams to produce personalised customer communications of the highest quality, we are able to regularly communicate with our customers in a way that improves perceptions, and enables our business to run even more efficiently."
Sandy Watt, Sourcing Manager, National Australia Group (Europe)

Complete customer communication for bank customers

We have applied DocGen to create a complete customer communication solution for National Australia Group (Europe), owners of Clydesdale Bank and Yorkshire Bank. This involves more than 70 million secure documents a year being personalised, printed and mailed to NAG's UK customers by CFH.

Credit card statements

We manufacture stationery, infill data and personalise statements according to cardholder profile. This can include tailored payment instructions and marketing messages. We also handle all mailing of up to 70 million statements every year.

Our creation of dynamic statements has greatly reduced cash collection time and encouraged cardholders to spend more on their cards.

Customer letters

We manufacture letterheads, personalise mail as required by NAG's marketing strategy, and then manage distribution. Our systems enable us to combine letters with routine mailings such as statements, thus reducing postage costs.

Document warehousing

We maintain electronic records of all the documents we

produce. Through a secure DocStore website, staff can view and interrogate documents. This is particularly useful for call centre and branch staff when dealing with customers.

PIN advice

We manufacture, personalise and distribute PIN mailers to Clydesdale Bank and Yorkshire Bank customers for internet banking, cash machines, debit cards and credit cards. As one of the UK's largest manufacturers of PIN mailers, we provide the complete data and document security required for this work.

Benefits:

- Increased revenue
- Improved cash collection
- Better customer perceptions
- Major operational cost savings
- Major stationery cost savings
- Greater security
- Complete and easy-to-access electronic document archive



“Helping the largest local authority in Europe communicate better with local residents while improving efficiency”



Supporting value drive in local government

DocManager from CFH is helping the largest local authority in Europe communicate better with local residents while improving efficiency behind the scenes.

We have built a web-based system for the authority that allows its officers to compose documents to be sent to residents. These cover everything from Council Tax reminders to notifications of upcoming work on local roads.

Staff select from a large range of partially locked document templates that have a predefined layout and fixed elements such as the Council's logo, layout, contact details and key messages. They adapt the text of the document to recipients' needs and specify appropriate inserts. They then create mailing lists quickly from a database of local residents.

Mailing requests are automatically sent to designated managers for approval or amendment. Also, authorised staff can change templates, and there is full version control and the option to rollback changes.

Every day, we harvest the data submitted by the Council through the web interface and then print, produce and post

the required mailings. We also maintain a DocStore digital archive of the Council's documents.

To meet mandatory standards, the Council has to check a set proportion of the key documents it sends out such as benefit statements and Council Tax demands. Prior to our involvement, it would reprint 10 per cent of its document output and check it as documents were being mailed to residents. With CFH on board, the process is far more efficient. Before printing, we give the Council online access to the 10 per cent sample in digital form. If this reveals errors in Council data, mistakes can be rectified before print and despatch. This provides major savings on print costs, and stops inaccurate documents being sent to residents.

Benefits:

- Massive print and postage cost savings
- Staff released from mailing work to focus on core activity
- Better customer perceptions
- Improved cash collection
- Reduced stockholding
- Full and auditable digital record of written communication with residents

Our capabilities

CFH is the UK's leading provider of outsourced document management services. Over the past 10 years, we've devised pioneering document solutions for major financial services firms, utilities and local authorities.

Our industry-leading software development team can develop bespoke systems that harvest key information from your data streams, while giving you total visibility and as much control as you want over your document process.

This is backed by a unique printing and manufacturing facility. From under our one roof, we offer full-colour offset and laser printing, integral cards and labels, finishing, enclosing and mailing.

We operate a high-security manufacturing plant accredited to the BS7799 information security standard and APACS security printing standards.

Our commitment to quality is reflected in our accreditation to the ISO 9001:2000 international standard for quality management and the QMP quality standard for mail production.



Will Document Dynamics deliver for me?



Document Dynamics is for you if any of the following apply to your organisation:

- You provide regular financial information to customers (e.g. bills, reminders and statements).
- You have a legal duty to send documents to customers, and you need a fully auditable process.
- You need to communicate with customers at key points in a transaction (e.g. when they're applying for a product).
- You want full control over documents generated by your staff across geographically dispersed offices.
- You want to redesign document workflow to improve efficiency and reduce cost.



Talk to us

Contact us today and we'll help you explore how Document Dynamics can unlock the hidden value of your customer communications. Our contact details are on the back cover.



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