

# Kaye-Smith

## Proactively Growing the Business

Kaye-Smith has been a leader in the document outsourcing business for 20 years, rising from a small Seattle-based business forms manufacturer to a company that designs, prints, stores and distributes every kind of business document in nearly every conceivable way for companies doing business domestically and internationally. Its founder, Lester Smith, has long espoused the philosophy of investing in good people and state-of-the-art technology. This philosophy has led the company to develop into a diverse organization capable of offering a complete suite of products and services.

The company provides document outsourcing services to a wide variety of industries including financial services, insurance, healthcare, banks and credit unions. Kaye-Smith wanted to bring its financial statements to the next level with the ability to insert personalized messages, graphics and cross-sell marketing campaigns into statements at run time. To do so, it recognized the need for a comprehensive software solution to create, manage and deliver these types of sophisticated document applications.



### FINDING THE RIGHT SUPPORT

"We wanted to start developing transactional statements that offered more relevant customer information and were easier to read and understand," said John Davila, manager of the Database Group at Kaye-Smith. "The software solution we were using was limited. To accomplish what we wanted to do, it was important that we find the right product and the right company. So we went on a search."

Kaye-Smith's management team narrowed down the alternatives to three companies—including Exstream Software and its enterprise personalization software, Dialogue. Each was asked to produce a proof of concept. "The Exstream team did the best by far," said Davila. "They took our specs—a utility bill—and not only met our requirements, but surpassed them by acting as consultants right out of the gate. They showed us how to add value by using other types of graphs and tables to make the statements even more personalized than we planned. They also showed us how to rearrange information to make the statements more understandable. We can be a tough crowd here when it comes to vendors. In fact, we held out on a few things we wanted to accomplish and then asked for them during the demo. The Exstream representative said 'no problem,' and made the changes on the spot. The competition struggled to do the same. We were all very impressed with Exstream."



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## DIALOGUE DELIVERS

Kaye-Smith immediately began to enjoy the flexibility, speed and ease of use Dialogue delivered. Responding to the growing opportunity in the variable data market space, the company now takes advantage of Dialogue's advanced campaign management capabilities to offer personalized document solutions—using available white space as valuable real estate for inserting targeted marketing and informational messages according to specific customer profiles. Campaign messages can include variable text, charts and images that are dynamically incorporated into documents at run time.

"The short learning curve was amazing to us," noted Davila. "With other products you might have to take three to five steps to do the same thing you can do in one step with Dialogue. And the speed is phenomenal. Dialogue's high-performance engine has reduced processing time for many document applications from 24 to three hours."

"We selected Dialogue to add value to our financial statements, making them more relevant and understandable with targeted messages and graphics. Now we are doing so much more than that. For example, we are producing an extremely complex piece for a large non-profit organization that provides relief throughout the world. Part of the project includes donor statements with more than 525,000 dynamically selected images based on donations, language requirements and personalization down to a certain child in a specific location. Dialogue makes a project like this possible."



## NEW WAYS TO GROW

Kaye-Smith is also taking advantage of Exstream's Application Solution Center (ASC) to handle its business growth in a creatively efficient and cost-effective way. A worldwide service offering, the ASC is staffed by a team of Dialogue specialists working collaboratively to deliver full-service, turnkey solutions for customers—from converting legacy document applications to creating new ones using Dialogue. This service has allowed the company to take on more business, accelerate time to market for certain time-sensitive customer communications and free up key resources to focus on other core projects.

With the help of Dialogue, Kaye-Smith is growing its business by offering value-added services that include very complex variable data document solutions.

"Dialogue's robust features make it possible for us to grow in a very proactive way," continued Davila. "We selected the software to add value to our financial statements, making them more relevant and understandable with targeted messages and graphics. Now we are doing so much more than that."

Kaye-Smith is a leading-edge enterprise committed to providing personalized document solutions to a very diverse set of customers, when and how they need them. Dialogue is the perfect technology to accomplish this due to its single infrastructure that provides the breadth and depth of functionality to support a company's constantly evolving customer communication requirements.



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