

# HP Output Management completes your HP Enterprise Document Automation solution



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## Executive summary

Personalized communication means interacting with every one of your customers or sales prospects on a one-to-one basis. You want to make each individual customer feel that you have taken the time to locate the ideal offering just for him or her. These communications can help build loyalty and generate new sales, from both existing customers and new prospects.

Two of the greatest challenges for personalized communications are speed and cost effectiveness. While you can dedicate a sales team to your large accounts, you cannot dedicate a team to every customer, nor can you invest the time and resources to create unique communications from scratch for every customer.

The HP Enterprise Document Automation solution allows you to create and deliver personalized communications to thousands and tens-of-thousands of customers quickly and cost effectively. It can pull pre-approved content and data from your transactional systems such as mySAP, Oracle® E-Business Suite, Customer Relationship Management (CRM), Sales Force Automation (SFA), or Enterprise Content Management (ECM) applications. It uses the data to create personalized content then formats and delivers it to designated destinations.

The HP Enterprise Document Automation engines for gathering content and formatting it are Dialogue and Dialogue Live software from Exstream Software by HP. The HP Enterprise Document Automation solution helps you:

- Provide personalized, relevant communications to thousands of customers
- Enable rapid response through interactive correspondence
- Ensure consistency across your brands
- Reduce the cost of communicating

An HP Output Management solution is an intelligent layer that resides between your enterprise business applications and your output destinations. It completes your HP Enterprise Document Automation solution by helping you:

- Deliver output to locations that help you streamline your processes and improve efficiency
- Simplify and optimize your output infrastructure
- Get your documents there every time on time
- Handle output in virtually any language
- Enable single-step, fleet-wide upgrades
- Manage your entire enterprise output fleet efficiently
- Reduce costs and achieve high ROI over a three-year period
- Improve business performance through greater reliability and adaptability
- Increase user satisfaction and productivity
- Simplify compliance with legal and environmental directives

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## Make your communications compelling and actionable through personalization

Successful business communication makes every customer feel like an individual. If you can make the customer believe you understand his or her goals, and you have taken the time to put together a package that reflects those goals and aspirations, the customer will be more likely to respond to your communication and take the action you want. For example, you are trying to build loyalty by making a high-wealth client feel valued with a personalized account summary or by sending an accurate response letter from your call-center representative who handled the client's call. In other cases, you may be trying to generate new revenue such as when you submit a sales proposal or attach a well-targeted sales promotion to a monthly bill. Another example is attaching a promotion for a three-day weekend to a couple that has a history of buying plane tickets and travel packages, while presenting information on Florida condominiums to seniors in the mid-western United States.

What you don't want to do is to make the customer feel unimportant by sending a potentially irrelevant form letter or a sales proposal that has pricing or naming errors.

### Build cost-effective processes

Your personalization processes must be profitable. That means appropriately matching your resources to the size of the revenue opportunities. For example, enterprises commonly dedicate one or more people to large accounts that generate several million dollars of revenue annually. Dedicated personnel have the specific customer knowledge and can invest the time necessary to generate highly personalized communications. However, the economics are different when you are servicing the thousands or tens-of-thousands of customers who fall below that revenue level. You want to generate personalized communications for these accounts without increasing your costs to the point that the accounts are not profitable.

### Exceed customer expectations for responsiveness

This means that you must do things faster than the customer expects. You must also do them faster and better than your competition. With monthly billings or financial statements, it simply means getting the bills out the door on time. In other cases, it means rapid creation of a customized communication, such as a letter that responds accurately to a customer query.

When designing fast-response personalization processes, you have to pay particular attention to approvals and reviews. You don't want your customer communications to expose the company to legal difficulties, nor do you want them to make promises that your company cannot keep. You want all appropriate parties, such as your marketing, product management, and legal departments, to approve your customer communications before you send them. You also don't want to make the customer wait too long while you circulate the communications through internal review.

### Overcome the hurdles of complexity and proliferation

Complexity is one of the greatest barriers to personalized communications. As organizations grow in size, internal departments grow, chains of command get longer, cross-functional cooperation becomes more time consuming, and narrowly-focused short cuts develop to sidestep lengthy consultation or approval processes.

In your IT department, databases multiply as you implement more applications, making data consistency a concern. For example, price lists. How many different lists are there? If your company is like most, you have many databases with prices in them. What complicates things is that these databases are in constant use. Different applications and different functions regularly access different databases in the course of normal workflows to retrieve what is essentially the same information. Keeping everything consistent and up-to-date is a never-ending job.

Forms are another area that can grow and multiply uncontrollably. For example, a department finds that the standard 'corporate' form doesn't quite fit their needs. Perhaps it does not have the right column headings or the fill-in boxes aren't the right size for their product line. Whatever the reason, the department creates and stores a new version of the form to meet their needs. Multiply this process by a hundred or a thousand, and you have an avalanche of forms that are locally created and controlled. Brand management can be an obvious casualty. Plus, the added storage and management adds to overhead costs.

## Be dependable

Dependability means meeting expectations and commitments. If you say that you are going to send a letter in response to a customer query, you need to send the letter on time and with appropriate information. This is not the same as sending a monthly statement or initiating a continuous stream of unanticipated marketing communications. The key elements here are that you have made a commitment voluntarily, and the customer knows that you did. Fail to meet that commitment, and you have a customer who no longer thinks you value him or her. One unfulfilled promise can cancel many positive experiences.

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## The HP Enterprise Document Automation solution

The HP Enterprise Document Automation solution is designed to create, format, personalize, and distribute documents that improve the customer experience. It enables variable data publishing that can lead to one-to-one communications with thousands or tens-of-thousands of recipients. Your communications become relevant, targeted, and compelling.

Dialogue and Dialogue Live software, from Exstream Software by HP, are solution platforms that bring together content and assemble that content into formatted documents. These software solutions have interfaces that connect to databases and applications throughout your data center environment. These links allow Dialogue and Dialogue Live to pull information from databases generated by your transaction systems such as mySAP, Oracle E-Business Suite, CRM, SFA, or ECM applications. Dialogue and Dialogue Live software utilize numeric, graphical, and written content from many different sources to create customized and personalized messages based on things like buying patterns and customer profiles.

Dialogue and Dialogue Live software collect the data and content pieces, insert them into templates according to pre-defined business rules, and convert the aggregate document into a single format such as a PDF file. The result is a document that is ready to send and can be unique for every individual customer.

## Dialogue, one-to-one communications to all your customers

Dialogue software is a comprehensive platform for building and deploying document automation processes across the enterprise. It enables you to create relevant and timely communications that connect with your customers at every touch point.

Dialogue is especially well suited to automated, high-volume environments because it is scalable and provides high throughput. Dialogue and Dialogue Live software are designed with open standards. They come with dozens of connectors that allow you to interface the systems to transactional systems, legacy systems, ECM environments, and more. And as always, you can depend on HP to scale its solutions to your enterprise requirements.

Dialogue pulls information according to the business rules you define and fills the fields in a pre-created template with the collected information. The business rules and the fields available in the template control the degree of personalization. The more granular the business rules and the larger the amount of process-controllable space, the greater the degree of personalization you can achieve.

While it takes some technical skills to set up the original templates, defining the business rules Dialogue uses to create the document is exceptionally easy and straightforward. Marketing and other business units can do this critical part of the process themselves, even via a web browser.

For example, marketing staff can create customer-screening rules that the system uses to select a promotion from a list. Dialogue will then place that specific promotion into the proper field of a monthly bill, creating a document personalized to that single customer. Marketing can redefine these rules periodically to keep the communications fresh and interesting.

Marketing can control their campaigns directly, without additional programming, so they can respond more quickly to the marketplace, accelerate processes, and reduce costs.

## Dialogue Live, for real-time situations

Dialogue Live software is also a platform for creating personalized documents. While you can use it in any situation that would benefit from personalized communications, its capabilities deliver the greatest value in situations where you want to create a single personalized document in real time. For example:

### **A sales representative needs to generate a proposal for a client**

Using Dialogue Live, the sales representative brings up the basic template for proposals, inputs the customer's name or account number, which can immediately go into a CRM database. Dialogue Live uses the entered data to retrieve additional details from other internal systems to collect and bring in the remainder of the customer data. The proposal is built from pre-written, pre-approved proposal sections. The system uses the stored sales information to fill in blanks in the selected sections, pulls up the most recent product and price lists, assembles the pieces, verifies that no pre-requisite products are missing, and formats it into a customer-ready proposal that is pre-approved, error-free, and reflects a highly professional look and feel. Dialogue Live documents are portable and function off-line with intelligence and control, allowing for adjustments without compromising branding or compliance, while eliminating errors.

### **A call-center representative handles a customer call**

At the end of the call, the representative pulls up a template in Dialogue Live and selects pre-approved sections appropriate to the just-finished call. The system retrieves customer information entered by the representative during the call, puts information into the selected sections as appropriate, formats the final document and sends it to the designated output device. The result is a letter, created in real-time, that is customized and responsive to the customer's call.

The IT department or a business unit can establish rules that govern who can do what, and which areas of the template people can change. For instance, in the second example above, you can allow the call-center representative to choose what to place into some areas of the standard customer letter from a list of pre-approved content, but not allow changes to other areas.

## How an HP Output Management solution delivers reliability

Dialogue and Dialogue Live give your company the capabilities to communicate cost-effectively with your customers as individuals. By using these software applications, you are no longer limited to issuing customized communications for the few large accounts with dedicated sales representatives, but now you can engage all or nearly all of your accounts on a very personal, one-to-one basis.

Yet there remains a step that you must address before you have a complete solution: reliable delivery to output devices.

### **What is the concern?**

By default, document automation systems use the lp (or lpr) printing process created for the UNIX® operating system in the 1970s and never updated. There are two things wrong with this flow:

1. The UNIX print process has flaws that allow it to 'lose' (i.e. fail to deliver) documents. It compounds this error by not keeping any log or sending any notification about the documents lost. It simply purges them from the queue.
2. Regardless of whether it prints or not, there is no permanent copy of the document.

The second point is easily remedied. Most releases of UNIX allow you to request 'SAVE' as an option in the print command. Using this option, you get a permanent copy of the document if it prints successfully. A step forward, but it does not address the basic problem of 'lost' documents.

### **How does an HP Output Management solution resolve the concern?**

An HP Output Management solution does not rely upon the UNIX or Microsoft® Windows® print processes. Instead, it uses its own processes and queues. Further increasing its reliability, it tracks and logs every document until delivery is complete. If there is difficulty with any delivery, it can do several things automatically: retry, redirect to another output device, send a notification to the appropriate administrator, or 'hold' until the difficulty is resolved.

### **How does this make a complete solution?**

The objective of any customer communication is that it gets to the customer. Personalized communications can help you build customer loyalty and generate new and additional revenue -- but only if the customer receives the communication and receives it on time.

Once again, consider the example of the call-center representative. A customer will almost certainly appreciate a responsive and informative letter that comes as a result of an interaction with your call center. However, if no letter arrives when promised, you have a customer who now questions your company's interest, as well as questions your ability to deliver on commitments. Since the representative is not sitting next to the printer and cannot personally verify successful delivery of the document, your company's reputation depends on the reliability of the print processes supporting the application.

With an HP Output Management solution, it is simple: the letter prints and goes into the outgoing mail. You now have a complete and reliable solution for creating and delivering personalized communications.

## **Effective personalization solutions**

### **Cost-effective personalization processes**

You can set up the HP Enterprise Document Automation solution to tap into knowledge bases throughout your organization, giving it comprehensive, accurate, and immediate knowledge of your offerings and your customers — subject to privacy limitations. From that, the solution can generate communications as personalized and in as high of volumes as appropriate to the situation. Once, a process is in place, content changes come from modifying the process-defining business rules, a step that is easily done by business groups such as marketing or customer service. As a result, you can provide a series of continually refreshed and unique communications to thousands of accounts at minimal extra costs.

### **Effective speed**

Marketing and other departments can have direct control over their communications instead of having to meet, scope, and review the layout and content with multiple groups. You can generate thousands of communications customized to individual customers with a single process. You can stop trying to restrain groups that want to go their own way, and can empower them instead to control and manage their communications.

Approvals happen before the customer is waiting. Consider the two examples given above. The sales person creates the proposal from content that has already gone through all necessary review and approval cycles *before* it is posted in the ECM system. The proposal is approved and ready to go to the customer the instant the sales person finishes it. The same is true for the call-center representative. He or she can only access pre-approved content when creating a customer letter. The result is a letter that can go to the customer immediately – without further reviews.

### **Simplification**

Complexity and proliferation become non-issues. The solution can have comprehensive enterprise-wide knowledge that works with pre-approved content — eliminating review cycles and many of the cross-functional engagements that arise in response to a specific sales situation. For forms, you have a few master templates. Customization to specific department-level requirements happens on the fly.

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## **Benefits of the HP Enterprise Document Automation solution**

### **Greater relevance through personalized communications**

Your communications reflect the knowledge that the customer (or potential customer) expects you to have. Relevant and accurate communications make the customer think you have that information at your fingertips — that you value that customer as an individual. That is a compelling sales tool.

### **Improved responsiveness through fast, interactive correspondence**

You can generate communications interactively from pre-approved content. As soon as you are done, the communication can go out the door. Customers and sales prospects get relevant and accurate communications immediately. Once again, you are saying that you value that customer. And that your company is a model of efficiency— a great organization to rely upon.

### **Consistency across your brands**

Your company presents a unified-brand image to the buying public — every communication uses a consistent set of fully approved marketing messages, templates, logos, and fonts. Yet, every department across the enterprise can directly control its specific communications by taking ownership for setting the business rules that control the process that generates those communications.

### **Reduced communication costs**

Cost savings result from many aspects of the HP Enterprise Document Automation solution. Forms management is simpler. Management reviewers can do their job at pre-scheduled intervals when they are in the office and not under time pressure. Sales people create proposals faster and with far fewer errors. You can initiate new marketing campaigns with a limited investment simply by modifying rules for business processes. It becomes cost-effective to communicate at a one-to-one level with thousands and tens of thousands of customers, instead of a few dozen large accounts.

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## **Benefits of an HP Output Management solution**

An HP Output Management solution can be a critical part of your HP Enterprise Document Automation solution, giving you the delivery reliability that you need. Yet, that is not the complete story about an HP Output Management solution. It is a robust software layer that provides an intelligent link for delivery of information and documents from enterprise applications to output devices, including print, fax, web, email, FTP, and file. It delivers output from applications running on data center, Windows, and legacy operating-system platforms to virtually any output device. Moreover, HP Output Management customers report a return on investment of 392 percent over three years.<sup>1</sup>

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<sup>1</sup> "HP Output Management: The value of guaranteed delivery," Alinean, April 2007

## Deliver output directly to the right destinations

A primary goal of an HP Output Management solution is to deliver enterprise output directly to the right destinations. That can be a shipping department at your plant in Indiana, a printer down the hall from your accounting team in a New York City skyscraper, a call center in India, and a supplier in Guangzhou. In short, it can – and should – deliver output to devices wherever your organization operates — in the data center, in offices, next to manufacturing lines, at shipping docks, and more.

## Simplify and optimize your output infrastructure

One of the strongest features of an HP Output Management solution is that it simplifies your output environment by providing a single solution, centrally administered and managed. Instead of an overlapping and redundant collection of output queues and device drivers— each with its own administrative and support team — everything is cleanly organized and located. Applications connect to one side of the layer, and output devices connect to the other. All necessary queues and drivers, schedulers, and tracking logs are contained within the HP Output Management ecosystem.

## Get your documents there every time on time

The HP Output Management solution provides assured delivery of critical business documents efficiently and securely in the least possible amount of time. Destinations are as mixed as today's technology offerings—faxes, print, emails, web, wireless devices—both inside and outside your enterprise.

## Handle output in virtually any language

An HP Output Management solution, with the HP International Printing for HP Output Server add-on software module, can accept, format, and successfully deliver data encoded with the Unicode™ Standard to virtually any output device in almost any location in the world. You can buy devices in any geography and move them anywhere without having to change hardware, software, or drivers.

## Enable single-step, fleet-wide upgrades

When upgrading output devices to handle almost any foreign language, you can update the entire output fleet connected to an HP Output Management solution in a single step. Simply add the HP International Printing for HP Output Server add-on module, and you are done. By providing the solution with the capability to handle any foreign language, you give the same capability to every output device that is connected to it.

## Manage your enterprise output fleet efficiently

Tools within the HP Output Management solution enable users and administrators to reduce costs, become more efficient, and accelerate processes. In addition, the system gathers real-time device-status information that accelerates problem identification and resolution. Users can check and manage their output requests. Administrators, operators, and support personnel can recover from problems remotely; reduce the time and effort required to perform common tasks; and collect information that you can use to optimize performance and lower costs. You can also integrate an HP Output Management solution to major enterprise system-management applications.

## Reduce costs

Establishing enterprise-wide management of your output devices can help you identify unnecessary overlaps in the number of devices, purchasing and inventorying of supplies, maintenance contracts, and more. Replacing collections of solutions such as print drivers with a single solution cuts the costs of managing them significantly. System-wide solutions also make it much easier and faster to troubleshoot and resolve problems. Users do not lose time trying to print their documents. And when there are problems, it is much faster to troubleshoot and resolve issues because you have more information and the tools to remotely do a detailed investigation of the problem.

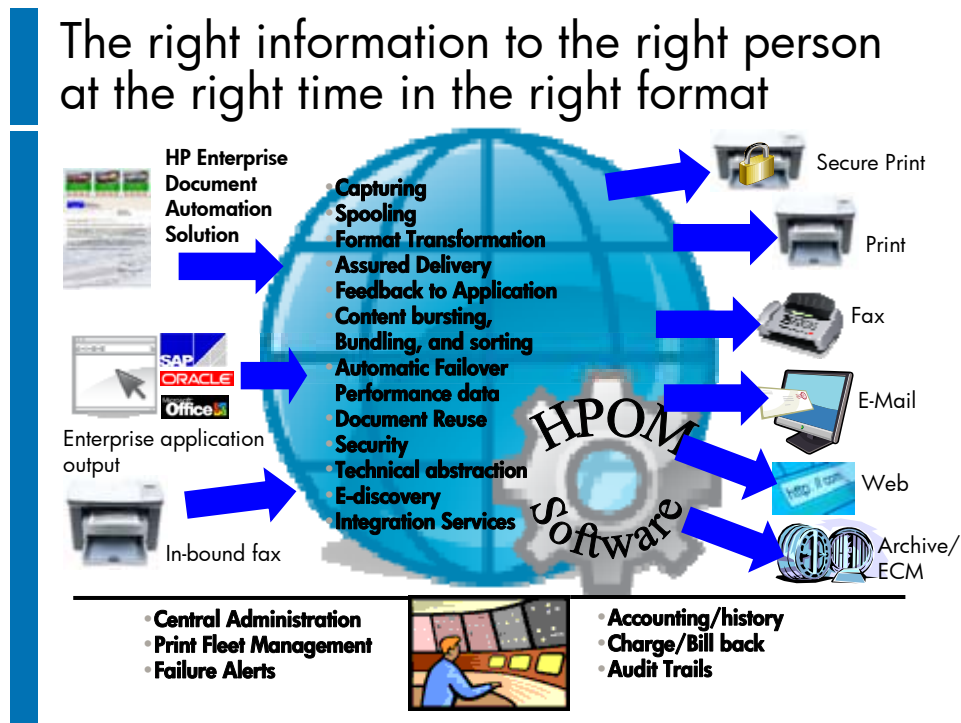
In the same 2007 study that Alinean, an independent third-party analyst, reported a 392 percent ROI for HP customers that have had an HP Output Management solution for at least three years<sup>2</sup>, they also reported these results:

- Reduced printer administrative staffing by 34 percent
- Reduced printer supplies by 18 percent
- Reduced printer service and support contracts by 10 percent

In 2006, InfoTrends<sup>3</sup> did a survey and found that an HP Output Management solution:

- Reduced the number of print servers by up to 20 percent
- Eliminated time spent on printing problems by knowledge workers by up to 25 percent
- Reduced time spent creating customized reports by up to 90 percent
- Cut time spent dealing with printer and print-related issues by up to 75 percent

Figure 1: How HP Output Management solutions work.



<sup>2</sup> "HP Output Management: The value of guaranteed delivery," Alinean, April 2007

<sup>3</sup> InfoTrends, May 15, 2006, study of ten customers with the HP Output Management solution installed

## Improve business performance through greater reliability and adaptability

An HP Output Management solution can dramatically improve reliability and sharply reduce the number of failure-to-deliver events across the enterprise. An HP Output Management solution improves your reliability in two ways by replacing:

- Inherently unreliable print processes with a process that tracks output to completion, supplemented by powerful notification and auto-react schemes
- Complex, difficult-to-manage environment of output processes with a single product that you can monitor and administer from a single, central point

The less complicated an environment, the easier it is to deploy new capabilities and applications. IT can respond to new business directions more quickly and with less risk.

## Increase user satisfaction and productivity across all enterprise applications

The solution provides what users want and expect from an output system: reliable delivery and ease of use. There are far fewer surprises. If the system says something printed, it is there when you look for it. If you need to send a document to three different printers, fax it, put it on the web, and save it in an archive, you use the same interface, reducing the possibility of errors, increasing productivity, and shortening training time.

## Simplify compliance with legal and environmental directives

An HP Output Management solution can automate the retention of such legally notable enterprise output as personnel records, invoices, and customs documents. You ensure greater consistency and completeness, plus you are ready to respond quickly and thoroughly to an e-Discovery request.

With more emphasis on environmental sustainability, many HP Output Management customers report up to a 50 percent reduction in printed output by using the HP Web Delivery add-on module. Much of the information that was delivered via hardcopy can now be consumed electronically.

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## Summary

Personalized communications means interacting with every one of your customers or sales prospects in a one-to-one fashion. Two of the greatest challenges are cost effectiveness and speed. While you can dedicate a sales team to large accounts, you cannot dedicate a team to every customer, nor can you invest the time and resources to create a unique communication from scratch for every customer.

The HP Enterprise Document Automation solution is a way to create and deliver personalized communications to thousands and tens-of-thousands of customers cost effectively and with excellent response time.

HP Output Management completes the HP Enterprise Document Automation solution by providing very high reliability for delivery to destinations throughout your organization. The HP Output Management solution is an intelligent layer that resides between enterprise applications and your output devices. It can connect virtually any application to virtually any output device and is not limited to use with the HP Enterprise Document Automation solution.

You can get a number of enterprise-wide benefits from an HP Output Management solution by using it to support the entire enterprise application environment. These benefits include very high reliability, simplification of the output infrastructure, high ROI, and reduced costs, as well as greater flexibility and adaptability.

## Appendix A: Examples of document automation

Document automation can apply to every corner of the business. Here are some examples:

<p><b>Financial services</b>            Investment statements            Online personalized financial plans            401(k) statements            Regulatory correspondence            Bank statement            General correspondence            Consolidated bank statements                Wealth management statements                Performance reports                Consolidated statements                Enrollment forms                1099s and tax reports                Mortgage documents                Prospectuses                Trust statements                Online banking services                Performance reports                Portfolio reports                Online presentment                Account applications                Brochures                Direct marketing</p> <p><b>Telecommunications</b>            Bundled service bills            Correspondence            Direct mail            Self-service account management            Web fulfillment</p> <p><b>Travel and hospitality</b>            Travel guides            Itineraries            Loyalty/Member programs            Direct mail</p>	<p><b>Government</b>            Personalized communications            Statements            Web fulfillment            Notices            Forms            Brochures            Correspondence            Legislative and regulatory updates            Program enrollment kits            Internal reports            Interactive documents</p> <p><b>Retail</b>            Customer loyalty documents            Credit card statements            Catalogs            Collateral fulfillment            Renewal notices            Promotions            Direct mail            Brochures            Coupons            Correspondence            Web fulfillment</p> <p><b>Utilities</b>            Residential bill            Correspondence            Self-service account management            Bundled service bills            Web fulfillment            Newsletters            Inserts            Disconnect notices            Collection letters            Interactive customer care correspondence            Regulatory correspondence</p>	<p><b>Service bureau</b>            Direct mail            Statements            Bills            Booklets            Personalized promotions            Correspondence            Newsletters            Complex financial statements            Portfolio documents            Policies            Catalogs            Coupons            Multi-chapter publications            Web fulfillment and self-service</p> <p><b>Insurance</b>            Policy            Welcome kits and ID cards            Pitch books            Annuity statements            Benefits booklets            401(k) statements            Applications            Quotes            Declarations pages            Bills            Notices            Endorsements            Renewals            Explanations of benefits            Agent reports            Claim reports            Commission statements            Installment schedules            Cancellation notices</p>
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## For more information

Please contact your HP sales representative or visit our websites listed below.

HP Enterprise Document Automation solutions: <http://www.exstream.com/>

HP Output Management solutions: <http://www.hp.com/go/outputmanagement>

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