



Communis targets transpromo with Exstream

The giant transactional and direct mailing printer is standardising its front end customer facing document generation services. *Simon Eccles reports.*

At the top end of personalisation are the systems that underpin the big direct mailing, transactional and growing transpromo operations. In the UK, such operations don't come much bigger than Communis, which turned over £290 million last year. It specialises in transactional and security printing for major financial services and banking clients such as Barclays, HBOS, HSBC, RBS and Nationwide, as well as direct mail. It also serves big commercial

operations such as Procter & Gamble, Tesco Direct and Centrica.

Back in April the group announced its decision to adopt the Exstream Dialogue software system as the basis of its planned move to offer transpromo print and related services.

During the decision making process HP acquired Exstream, completing the takeover in April this year. The fact that Communis had been buying HP Indigos already was coincidental to the decision to go for Exstream, says head of acquisitions David Monks.

'We did our due diligence to ensure that we chose the right product and the right partner to work with,' he explained. 'We started this before the HP acquisition. However that fits in well with us as we already had

HP Indigos within the group. HP says that our investment in Indigos is the fastest growing in the world. Last November we had none, and we now have four with more in the pipeline.'

The group already runs a variety of digital print systems, with a mix of inkjets including Kodak Versamarks and Scitex/Kodak overprinters, plus toner machines such as IBM/InfoPrint, Océ monochrome, spot and full colour printers and various Xerox DocuColor and iGen3 colour models. The Indigo printers offer higher quality. 'We see Indigo as the way forward for colour direct marketing,' Mr Monks explained.

Communis regards transpromo as an important emerging capability. He says, 'We recognise that we have to acquire new capabilities to move in our strategic direction of helping our customers communicate better with their customers, particularly in view of



Communis' £17 million transactional document factory at Speke, which opened last year.

the current economic climate. We have always been recognised as a leading printer, now we want to be seen as a technology and services provider. My job is to find these new capabilities through the acquisition of systems, such as HP Dialogue, or by acquiring companies that can extend our service offerings.'

Working with major clients means having customer facing front end technology that can communicate with enterprise level print ordering and specifying systems. Communisis already operated several document composition platforms, in particular PReS from PrintSoft for direct mail and Doc1 from Pitney Bowes' subsidiary Group1.

'We have also gained a number of composition systems that came with our outsourcing deals,' Mr Monks said. 'However, we looked at what the market needed for the next generation of channel communication capabilities, and wanted to standardise on a strategic platform, rather than having to support a lot of different software that all did more or less the same thing. We have to be agnostic to the range of channel outlets our customers want to use, so it doesn't matter if it is print, HTML, SMS or e-mail outputs.

'Some of our existing systems could be upgraded, but we decided to invest and start again. To help us make our choice, we also looked at what our customers were doing in this space. Doc1 was the established market leader, but we felt it was starting to be overtaken by Dialogue.'

Some 80% of the group's business is with financial services and customers have acquired multiple composition platforms. However, Mr Monks says that HP Exstream's Dialogue system was appearing on their approved lists the most often. 'It wasn't the cheapest solution, but we felt that Dialogue's capabilities were more closely aligned to what we were trying to achieve as a strategic direction,' he said.

'So for our core market Dialogue is becoming the system of choice. We want to get ahead of the curve in the UK and give our customers the choice about where the document design and changes happen in the end to end process. We also have our own capabilities that we can add alongside Dialogue, hence the partnership process was very important to our final choice.'

Online ordering

The system includes some elements of web to print ordering, so customers can set up documents within their own sites. It can also work with their own customers via the web, where

an online response triggers an e-mail and also generates a printed mail pack.

'Customers were not previously happy about outsourcing the composition process. Our solution and our approach lets them keep the appropriate levels of control without worrying about the execution process or the overall systems environment, which we can manage for them,' said Mr Monks.

'We are starting to favour a hybrid solution model, which is a mix of managed and outsourced. The customer doesn't have to invest in a whole Dialogue system, it might only need some of the components such as Dialogue Anywhere or Dialogue Live. It can leave Communisis to manage the rest such as development and production, and we help with control and management. It means we are not acting as a 'dumb' printer as we can add significant value to streamlining the design to delivery process, while the customer retains overall control and ownership.'

Moving to a single strategic platform is also helping internally, he says. 'We now have a common platform across all our developers, so all of our available resource is working with the same technology.'

This is already paying off, he added: 'We have seen 30% time improvements and it is not yet fully implemented. Within direct mail for example, a customer typically used to take up to 12 weeks to plan and implement a campaign. This is now down to four weeks, pre-Dialogue. By utilising Dialogue, we expect to get the execution cycle down to two weeks or less. We create the right environment for them and the customer just needs to access it. You can collaborate with enterprises more quickly to approve document designs and changes. So it is faster to implement.

Mr Monks points out that regulations for financial print aren't the same as for direct mail. 'FSA regulations and the like are very strict and our customers have to get this right or they could face significant fines. The challenge is to get speed and agility without risking non-compliance. What is important is having a full audit trail and visibility of who does what and what changes have been made –



David Monks.

we provide the governance and rigor to help our customers maintain their compliance. Dialogue absolutely delivers all that for us.'

Being heavily dependent on bank and financial services work in the worst crisis since time began would give any company pause for thought. However, Mr Monks believes that being able to offer closely targeted marketing collateral through a variety of interlinked media is a good response to inevitably changing customer requirements. 'The boom times are over and our customers will have to concentrate on communicating more relevantly and in a better way with their customers than they have traditionally been doing,' he said. 'So it could be good for the digital channel because of the dynamic personalisation.

'Carpet bombing mailings are coming to an end,' he predicts. 'What is needed is agile processes and targeted, relevant and timely marketing communications. Until now this has been too hard and expensive for our customers to achieve, but the day is now upon us and Communisis is responding to the opportunity and investing heavily in it.' ►



HP Exstream aims for enterprise

Still a relatively new name in the UK, HP Exstream is a fast growing player in enterprise level personalised document creation for targeted print and other media campaigns. It combines document creation, campaign management, tracking and multi-channel delivery.

Exstream was launched in 1998 as an independent company in Lexington, Kentucky. Sales have been healthy in the USA, where it is said to be the fastest growing in its class. It set up a UK office in 2005 and now has about 38 installations, including Communis, CDMS and Donnelley.

After the HP takeover early this year it became part of the company's IPG Enterprise Software group. The UK office has now moved into HP's headquarters near Bracknell in Berkshire. Initially it was renamed 'Exstream Software by HP'. That is a bit of a mouthful, so 'HP Exstream' is now officially sanctioned.

The acquisition gives Exstream a lot more credibility and probably an easier foot in the

door with huge corporations that like to deal with similarly large suppliers.

'HP is the sixth largest software company in the world,' pointed out Chris Stobbs, senior EMEA technical manager for the Exstream line. 'It also produces the Output Server, which it has sold since 1999 for secure document handling. It has also bought Tower Software, which specialises in records management. So we are getting together everything needed for the complete document life cycle: input, CRM, ERP, marketing, archiving.'

Despite the stress on high end applications, Mr Stobbs says that actually it is configurable to work with relatively small users too.

'With Exstream the effort taken to create something went down a lot,' said Mr Stobbs. 'The key is that a page can be built up from multiple templates by different people. We go upstream from the physical print process, to save costs and increase resources. We can take multiple and disparate data sources, merge them and out come personalised documents in a choice of formats for electronic media or print.'

'It is easy to set up variables and anyone can enter the data, such as sales and market-

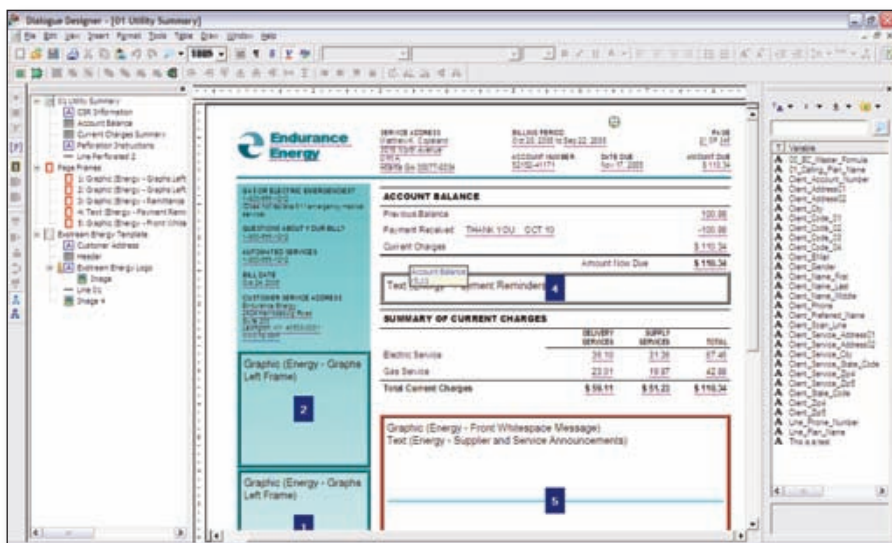
ing people. You don't need to be an IT or database specialist. The trick is controlling it and keeping it secure. You don't want people messing around with finances and bills.'

One of the attractions is the ability for a printer to add value, he says. 'A lot of print service providers will take, say, a stream of AFP documents from a bank and just print them,' he said. 'With Exstream they can add new services. It takes print companies beyond the print for pay stage to adding value for customers on all sorts of documents. Printers can actually build the documents, not just output supplied data. This also locks customers more into their print service providers.'

'We offer a packaged solution, so as well as providing the software we will go with the printer into the customer and work with them for a period of time to get it running. Typically the customer will already have a transactional system, for example an insurance quotation or telesales system that will generate PDF quotations following a sales enquiry. But the same system might also be used to generate personalised PowerPoint presentations for a sales person out on the road with a laptop.'

HP Indigo 7000: 'the way forward for colour direct marketing.'





Two screenshots showing document set-up. Below shows the definition of rules, while the screen above shows the definition of variable fields in a document.

Exstream products

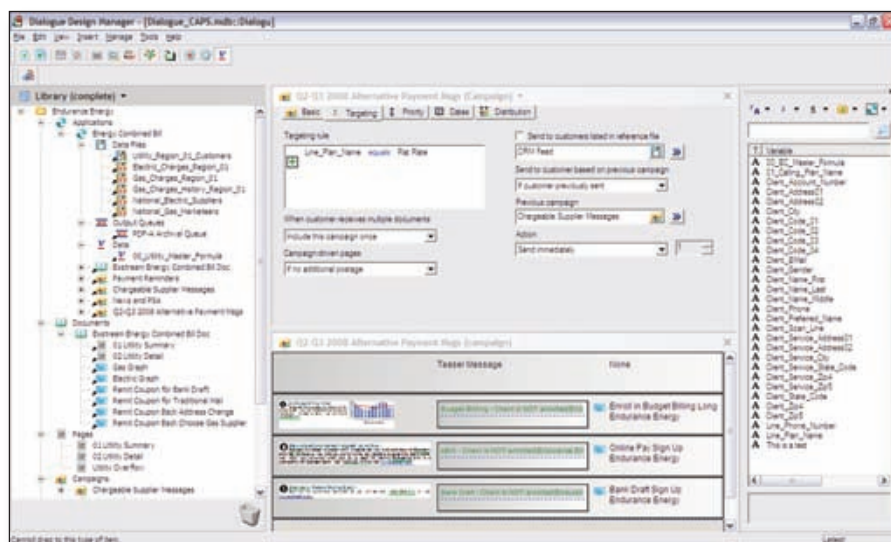
There are three main products Dialogue; Dialogue Live; and AFP Studio.

Dialogue is the central platform for building and deploying high volume, on-demand, and interactive document applications. It has open architecture and 'robust functionality' to connect with an enterprise's systems, data sources, and web infrastructure. It includes design and workflow features to produce fully personalised documents from complex statements to correspondence. These can be delivered through print or electronic channels.

Dialogue Live is a set of design tools that can be accessed at the customer end. Using Dialogue DLF Designer, the document developer can add editing controls and rules to the document to manage user interactions, making some areas of the document editable, while locking others. The developer can include logic to access external data sources for pre-filling areas of the Live document based on what is input, authenticating user rights and content, executing decision making logic, and triggering other processes.

Live document developers can also add interactive features to existing Dialogue document applications, so any Dialogue created document can be turned into a Live document.

The design side includes Dialogue Anywhere for Marketing, a Windows and browser based tool set to allow marketing users to add rules-based content to document templates. This includes Dialogue Exchange Format, which can convert QuarkXPress layouts into variable data Dialogue files, and back again.



A notable feature is that different types of user can work on separate elements within the same documents or campaigns. For instance the legal department may write the disclaimers, while the marketing department creates the sales message.

Automated content control processes can send e-mail notifications to different business groups when objects are ready for approval. Compliance support allows content to be managed by dates and jurisdictions so administrators can ensure that correct and legal content is automatically included in documents.

Multiple data sources for the variable elements can be accessed, such as columnar, delimited, XML, ODBC, and COBOL copybooks. The Dynamic Data Access (DDA) module and connectors can read/write to application systems like CRM, ERP and other enter-

prise systems for real time processing.

After a document application has been designed, it can be packaged and previewed with fully composed test output. When the application is ready to go, the Dialogue engine processes it with live data. There are 16 print and electronic output formats, plus Web/XML composed, data, and content output.

Dialogue Real-time is an on-demand document generator that integrates with a user's existing message layer and custom built system to produce fully personalised documents. It works by 'listening' to the message layer for system requests that are generated by users or triggered by pre-defined system rules. When a request is detected, Dialogue 'wakes up' and composes the requested document on demand using either data provided or taken from defined locations.

AFP Studio is a set of modules designed for print workflows that use AFP (Advanced Function Presentation), the IBM invented document language that is now an ISO standard in the hands of the multi-vendor AFP Consortium. It is widely used for enterprise level and financial print. ■

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