

HP Exstream Professional Services

Transition Plan Workshop

Develop a plan for an effective HP Exstream implementation

Create the **roadmap** to move from your current state to **your future state** with HP Exstream



The Transition Plan Workshop is an HP Exstream Professional Services offering designed to capture the current state of your document creation and delivery processes, detail how HP Exstream can improve your processes, and show you how to get there. With years of experience, HP can create a roadmap to a successful HP Exstream implementation. HP helps you prepare for new regulatory requirements and identify business initiatives, such as reduce time to market, improve call center efficiency, and enhance marketing and sales opportunities.

The Transition Plan Workshop requires a minimal investment of your time. After a session of information gathering that usually lasts two to three days, HP analyzes the gathered data and then presents the information you need to understand how HP Exstream can be implemented for your business, and the steps it will take to get there. With HP's business process and technical expertise and your knowledge of your document processes, we can guide you to the document automation solution that's right for your business.

What is the Transition Plan Workshop?

The Transition Plan Workshop is a thorough evaluation of the entire lifecycle of your document composition and delivery processes. It is comprised of three phases, as shown below:

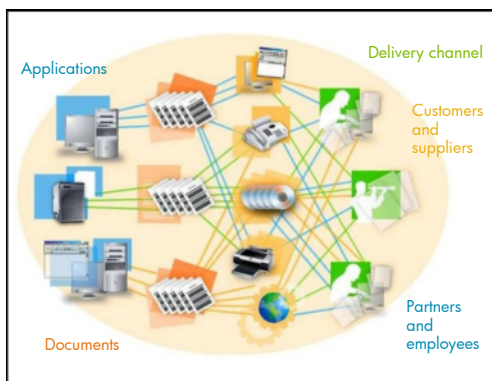
- **Phase 1—Onsite document review workshop:** HP meets with your experts to define the current state of the creation and delivery of your critical customer communications. We work with you to define your strategic objectives—what you hope to achieve with an HP Exstream implementation, as well as what resources you are able to commit to the implementation. Our goal is to understand your initiatives and where they intersect with your document-centric processes in order to create a current state, or *as-is*, process map of your document application processes.
- **Phase 2—Analysis:** The information gathered in Phase 1 is compiled and analyzed by HP. We define the challenges and opportunities and detail your system components—how they interact and the impact of an HP Exstream implementation. We then create a future state process map with HP Exstream and draw up a solution design proposal.
- **Phase 3—Onsite sponsor debrief:** We deliver an executive presentation that details your current state—where you are now—and your future state with HP Exstream—where you could be. HP presents the future state process map and reviews the proposed HP Exstream implementation at a high level, and how the solution meets your stated criteria for success.

Technology for better business outcomes

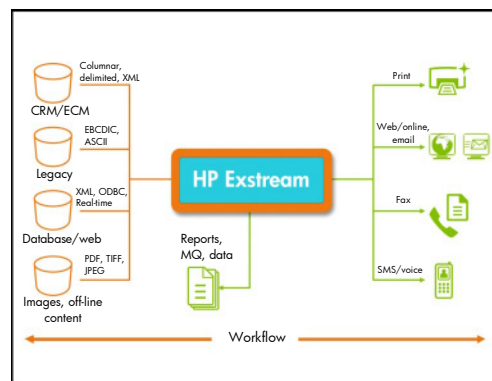
www.hpexstream.com



The Transition Work Plan helps you get from your current state...



to your future state with HP Exstream



What are the results?

- A roadmap guides the customer from the current state to the future state with HP Exstream
- Integration requirements are assessed, using HP's formal methodology
- The assurance that comes with a complete understanding of how your current processes, tools, and systems will interact with HP Exstream
- Current issues, pain points, or challenges are prioritized, and opportunities for improvement or cost savings with HP Exstream are defined
- Risks are minimized and the time to implement HP Exstream is reduced by providing insight into the infrastructure changes and the level of resource investment prior to the start of the project
- A formal planning session occurs to identify key aspects of integrating and implementing HP Exstream

What are the benefits?

The Transition Plan Workshop helps you understand your current document creation and delivery processes and plan for an HP Exstream implementation. The workshop provides:

- Roadmap that defines path to future state.
- Clearer picture of future state workflow processes and production processes
- Overview of organizational and architectural benefits and changes with HP Exstream
- Understanding of the impact of data or design changes
- Defined measurable goals, milestones, and results of transition
- Prioritized improvements for maximum ROI
- Defined scope of upcoming projects
- New channels or market opportunities identified
- Business case validated

Who should participate?

Document-centric processes typically affect a wide and varied group of stakeholders within an enterprise. We recommend that you invite members from across your organization that can provide a complete view of the existing process, and have a stake in improving results. This group will participate in working sessions to provide information about the current process and in a half-day session to review the Transition Plan results.

What materials are delivered?

Transition Plan Findings Document

- Executive Summary
- Key Benefits
- Current State Baseline
- Critical Business Issues Defined
- Future State Process
- Document Process Gap Analysis
- Solution Recommendations / Roadmap
- Assumptions and Risks

Executive Presentation

- Discovery, Analysis, and Results Findings
- Recommendations and Benefits

HP—a trusted partner

HP Exstream has been a leading document automation solution for over 10 years. Our Professional Services teams have developed hundreds of successful projects and applications and enabled organizations to handle the most complex statements and staggering volumes of correspondence.

Get started

To schedule a Transition Plan Workshop, contact your account manager or call 866.318.5925. For more information about HP Exstream, please visit www.hpexstream.com, or contact us at exstream.info@hp.com.

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Effective communications. Multiple channels. **One solution.**

