

# DIGITALLY TRANSFORMING THROUGH INTELLIGENT DOCUMENT AUTOMATION:

SMB Customer Success Playbook



# Introduction

Since the beginning of the pandemic, organizations on a global level have pulled their forward investments in technology and the digitalization of work processes, making it one of their top business priorities<sup>1</sup>. Many small to medium-size businesses (SMBs) who relied on purely paper-based document processes found themselves in a precarious position trying to navigate a new way of working. Single-channel communications were no longer enough or not feasible if an employee was at home without access to office equipment.

At this point, it is evident that things are not likely to revert back to pre-pandemic normalcy any time soon. On a positive note, it has encouraged SMBs to take a closer look at how they manage customer communications. By utilizing digital tools like document automation software, SMBs have been able to accelerate their digital evolution and optimize their workflow. Modernizing their operations and internal processes has not only enabled multi-channel document delivery but helped businesses drive operational efficiency and deliver a better customer experience.

In this e-book, we illustrate how several Quadient customers took action and tackled key business challenges with the help of Quadient Impress.

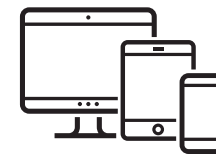


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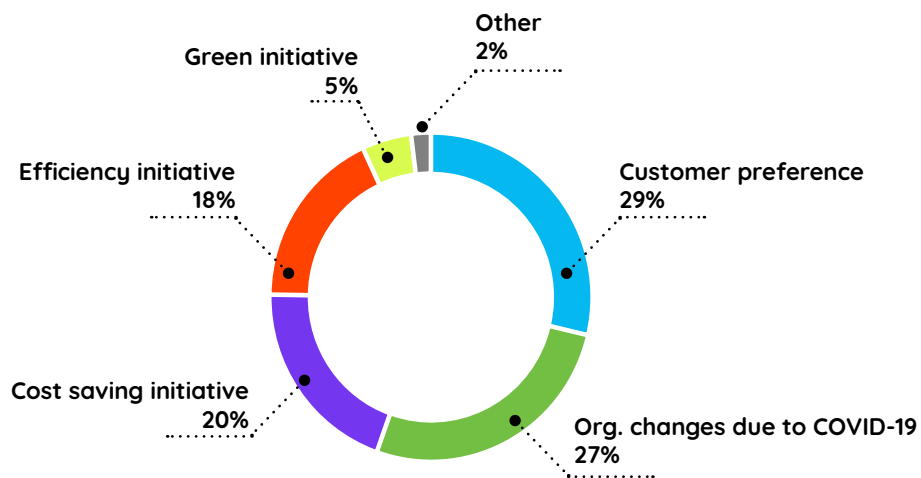
# Key factors driving the trend toward digital communications



Digitally transforming outbound documents has accelerated as a result of both pre-existing trends and the pandemic's effect on the economy, customer behaviors, and business operations. In a recent study conducted by Keypoint Intelligence, covering businesses in the US and Western Europe, 58% of respondents stated that they have changed how they send customer communications due to external factors.<sup>2</sup>

Customer preference took the number one spot. The customers of today expect better technology, personalization, and more ways to communicate. "Historically, customers have expected basics like quality service and fair pricing — but modern customers have much higher expectations, such as proactive service, personalized interactions, and connected experiences across digital channels."<sup>3</sup>

## Primary factors driving your company's trend line toward digital communications



Source: Keypoint Intelligence Drivers of Change in Customer Communications, November 2021



Coming in a close second was organizational changes due to COVID-19 which in turn heightened the pressure for lower costs and efficiency. Remote and hybrid work situations created new requirements for businesses to maintain seamless customer communications.

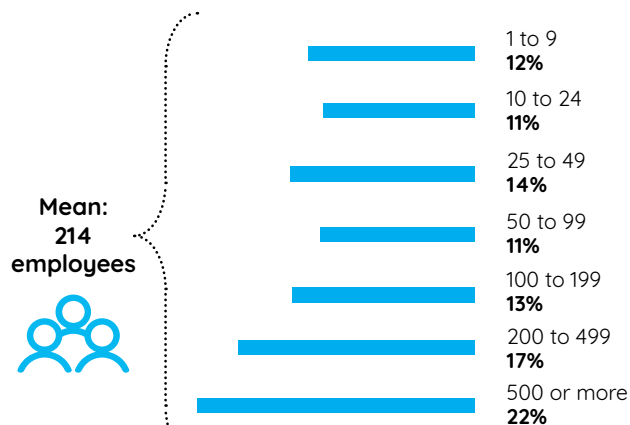
As stated earlier, the pandemic forced many SMBs to reevaluate how they communicate with customers from a sheer feasibility standpoint. Many businesses initiated short-term solutions that were essentially band-aids but over time these short-term solutions, like having administrative staff rotate in and out of the office, were not sustainable for the long term.

# Customer profiles:

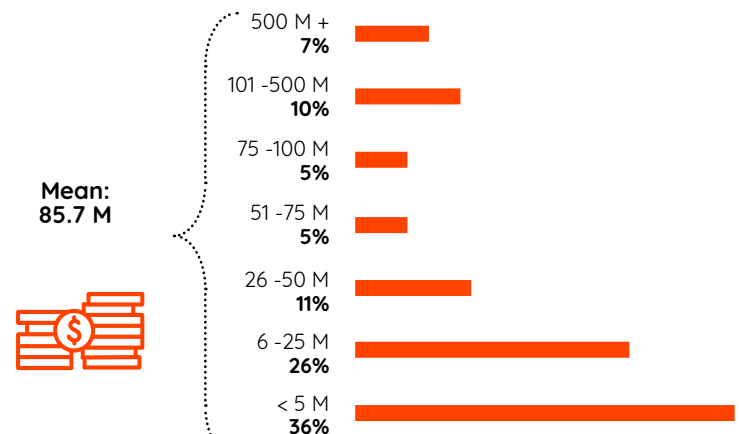


Quadient also launched a survey through TechValidate to correlate what factors drove their customers' digital transformation journey. Participants of both studies mirrored each other closely sharing many of the same characteristics. Below represents a composite of the customers who participated in the Keypoint Intelligence research as well as those who participated in the TechValidate survey.

## How many employees work at your company?



## What is your company's annual sales/turnover? (Millions)

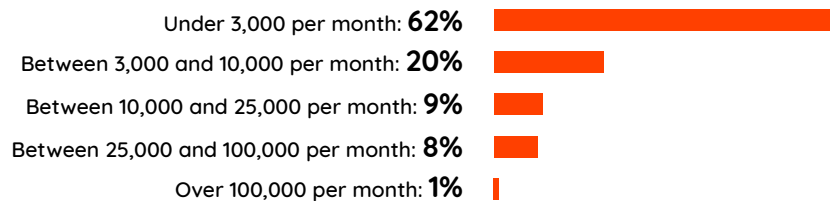


Source: Keypoint Intelligence Drivers of Change in Customer Communications, November 2021

Customers work in a wide variety of industries with the highest concentration in **healthcare, government, financial services, and education**



Approximately how many customer communications do you send each month (envelopes or digital communications)?

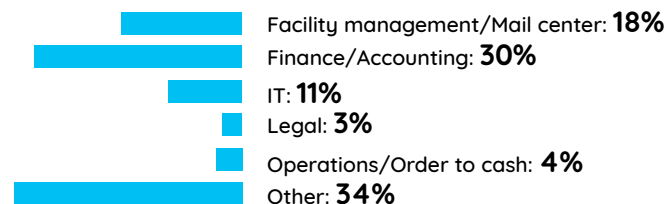


Source: TechValidate survey of 99 users of Quadient, August 2021

Over **80%** of respondents say they send **up to 10,000** communications per month with **60%** percent of those sending **less than 3,000** per month



What department do you work in at your organization?



Source: TechValidate survey of 120 users of Quadient, August 2021

**More than one-third of customers** surveyed listed “Other” as their department, reinforcing that they wear many different hats and are **responsible for multiple function areas**

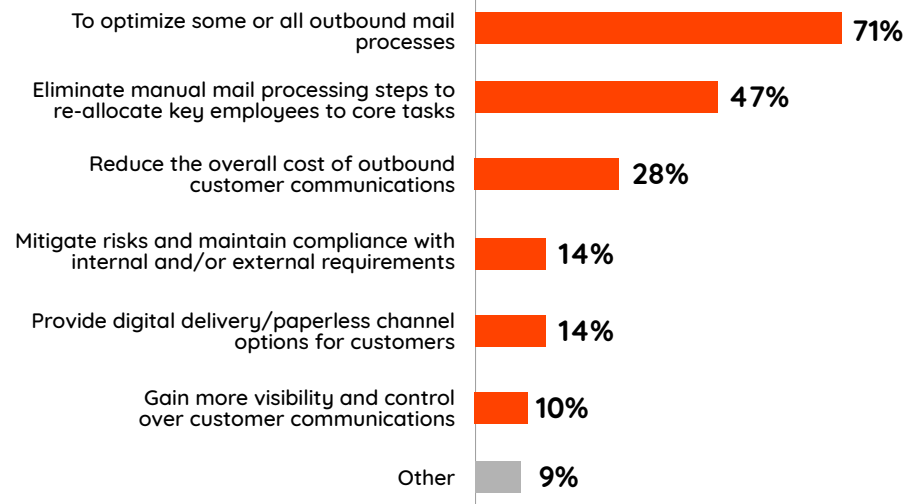
# Main drivers for purchasing a document automation solution



When asked 'what were the main drivers in seeking out a document automation solution', overwhelming customer response was to **help optimize their mail processes**. While participants were able to choose more than one answer, all customers were **able to achieve several objectives by implementing an intelligent document automation solution**.



## What were your main drivers for purchasing a document automation solution such as Quadient Impress?



Source: TechValidate survey of 116 users of Quadient



The following is a sample of customers from the TechValidate survey who offered to provide named testimonials as a part of their participation. Each mini case study outlines their top priority for implementing a solution. We focus specifically on how they addressed a key challenge and how **Quadient Impress** has enhanced their business and optimized their process.



# Use Case: ELIMINATE MANUAL DOCUMENT PROCESSES

CUSTOMER:

**Joe Aguilos,**

Student Housing Coordinator

COMPANY:

**Rose Hill Asset Management Corporation DBA RHAMCO**

VERTICAL:

**Property Management**

## Company snapshot:

RHAMCO owns, operates, and develops an extensive portfolio of over 1000 units in the Manhattan, Brooklyn, and Bronx area. The firm offers a complete menu of services that run the gamut, from project and building management and tenant representation; to administrative financial, legal, and marketing support.

## Situation:

As a result of NY State law being passed, Rose Hill was faced with a new legal requirement to provide more frequent communications to its tenants. The law states, “if rent is not received within five days and 14 days’ notice of the date specified in the lease to receive payment, landlords are required to send a notice via certified mail to the tenant demanding payment.” The law also stated that “failure to send such notice may be used as an affirmative defense in a nonpayment summary proceeding.” As its customer communications were processed manually this would create a substantial increase in employee labor hours.

As many employees were also working remotely, this would make more frequent, in-house mailings exceptionally challenging. Due to COVID restrictions, they were especially concerned about the risk of exposure by having to come into the office to do mailings and going to the post office.





## Solution:

Rose Hill implemented Quadient's outsourced mailing solution, Impress Distribute. By utilizing Impress Distribute, Rose Hill was able to offset the increase in manual processing tasks by having the process managed at a secure offsite mailing facility, reducing their mail prep to just a few clicks. All employees have to do now is upload customer communications to Quadient's cloud-based platform, and Quadient's secure fulfillment center handles the rest.

Adding Impress Distribute into their workflow not only cut down processing time from hours to a few minutes but also provided tracking and auditing capabilities not possible with paper-based manual processes.

Impress has made handling regular day-to-day mail much easier and is also being utilized to send certified mail to tenants. By adding Impress, Rose Hill has more efficient outbound mail processes and has been able to reallocate key employees to core tasks.

### QUADIENT CUSTOMER TESTIMONIAL



I am now able to send out statements to all of our tenants in 5 to 10 mins tops.

— Joe Aguilos, Student Housing Coordinator, Rose Hill Asset Management Corporation

Source: **Joe Aguilos, Student Housing Coordinator, Rose Hill Asset Management Corporation**



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## Business impact:

- Reduced time spent processing mail by **> 75%**
- Increased cost savings **> 75%**
- Ability to focus employees on higher-value tasks
- Kept communications flowing despite COVID restrictions





# Use Case: ENSURE PATIENT PRIVACY/ REGULATORY COMPLIANCE

**CUSTOMER:**  
**Kelly Reynolds,**  
UM Compliance Manager

**COMPANY:**  
**Southwestern Health  
Resources**

**VERTICAL:**  
**Health care**

## Company snapshot:

Southwestern Health Resources is an accountable care organization (ACO) in which a group of doctors, hospitals, and other health care providers come together voluntarily to give coordinated high-quality care to their Medicare patients. The goal of coordinated care is to ensure that patients get the right care at the right time while avoiding unnecessary duplication of services and preventing medical errors.

## Situation:

Southwestern sends several hundred variable patient approval/denial letters daily that were being processed in-house. Their document process was manual and very labor-intensive requiring multiple page documents that varied by patient. As patient privacy is of the utmost priority, their process included manual audits to ensure compliance.

When the COVID pandemic created a work-from-home environment, Southwestern required a daily rotation of essential personnel to come into the office to complete tasks.

As the company was growing with more locations and expanding business units, Southwestern needed to optimize its document workflow to prepare for future processing requirements.



QUADIENT CUSTOMER TESTIMONIAL



We gain security, knowing that our Medicare regulated mail times are being met by a company that has an outstanding business continuity plan.

— Kelly Reynolds, UM Compliance Manager, Southwestern Health Resources

Source: **Kelly Reynolds, UM Compliance Manager, Southwestern Health Resources**



Validated Published: Nov. 9, 2021



### Solution:

Southwestern took advantage of the entire Quadient Impress platform giving them the flexibility to send mail through multiple delivery channels (physical or digital) as well as allowing employees to manage mailings from anywhere.

Impress Automate enhanced their in-house mailing equipment with intelligent bar code technology that not only decreases production time but ensures the right documents go into the right envelope.

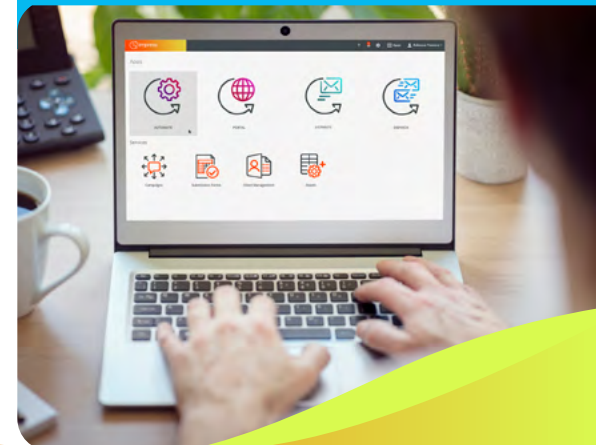
Southwestern implemented additional cloud-based Impress applications that enabled employees to prepare, and upload mailings from home, so there was no longer a need for personnel to rotate in and out of the office to complete mailings. Patient communications could either be consolidated from different locations and centralized to their mailroom or sent to Quadient's secure outsourced mailing facility for processing. Quadient Impress meets strict security standards and offers the highest level of HIPAA Compliance and ensures no PHI is breached.

By modernizing its document management process, Southwestern Health has reduced mail costs, sends communications more quickly and efficiently, and is better equipped for future growth.



### Business impact:

- increased customer satisfaction: **> 75%**
- improved speed of document delivery: **> 75%**
- reduced time spent processing mail: **> 75%**
- increased cost savings: **> 75%**





# Use Case: SHIFT TO DIGITAL DOCUMENT DELIVERY

CUSTOMER:  
**Mercedes Moreno**  
Financial Analyst

Company:  
**Twisted X**

Vertical:  
**Consumer goods  
manufacturer**

## Company snapshot:

Twisted X® manufactures boots and shoes in an extensive range of styles for the lifestyle, outdoor, and work. Twisted X prides itself on using sustainable methods and eco-friendly materials while honoring its western roots and heritage.

## Situation:

Twisted X had been a Quadient customer for 5 years. They wanted to move to digital invoices and statements that were currently being sent and managed manually. They were unable to send electronic communications through their ERP and, due to COVID, most employees were working remotely.

They needed a tool that could handle multi-page documents and invoices while providing robust reporting and visibility.





## Solution:

Twisted X implemented Impress Distribute. Invoices and statements could now be managed from virtually anywhere via an intuitive cloud-based platform. Documents could be customized with targeted messaging to deliver a more personalized customer experience as well as templates could also be created to reduce future processing time. Users just needed to upload documents for the Quadient's outsourced facility to handle the rest. By migrating to digital delivery Twisted X has reduced the overall cost of outbound customer communications in terms of labor and physical inventory and while speeding up the invoice cycle.

## Additional business impact:

- increased customer satisfaction: **> 75%**
- reduced time spent processing mail: **> 75%**
- increased cost savings: **> 75%**

Mercedes stated that the solution is “very easy to use and a huge timesaver.” Twisted X rated the implementation of Quadient Impress as having a ‘high impact’ in the following areas:

- ability to focus employees on higher-value tasks
- enhanced corporate image by creating best-in-class communications
- improved look and feel of outbound communications
- reporting and compliance on outbound communications
- employee job satisfaction



# Use case: SUPPORT A REMOTE WORK ENVIRONMENT

CUSTOMER:

**Rachel Bruce**

Denial & Underpayment Specialist

COMPANY:

**Accelerated Claims, Inc.**

VERTICAL:

**Insurance**

## Company snapshot:

Accelerated Claims, Inc. provides hospitals with reimbursement expertise for complex claims. ACI's complex claims management focuses on motor vehicle and workplace accident claims of patients who present in a hospital's Emergency Department. ACI has been named in the Inc. 5000 list of fastest-growing companies in the country.

## Situation:

Standard business procedures were interrupted by COVID. Because employees were largely working from home, the distribution of physical mail communications became more of a challenge. As there was no system in place to manage mailings remotely, employees had come into the office to do large mailings. Manual labor required to compile, assemble and fold/insert multi-page documents with attachments was significant and time-consuming as different states have different requirements for the types of files that must be included in a claim packet.

Accelerated Claims was looking for a way to reduce costs by managing mailings outside of the office that would still provide the highest level of security to mitigate risks and maintain compliance with internal and external requirements. With the future direction of the company leaning towards an all-remote workforce, they required a solution that allowed for automated production of remote mailings.



## Solution:

Accelerated Claims leveraged two Quadient Impress applications: Automate and Distribute that easily integrated into their ERP system. A web-based dashboard allows users to upload and send jobs remotely, digitally transfer files to recipients via a secure portal, or send SMS messages. Repetitive jobs, as well as on-off jobs, could be automated with a print driver or drag and drop folder function which allowed for hands-off, simplified submission into the physical postal mail stream.

Once the documents are extracted from their ERP files, they are submitted through Impress Automate which classifies the document based on data trigger. Once a document is identified, specific business rules are applied to dictate how the document should be handled, built, and routed through the systems. Finalized files are automatically routed to Distribute for production at a secure, outsourced mailing facility.

Quadient Impress made the service of sending bills easy and less time-consuming while ensuring customer privacy and regulatory compliance.

### QUADIENT CUSTOMER TESTIMONIAL



This service has allowed those employees working remotely to bill out accordingly. It has improved the turnaround time for bills to be resolved as well.

— Rachel Bruce, Denial & Underpayment Specialist, accelclaims

Source: **Rachel Bruce, Denial & Underpayment Specialist, accelclaims**



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by SurveyMonkey

## Business impact:

- ability to focus employees on higher-value tasks: **high impact**
- reporting and compliance on outbound communications: **high impact**
- efficiency and job satisfaction of your employees: **high impact**
- reduced time spent processing mail: **> 75%**



# Use case: OPTIMIZE EMPLOYEE AND OPERATIONAL EFFICIENCY

CUSTOMER:

**Charles Nersinger**

Director of Supply Chain & Logistics

COMPANY:

**EF Education First**

VERTICAL:

**Professional Services**

## Company snapshot:

EF Education First is an international education company that specializes in language training, educational travel, academic degree programs, and cultural exchange.

## Situation:

Charles Nersinger of Education First, a current Quadient customer, was looking to improve mail workflow by reducing manual labor and eliminating inventory costs across departments. Their current fulfillment process required manually applying Avery labels for outgoing addresses. His goal was to repurpose labor for more important business-related tasks and save on the cost of materials.

### QUADIENT CUSTOMER TESTIMONIAL



Cleaner and more standard look/feel of outbound mail.

— Charles Nersinger, Director of Supply Chain & Logistics, EF Education First

Source: **Charles Nersinger, Director of Supply Chain & Logistics, EF Education First**

✓ Validated Published: Nov. 9, 2021

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## QUADIENT CUSTOMER TESTIMONIAL



We have been able to allocate staff hours to higher-value initiatives. In turn we have been able to elevate staff to higher pay-grades or new roles within the company.

— Charles Nersinger, Director of Supply Chain & Logistics,  
EF Education First

Source: **Charles Nersinger, Director of Supply Chain & Logistics,**  
**EF Education First**



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## Business impact:

- Reduced mail processing time :  
**> 75%**
- Increased the speed of document delivery : **> 75%**
- Increased customer satisfaction:  
**> 75%**

## Solution:

Quadient's Account Executive recommended an upgrade to their mailing hardware and the addition of document automation software (Quadient Impress) to help Charles achieve his objectives. Impress could be implemented quickly and easily to enhance document impact and integrity while avoiding disruption to their business.

As a result, Education First streamlined and standardized their outgoing mailing process and improved the professional look and feel of their customer communications. By eliminating the peel and stick process when applying labels Education First is saving time, labor, and materials costs. The customer stated that he was "super impressed with Quadient's follow up and customer service and his rep's ability to come up with different solutions to meet the needs of the company" as well as Quadient's professional services support after go-live.



## How to get started:

As we move through 2022, there remains at least one area where SMBs can exert control, and that is customer communication management. How you manage your document workflow process and how your business interacts with customers is in your hands, and a cloud-based solution puts it right at your fingertips.

Automation is essential for long-term customer retention and increased cross- and up-selling opportunities. In this highly competitive and unforgiving environment, “customer retention is the new growth.”<sup>4</sup> Organizations must recognize the pace of change is accelerating and failure to keep pace comes with substantial risk. Recognize your competitors are quickly reacting to these changes as well.

Start by asking yourself four core questions:

1. Do your current capabilities match today’s needs?
2. Are there duplicate procedures, bottlenecks, or processes that could be improved?
3. Are there existing processes that could be automated?
4. Could my employees be better utilized on higher-value tasks?



Quadient Impress is a multi-channel document delivery platform with flexible plug-in applications that can be customized to fit your current business needs and adapted as your company grows and evolves. Quadient Impress offers a sophisticated yet user-friendly solution to help you enhance productivity while saving you time and money. Set your business on a path of a digitally transformed future state. Read more customer success stories on [Quadient.com](https://www.quadient.com) or contact us to learn more.

## Sources:

1. World Economic Forum - Future of Jobs Report, September 2020
2. Keypoint Intelligence Drivers of Change in Customer Communications, November 2021
3. <https://www.salesforce.com/resources/articles/customer-expectations/>
4. PEX Network Trends Report 2022, December 2021
5. TechValidate BPA-IDA Survey, August 2021

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## About Quadient®

Quadient is the driving force behind the world's most meaningful customer experiences. By focusing on Intelligent Communication Automation, Parcel Locker Solutions and Mail-Related Solutions, Quadient helps hundreds of thousands of customers worldwide simplify the connection between people and what matters. For more information about Quadient, visit [quadient.com](https://www.quadient.com).