the document institute

Educating ■ Consulting ■ Transforming

www.**document**institute.com

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Personalised Customer Communication Management (CCM)
the document lifecycle
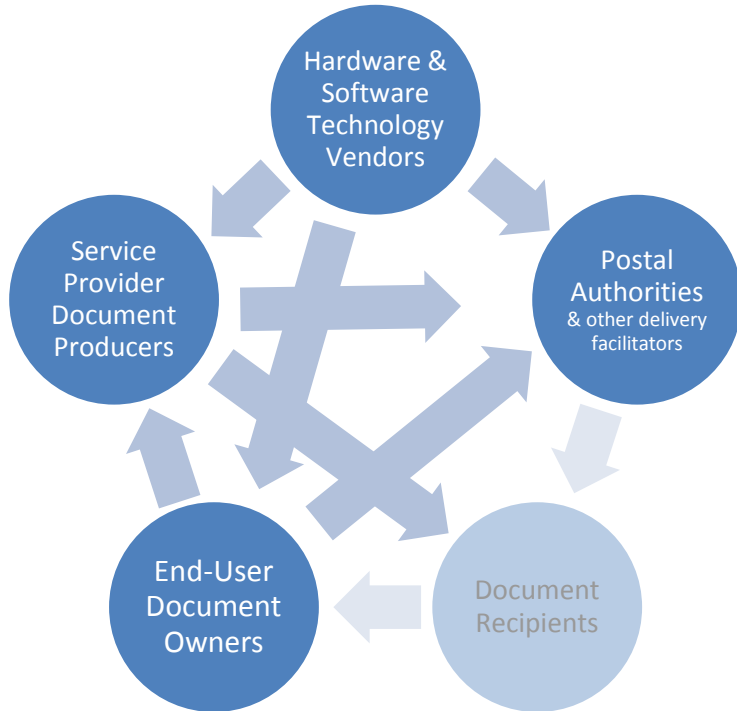
- **End-User Document Owners**
  - Regularly generating 1000's of documents
    - Bank, Insurance, Finance, Utilities, Telecoms, Retail...
- **Service Provider Document Producers**
  - Providing the service to the generators
    - Print/Mail Bureaux
    - Printers looking to add variable documents
- **Hardware & Software Technology Vendors**
  - Develops or sells software to manage or create documents
  - Manufacturers or sells hardware to create (print) or insert (for mail) documents
- **Postal Authorities & other Delivery Facilitators**
  - eg. physical mail, plus email, digital mailbox, other online

Consulting

- **Performance Audit**
  - Level of Awareness across the Document Production Workflow
- **Output Advisory Services**
  - Software & Hardware Technology
  - Service Providers
- **Strategic Consulting**
  - Strategic business projects & planning
- **Information & Knowledge Management**
- **Effective Data Analysis & Usage**
- **Industry Research & Think Tank**
- **Logistics & Mail**
  - Creation and delivery of documents
- **Hybrid Mail**
  - Keeping documents electronic closer to the point of destination
    - Document aggregation
    - Cross country, cross border

Educating

Document Systems Industry Education

- Technical
    - Printing Systems
    - Page Description Languages
    - Production Environments
    - Electronic Document Delivery Technologies
    - Reporting & Process Integration
    - Typography
    - Machine Readable Symbologies
        - Barcodes, QR code, OMR, MICR, OCR...
    - Data and Character sets
        - Single-byte, Double-byte, Unicode...

- Business
    - Document Systems Industry
    - Document Producers
    - Other Service Providers
    - Business Process
    - Around the Document Creation Process
    - Industry Overview & Trends
    - Expanding Services Beyond Print
    - Hybrid Mail
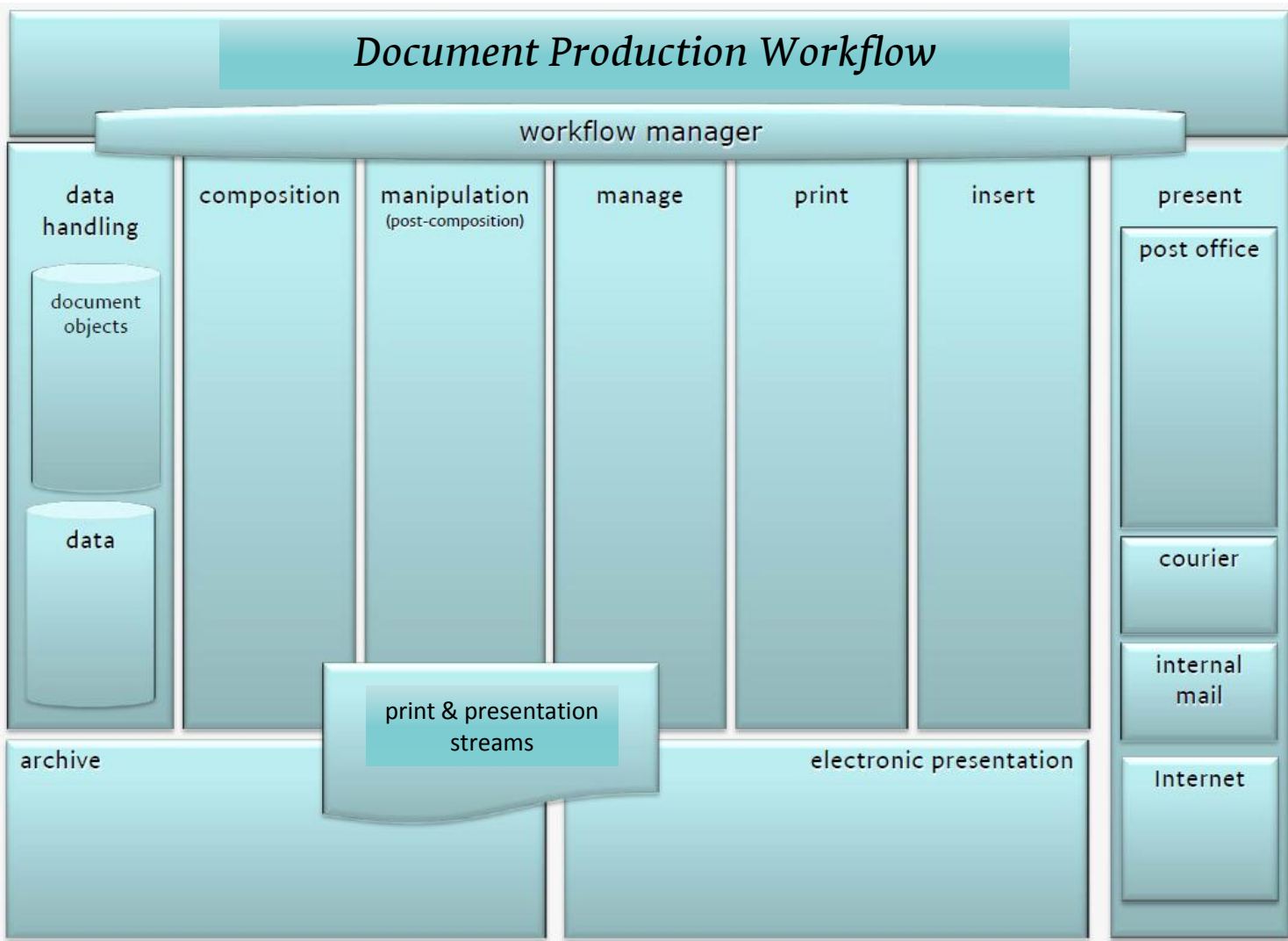   - Industry Terms, Acronyms, and Jargon

Educating

- **Document Specialist School**

  - **Xplor International** endorsed towards:

    - Electronic Document Associate (EDA)

    - Electronic DocumentProfessional (EDP)

  - The school includes three courses, typically delivered across 5 days

    1. **Document Production Workflow**

    2. **Document Systems Lifecycle**

    3. **Document Production Best Practices**

acadami
Education and Accreditation for
Transaction Document Professionals
www.acadami.org

Document Production Workflow

the **micro** timeline

2 days
(including assessment)

the **document institute**

Document Production Workflow

workflow manager

data handling — composition — manipulation (post-composition) — manage — print — insert — present

document objects

data

print & presentation streams

archive — electronic presentation

post office

courier

internal mail

Internet

Document Systems Lifecycle

the **macro** timeline

2 days
(including assessment)

Document Systems Lifecycle — the macro timeline

- needs analysis
- business analysis / technical analysis
- architecture (approval)
- specifications
- develop
- QA & Test
- launch
- maintain
- improve
- decommission

Sales cycle

Software Development Lifecycle

Lean Production Process

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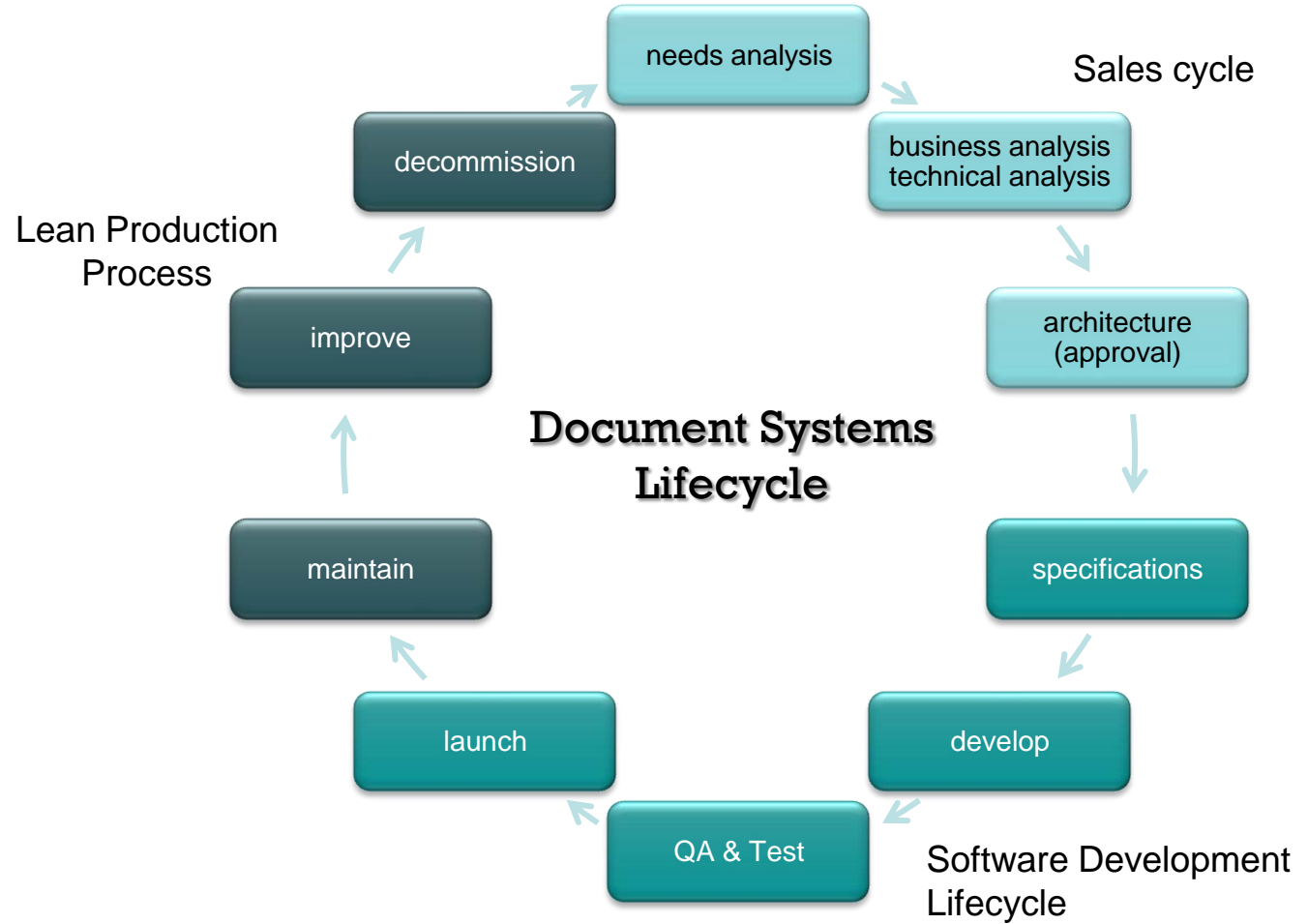
Document Production Best Practices

- *1 day (including assessment)*
- Review of production workflow and systems lifecycle
- What technologies and practices are
  - **Best** *where we should aim*
  - **Acceptable** *things that we can continue to use even though there is better*
  - **Poor** *legacy technologies and practices that should be decommissioned when possible*

Educating – Why?

- **Risk mitigation**
  - Much more likely to spot Service Level Agreement and Privacy risks
  - Remove communication problems to other functions
- **Productivity improvement**
  - Scope of Work and Change Requests take less time to finalise
  - Fewer undetected "misunderstandings"
  - Increased productivity
  - Greater utilisation of resources
- **Motivation**
  - Better overall knowledge = higher comfort-level at work
  - Better vocabulary makes it easier to communicate
  - High performers recognise the company's investment
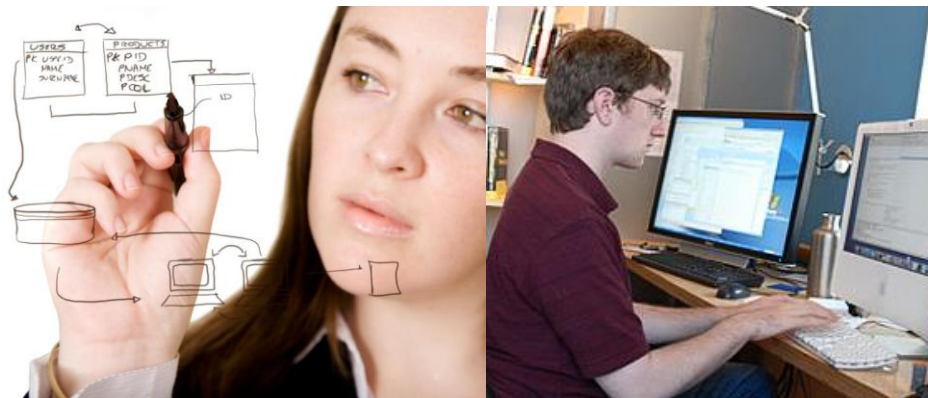   - Better staff retention

Educating – Who?

End-User Document Owners

Service Provider Document Producers

Hardware & Software Technology Vendors

Postal Authorities
& other delivery facilitators

Customer Facing, Sales, BDM

Business Analyst, Solutions Architect

Development

Production

...and those that supervise and manage them

Educating – Who?
Case Studies