HP Exstream

intelligent,
INTERACTIVE
document applications

Technology for better business outcomes

www.hpexstream.com

STREAMLINING
document processes

Enterprises conduct hundreds of business processes every day. Most of these processes are in place to optimize the relationship businesses have with their customers. Others are aimed at managing employee relationships. Research suggests that 70 percent or more of these processes have a common requirement to use or produce some type of document. Documents are used to collect data, to communicate internally, and to market, sell, and correspond with customers.

Documents, or communications, vary by format, content, delivery channel, and many other characteristics, and can generally be grouped into three categories:

HIGH-VOLUME—documents generated for a large number of customers at one time. These communications require scheduled production runs that process vast amounts of variable data, provided by various systems and data sources. Examples include monthly statements, bills, direct marketing, and correspondence.

ON-DEMAND—point-in-time requests for a specific document. These processes often involve people, like agents or customer service representatives, requesting a document through some type of interactive system. The system sends the data they have entered to a document service that composes the required communication and sends it back to the requesting system in real time. Examples include proposals, quotations, and correspondence.

INTERACTIVE—people interactively participate in the completion of a document by providing data or selecting content within the document itself. Common examples of interactive documents include enrollment forms, proposals, quotations, and correspondence.

Most enterprises deploy many systems and processes to address these different document application requirements, and attempt to integrate them through expensive projects. These attempts are often ineffective in meeting business and customer objectives, and end up requiring even more expense to maintain and support the systems.

To improve the customer experience, while increasing internal productivity and controlling costs, an enterprise document automation platform is required that supports all types of document applications and streamlines the related processes.

The
CHALLENGE
with *interactive documents*

While the creation of high-volume and on-demand documents is controlled by automated systems and processes, interactive documents are completed and managed by different people within different departments across the enterprise. Further complicating matters, enterprises typically have many point solutions and processes for different types of interactive document applications—some for creating letters or general correspondence, others for proposals, and still others for contracts, quotations, forms, enrollments, and other point-of-need documents.

Customer-facing associates, like agents, brokers, financial advisors, and customer service representatives, spend an inordinate amount of time completing different types of documents for clients—using everything from word processors to purchased application software and custom-built systems. This siloed and people-intensive environment is very costly for organizations, error prone, and lacks controls to ensure that compliancy and corporate standards are met.

Companies attempt to control this environment with thousands of different IT-developed and supported templates, but most are inflexible, preventing customer-facing employees from meeting the customer's needs. Integration with back-end systems is either non-existent or implemented through inefficient processes and expensive projects. This results in extraordinarily high development and maintenance costs to the organization, failure to provide customer-facing employees with the tools they need to meet customer demands, and ultimately, a less than optimal experience for the customer.

Interactive documents are often a single step in a larger business process. In some cases, the purpose of the interactive document is to collect information in order to update databases or to generate the final documents to be sent to customers. Manual processes such as re-keying data and making copies of documents are inefficient and error prone. These approaches generally result in errors that can have high costs and risks to the organization.

Without a common platform that seamlessly supports high-volume, on-demand, and interactive document applications, organizations can become trapped in a manual, error-prone, and inefficient environment that results in great expense—both in terms of customer retention and the bottom line.

The HP Exstream enterprise document automation platform combines robust functionality for design through delivery of high-volume, on-demand, and interactive document applications across the enterprise. The interactive environment provides a common infrastructure for managing the editing of most all types of documents, including the integration of edited documents with corporate systems and document production. Companies benefit by eliminating point solutions and manual fulfillment processes, resulting in more productive employees, significantly reduced costs, less strain on IT resources, fewer calls to customer service, and happier customers.

The solution is **HP Exstream**

The HP Exstream environment for building and deploying intelligent, interactive document applications is ideal for companies in all industries that want to provide customer-facing employees with the flexibility and autonomy they need to complete interactive point-of-need personalized documents for clients, while ensuring accuracy and controlling costs through centralized production and fulfillment.

The HP Exstream Live Editor provides users such as sales representatives, agents, customer service representatives, brokers, and branch office personnel with a controlled editing experience that speeds document completion, and ensures accuracy and compliancy with corporate standards. It can also improve process efficiencies for human resource functions by speeding employee benefit enrollment and other time-consuming forms processing activities.

Corporate standards, content, and compliancy are controlled through the centralized HP Exstream development and deployment environment. Interactive documents are deployed to users in the form of Live documents.

BENEFITS

- Reduce costs and improve consistency by eliminating point solutions for field-delivered documents—from proposals, letters, contracts, and forms, to other types of communications completed interactively.

- Reduce errors and miscommunications by controlling what content customer-facing employees can deliver based on built-in document intelligence.

- Improve customer satisfaction by automating follow-up and fulfillment from interactive document completion, such as sending personalized letters, enrollment kits, brochures, and more.

- Reduce employee training costs by replacing paper-based forms and their manual processes with intelligent, interactive document applications customized for different users. Documents actually "complete themselves" with just a few pieces of information entered.

- Reduce IT costs and complexity by reducing the number of document templates that need to be developed and supported.

- Reduce mailing and archival costs by centralizing the distribution of field-generated documents.

Traditional correspondence process

1 **Develop templates**

IT develops and maintains many custom systems for creating and deploying thousands of correspondence templates. This results in high maintenance costs, static content, and inefficient use of expensive IT resources.

2 **Find correct template**

Users find appropriate template to use among thousands. This can take time and presents opportunity for errors.

3 **Complete template**

Users complete template, but without guidance or controls for what content, fonts, or standards should be used. This presents opportunity for errors, carries risks to corporate branding, increases exceptions, and takes time.

4 **Send for review/approval**

Users send completed letter for approval. Slow back and forth review process compromises response time, lacks consistency, and is error-prone.

5 **Send to customer**

User prints final letter, manually addresses and mails. This is non-productive, results in higher postage, and lacks controls to ensure current address and corporate-approved packaging is used.

6 **Complete fulfillment**

If additional documents are required to send to the customer, users spend time initiating the fulfillment process. The manual pick and pack process is inefficient and error-prone, and other steps must be taken for records and archive management.

HP Exstream Live correspondence process

Live document application

① Design/deploy Live document

The HP Exstream GUI design environment is used to build the Live correspondence application and deploy it to a common repository for user retrieval. The Live document application is role-based and corporate compliant, and dynamically retrieves the most accurate content from corporate systems.

Edited Live document

Repository
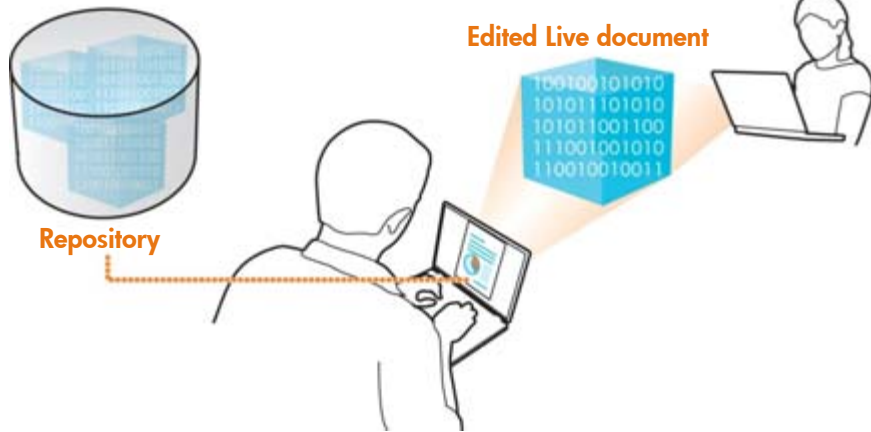
② Edit and manage Live documents

Users are provided with context-sensitive help and interview pages to guide them through completion of the Live document. Certain sections pre-fill with pre-approved content according to what the user selects, while other sections allow the user to include personalized text and graphics. Automatic revision tracking and the "change review" panel speed the approval process.

Edited Live document

HP Exstream
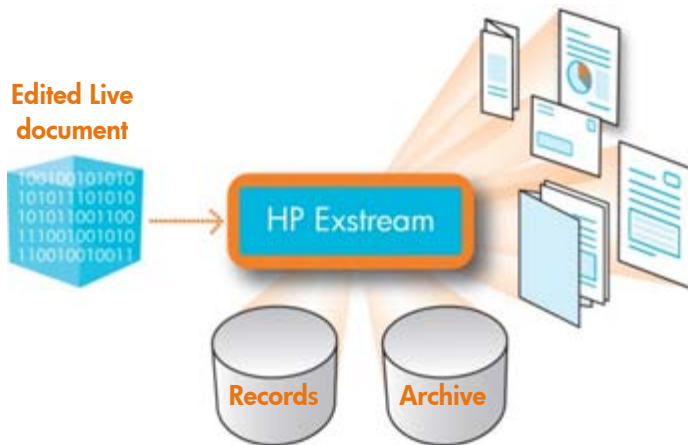
Records   **Archive**

③ Automate fulfillment processing

Live documents are retrieved from a common repository, copies are made for records management and archive systems, and edited data and content are used to update corporate systems and drive automated fulfillment.

How **HP Exstream** Live documents **work**

① **Design/deploy** Live documents

Live documents are designed and developed in the visual, collaborative HP Exstream design environment just like any other HP Exstream document. Using HP Exstream, the document developer has the ability to add editing controls and rules to the Live document application in order to manage user interactions, making some areas of the document editable, while locking others down.

The Live document 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 HP Exstream document applications, so most HP Exstream-created documents can be turned into Live documents, allowing for re-use.

Once tested in the HP Exstream design environment, the HP Exstream engine processes the Live document application to produce the Live document output for use in an interactive application.

Live documents are self-contained and portable, so they can be routed and managed like any other data file in the enterprise. Their XML-based structure makes it easy for external systems, like Enterprise Content Management (ECM) and Business Process Management (BPM) solutions, to easily retrieve data and content from Live document files.

Live document application

② Edit and manage Live documents

Edited Live document
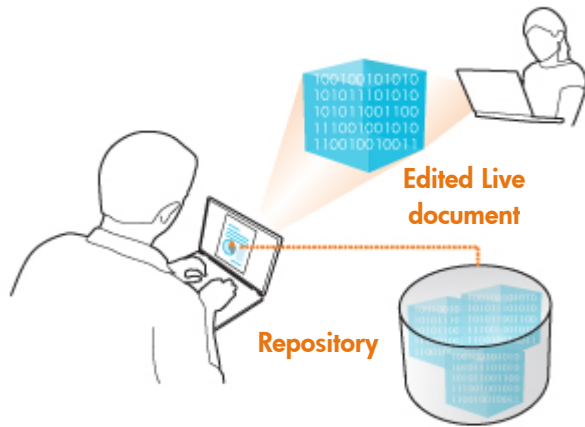
Repository

Live documents are portable and can be stored in the repository for user or application retrieval. The Live Editor provides a controlled editing experience and can be opened within a Web browser or run as a stand-alone desktop application.

Users enter information into predefined areas of the Live document. Depending on the information entered, certain sections, sentences, words, or images will automatically be included or excluded.

Live documents can also be role-based, so what the user sees and can edit depends on who they are and the rights assigned to their role. Based on logic in the Live document, the Live Editor can leverage Web Services or other connectors to communicate with corporate or external systems.

For example, the Live Editor can automatically retrieve current information for a customer after some identification has been entered, and automatically pre-fill areas of the document based on content from that source(s).

With Live Editor, users can create highly personalized communications on demand and at the point of service with the accuracy, flexibility, and speed they require.

When a secure or manageable repository is not available, affordable, or feasible, HP Exstream offers an infrastructure to store and manage Live documents that is optimized for driving an approval process. This capability connects the critical documents being created within the business to back-end processes, including records management, document composition, and centralized print or delivery.

③ Automate production and fulfillment processing

Edited Live documents may be used as input to the HP Exstream engine to drive other processes. Data and content can be extracted from the Live document and used to update corporate systems, generate new documents, trigger events, make copies of the edited document in other formats (such as for archiving and mailing), or be used as content within another document, which could be output in any format (such as AFP, PDF, PostScript®, etc.).

Live documents can be used as templates to drive delivery of personalized documents to many different people. Using an attached or defined distribution list, the HP Exstream engine processes the Live document with its rules to generate a document for each person on the list.

Enterprises can provide franchises or branches with the ability to localize and personalize direct mail pieces, while ensuring that brand standards and certain content remain unchanged. The local branch simply adds its content, such as custom images, provides the distribution list, and submits the Live document for processing.


Edited Live document

HP Exstream

Records   **Archive**
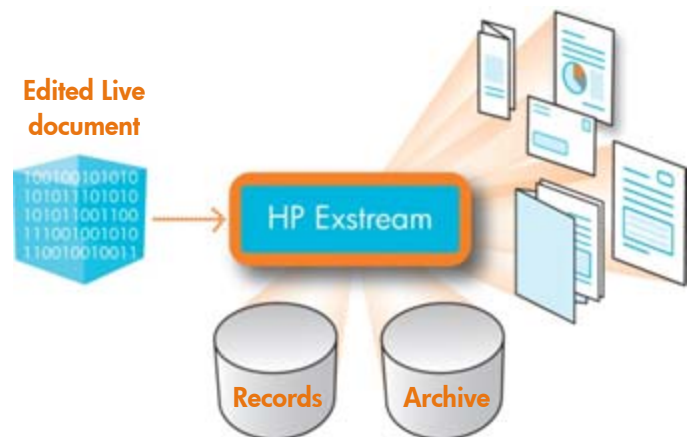
INTERACTIVE document
applications that *drive business*

Any business process that involves end users interacting with documents, or any interactive document process that exists to spawn other processes or generate additional documents, is a potential fit.

Some of the applications suitable for the HP Exstream interactive document solution include:

- Correspondence
- Proposals
- Contracts
- Collateral fulfillment
- HR forms

- Claims
- Group policies
- Enrollment/account opening kits
- Direct mail
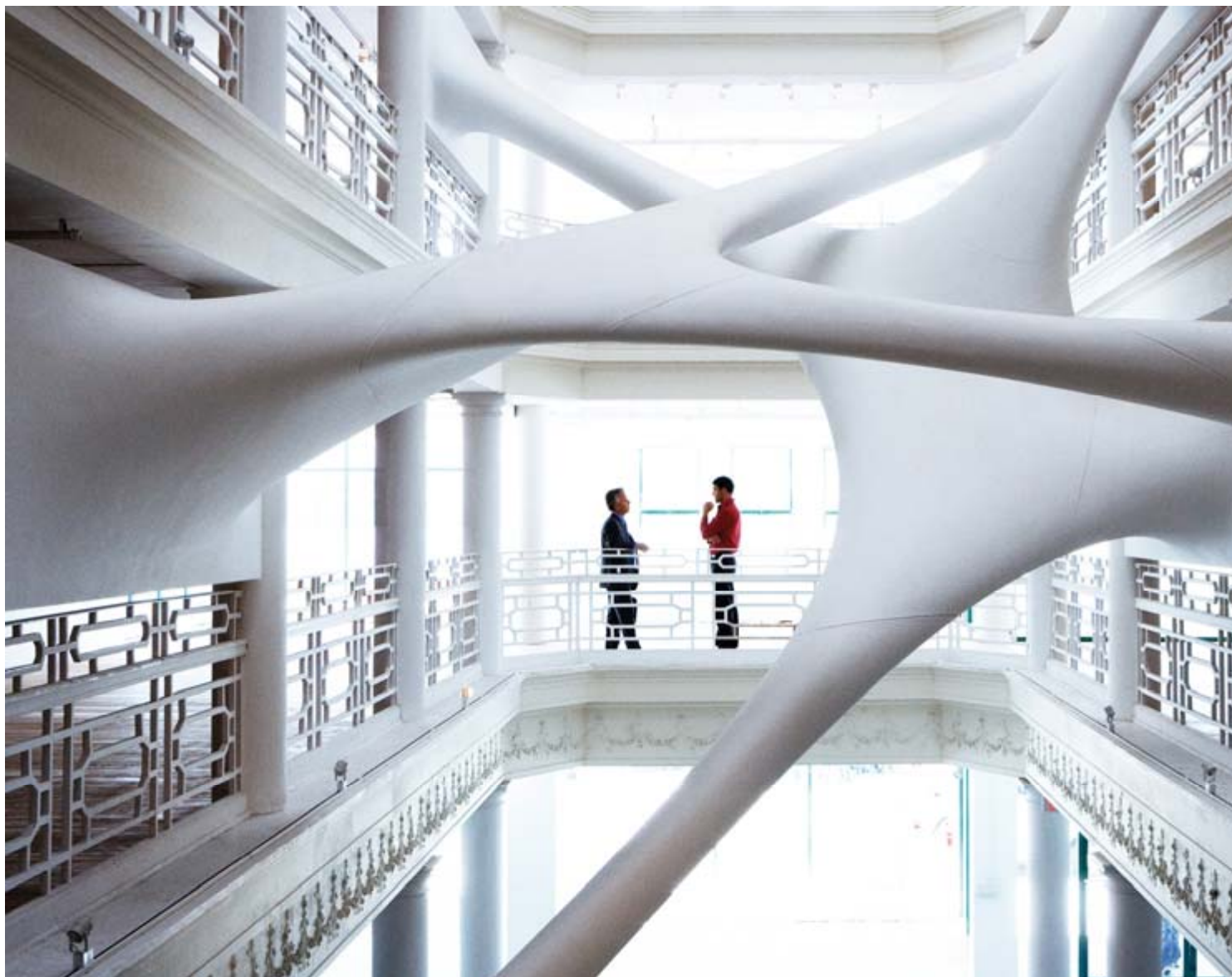
BENEFITS

- Eliminate point solutions
- Provide controlled editing experience
- Make any type of document interactive
- Improve customer experience
- Automate production fulfillment
- Ensure accuracy
- Personalize communications
- Automate and streamline document processes
- Significantly reduce costs
- Improve time to market
- Improve productivity
- Automate decision making
- Ensure compliancy
- Ensure consistency across communications
- Increase delivery speed

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document applications

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