



# eFIRST

## Consultancy Services



Enterprising solutions that keep your business moving

## Knowledge that will transform your document management – and your bottom line

To realise increased levels of efficiency and profitability in your organisation, improvements to business processes need to start at the very beginning. For the document management process, that means at the point where documents enter your organisation: the mailroom.

Improve, rationalise and automate the processes involved here, and you could potentially make savings in staffing costs of:

- up to 12% by providing automated assistance in data capture
- up to 58% by auto-classifying documents
- up to 66% by automatically capturing data from printed documents

If, at the same time, your documents are re-designed to take advantage of automation, there are even better cost efficiencies to be earned. To give you an idea, one of our clients, a leading UK retail bank, has improved automated data capture by as much as 80% as a result of forms being redesigned fit for purpose.

### Automation and re-design

To help you achieve these kinds of efficiencies, BancTec's eFIRST Consultancy Services division offers two complementary consultancy programmes: *Automated Mailroom Processing* and *Forms Design*.

Together, these programmes can:

- confirm the direction your organisation should be taking with document imaging
- identify the potential benefits of implementing a document capture management system
- recommend ways to improve the automation capabilities of documents – such as payment and application forms – which your organisation creates and subsequently processes

### Who better than BancTec?

As a worldwide provider of document management systems integration, business process outsourcing and services, BancTec is ideally positioned to transform your





document-related business processes. With at least 5 million documents or items scanned and processed by BancTec systems throughout the UK and Ireland every day, our experience in delivering high-volume, mission-critical document management solutions is second to none.

### **Taking a three-sixty view**

Improving processes and forms first of all demands a complete understanding of them. So our consultancy begins with a thorough analysis of key areas.

For *Automated Mailroom Processing* we look at current processes – establishing what they are, why and how they are carried out, what technology or other equipment

is used, whether the process can be improved, and whether new technology will lead to improvements. We identify your organisation's IT strategy to ensure we meet long term requirements, and we consider any current projects you're undertaking, which may have significant implications for the technology solutions we recommend.

For *Forms Design*, we look at the types of forms involved, their purpose and structure. We consider what external data is required and what fields need to be validated. Then we assess whether the forms can be improved and whether technology can help. We also identify which departments own the design for each form, and assess the impact of changing the forms – including its effect on your business.

### **Close partnership for mutual success**

Though BancTec brings valuable skills and experience to this analysis, it's not something we believe we should do alone. By working in partnership with you towards a common objective, the findings will be more accurate, the results more valuable, and the benefits of the exercise more fully realised.

Working together, we'll produce a top-level business analysis with the information you need to assess the benefits of process automation and forms re-design.

## **A logical approach to improving your processes**

Revolutionising your document management and revising your forms is a major step to take. So to ensure you have all the facts and figures at your fingertips before you make your decision, we conduct our analysis in three comprehensive phases.

### **1. Research and investigation**

A BancTec consultant works with you at your premises, to establish the facts about your document management or forms



## 2. Data analysis

The information is analysed to define possible improvements and identify where new technology would work best

## 3. Conclusions and intelligence report

The results from the first two phases are compiled and presented to you in an in-depth, comprehensive written report, giving you a permanent record of our analysis and findings, and a valuable reference document to support your future decision-making

## Research and investigation

To help you improve your document management processes or the design of your forms, we need to know:

- your current document management processes, or how your forms currently look
- why things are done that way, or why the forms are used
- how things are done or how forms are used
- what equipment or technology is used

To find this out, we undertake a comprehensive, top-level analysis.

For example, if we were to examine the process of 'customer requests for information' from start to finish, this would involve us not only looking at the types of requests you receive from customers, but also at how you receive them, where they go to within your organisation, how they get there, how they are dealt with and your response to the customer.

Other aspects of our research and investigation into mailroom processes include:

a review of:

- organisation charts
- process manuals
- listings of functions and roles

matching of:

- processes to departments
- functions to departments

top level analysis of:

- processes
- tasks
- systems

For *Forms Design*, the comprehensive analysis we undertake includes:

a review of:

- all forms being processed within the organisation
- form owner requirements
- listings of functions and roles

matching of:

- data that needs to be validated

top level analysis of:

- form processes

Acquiring all the necessary information will involve us working closely on site with members of your project team – conducting interviews, reviews and audits, and analysing forms. We will also examine your organisation charts, process manuals, and manuals for specific functions, roles and procedures.

By working with members of your staff who have a knowledge of the project and an in-depth understanding of the organisation and operations, we can ensure that the data we gather is as accurate and relevant as possible.



## Data analysis

Once the information is gathered, we can define key areas for improvements and any possible technology matches, as well as areas, processes and forms where technology or automation won't help.

It may be that one department needs one solution, but an isolated process somewhere else in your organisation needs another. Or that one form is used by several departments, where each have different requirements. Whatever the case, in this phase we'll analyse and consolidate our findings, so that you'll know whether you can improve what you do, whether technology or form re-design can help, what could or should be done, and a strategy for making those improvements.

We'll also outline the implications of doing nothing.

## Conclusions and report

Our conclusions are delivered in a focused intelligence report forming a valuable reference document to assist you in your plans to transform your mailroom process and other document-related areas of your business.

As relevant and constructive as it is comprehensive, our report reiterates the purpose, scope and objectives of our consultancy, and the tasks we performed in carrying it out. It also provides a background in the shape of a customer overview and outlines our methodology.

Delineating the data gathered in the course of the exercise, the report includes a focused review of our findings, including – for *Automated Mailroom Processing*:

- review of organisation charts, process manuals, listings of functions/roles
- matching of processes and functions to departments
- top level analysis of processes, tasks and systems

– and for *Forms Design*:

- review of all forms processed in your organisation, of form-owner requirements and listings of functions/roles
- matching of data that needs to be validated
- top level analysis of form processes

A summary of the findings (what you do, how and why you do it and the technology used; or what forms are used, how and why) is followed by an assessment of the possible changes, and recommendations on the best steps for you to take.

Finally, the report contains all the findings and information you need, to facilitate your decision-making process. With the comprehensive data and incisive assessment the report provides, you will be able to take the right decision, based on concrete facts, more quickly and more confidently – so your business can move forward faster and more effectively.

## About us

BancTec is one of the largest document capture and business process management vendors in the UK and Ireland.

Our 30 years' experience in the processes and technology for document handling and capture includes:

- Processing 500,000 applications forms per day for a major loyalty company
- End to end processing of 5,000,000 items per correspondence for two major credit card companies
- Provision of a centralised mailroom for a Major UK retail bank and Share registrar
- Processing all pharmaceutical prescriptions in England, Wales and Scotland
- Processing 90% of all cheques cleared in Ireland
- 36 million airline tickets processed per year, supported by an image archive that can store 1 billion transactions - allowing worldwide retrieval of ticket images in less than 3 seconds

By improving organisations' mailroom processes and document handling, and re-designing their forms, we help them to:

- Gain a commercial advantage through faster processing of claims or applications
- Improve data quality and integrity
- Improve customer service
- Reduce productivity lost through mis-filing or lost items
- Recover faster from disaster
- Meet compliance standards

## The next step

If you would like to find out more on BancTec's eFIRST Consultancy Services, or if you would prefer a BancTec representative to call and discuss your requirements, please contact us.

Call our Marketing Department on 01753 778706 or email us at: [ukmarketing@banctec.co.uk](mailto:ukmarketing@banctec.co.uk).



**BancTec Limited,**

Jarman House,  
Mathisen Way,  
Poyle Road, Colnbrook,  
Slough SL3 0HF

**Tel** 01753 778888

**Fax** 01753 778707

**Web** [www.banctec.co.uk](http://www.banctec.co.uk)

**Email** [ukmarketing@banctec.co.uk](mailto:ukmarketing@banctec.co.uk)