

## CUSTOMER PROFILE

- Trade association and service provider for Credit Unions in city M in Canada, jointly owned by those Credit Unions financed through assessments and fee income derived through its operations

## KM SALES

- BCA Direct Sales

## CUSTOMER NEEDS

Our first project was to improve a communications process where multiple staff, each working in separate silos managing spreadsheets and content, all contribute to a quarterly communications to the 140 credit unions that they support. This communication is largely about monetary allocations and as such is a very important communication to the C-suite at each of the 140 credit unions. Using DP, we have automated the way the letter is created and how the variable data is dynamically added - no one recipient receives the same monetary allocation and they are all at separate locations (dollar amounts and recipient are the key variable data)

## SOLUTIONS

> Dispatcher Phoenix Finance Package with Release2Me for 10 bizhub MFPs

\*R2Me - At whatever point COVID-19 ends, and if they assume operations as before, R2Me will still be deployed. We have not completed the R2Me implementation.

As part of the solution R2Me was sold to provide a print management tool that would help departmental printing workflow and reduction in printing costs. The customer owns and works in a 4 story building with primary departmental work for CIO team taking place on 1st floor and 4th floor. R2Me was sold as it provided the follow me print release workflow client needed. They did not require anything more complex, so the R2Me was ideal fit over Papercut. The secondary outcome client looking for was to reduce abandoned print.

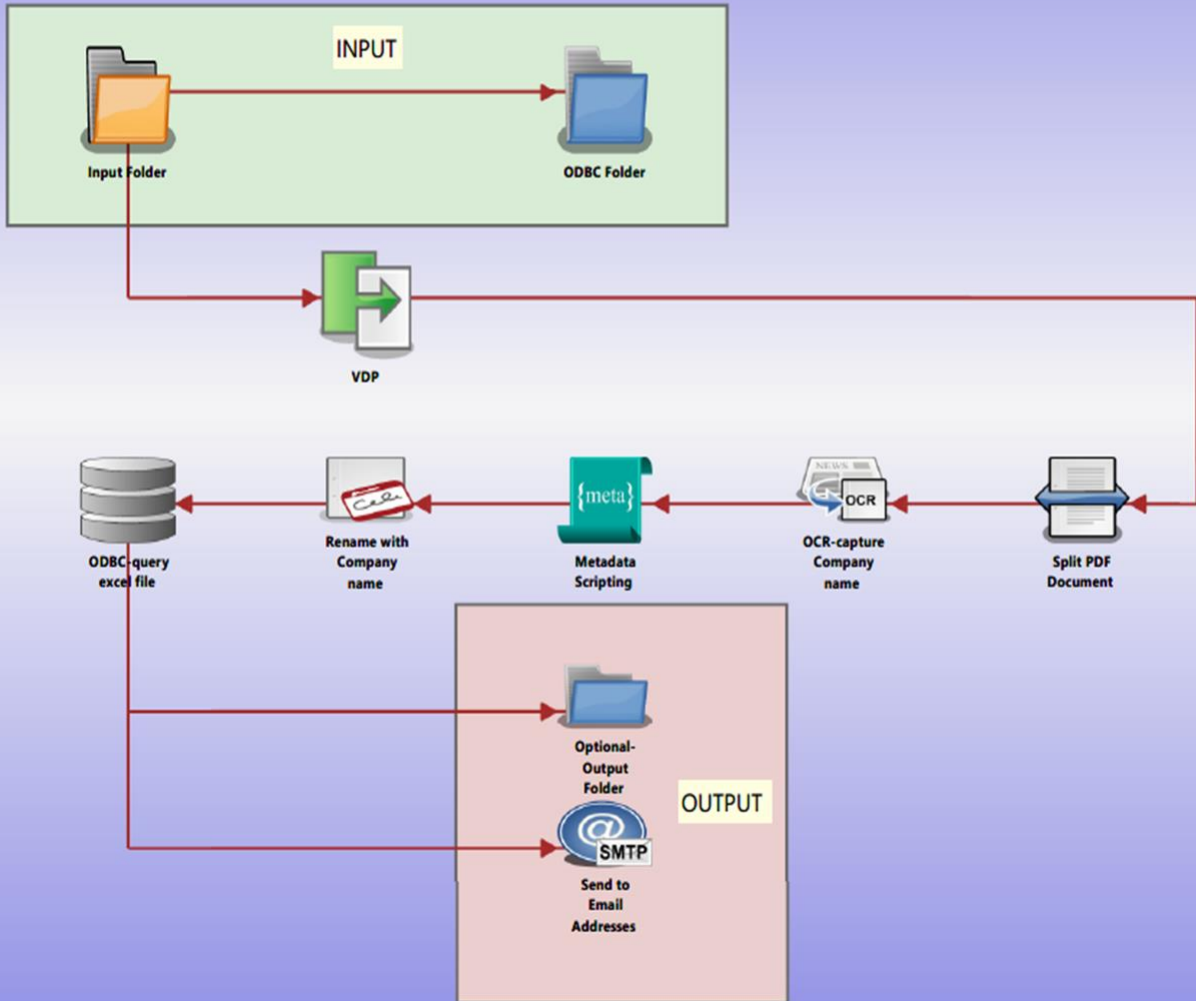
## KEY SUCCESS FACTORS

Client chose DP as it was a low cost solution with an ability to directly impact the way the users in the business were working (all of the right conditions existed and were ideal for the scenario). Client was not ready for a full blown ECM play, that is on deck for 2021 but as step one we needed a way to address/ solve challenges with department level processes. With this we reduced a quarterly business process from several hours down to minutes - letter template grabs all the variable data and distributes to the 140 end points via SMTP and we archive the letters when done. The emailing function alone consumed several hours as previously this was a manual process, now achieved in seconds, making the customer extremely satisfied!

# ADDITIONAL INFORMATION

➤ Deployed workflow as illustrated below:

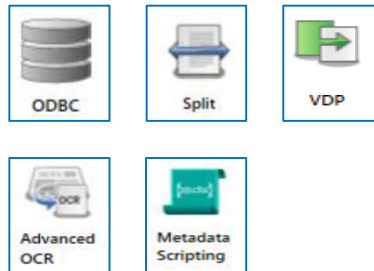
Workflow will collect variable data from Watch Folder and will use a template PDF document within VDP node that will create personalized PDF document; split, capture email destination and send to email



## CAPTURE



## PROCESS



## DISTRIBUTION

