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Seven Questions to Ask when Standardizing on an Enterprise Document Generation Platform

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For years document generation has been a back-office, print-centric operation. Now documents are increasingly initiated on an ad-hoc or event-driven basis, such as correspondence resulting from an interaction. The industry is moving past basic batch applications to enable front-office and call center employees to provide quotes, applications, agreements and other time-critical documents at the point of need.

Furthermore, the industry is moving toward a multi-channel approach to communications. Consumers today are more demanding and expect one-to-one messages with advanced personalization and use of new digital output channels, such as email, SMS for mobile phones, and even voice mail messages. Delivering personalized correspondence via not only print, but also electronic channels invites greater loyalty and reduces the chance that customers will take their business elsewhere. An effective enterprise communications strategy can significantly enhance customer service, dramatically improve efficiency and, ultimately, take profitability to new heights.

These two trends are leading many organizations to consider modernizing their legacy applications and to standardize on a single platform for content creation. The choice of an enterprise platform to manage the process of high-volume enterprise document generation or composition is a strategic decision which will determine how well your organization is positioned to meet the business communication challenges of today and those of the future.

As you look to choosing a vendor to support the production of personalized communications, what should you consider? This article outlines some key questions to ask in purchasing an enterprise solution. As the traditional distinction between documents and electronic communications fades, the recommendation is that organizations look for ways to use message output more effectively in applications and business processes by developing content-enabled applications. It s critical to look for a solution that can carry you beyond today s needs into the future of enterprise communications.

1. Business User Enablement
How much does the platform rely on technical experts in your IT department, vs. empowering business analysts and/or marketers to really control the template-authoring process? Is the system designed for business users or the technology department?

Why this is important: IT can often become a bottleneck in updating and managing document templates. A system that has been designed to enable business users to own the content-authoring process will provide for enormous operational efficiencies and support quicker user adoption.

2. Support for Multi-Channel Communication Templates
How does the platform support the output of both print as well as digital content? Does it require separate templates for each format? Or, does it allow the content to be stored independently of presentation, so that a single template can drive multiple output channels, including print, fax, email, Web or XML?

Why this is important: This can also create operational efficiencies in streamlining the number of document templates you need to manage. If the template text is maintained independently of the look and feel, you can reuse content and make sure each version of your communication is in compliance with corporate standards.

3. Ad Hoc Correspondence Output

How does the platform provide for the creation of ad hoc communications in real time? What is the process for intercepting a document before it is finalized, making changes to it and submitting it back to the centralized production environment?

Why this is important: Correspondence should be a fully integrated capability of the system and not just a bolt-on feature. When your call center personnel can access a centralized system of correspondence output, they can respond to inquiries faster and with greater accuracy, thereby improving customer satisfaction and loyalty.

4. Open Standards-Based Technology Architecture

How does the platform make use of the newest XML technologies, and whether it complies with open standards at every stage of the document generation cycle?

Why this is important: While in the past, many organizations relied on Word processing macros or mainframe, print-based solutions, companies are now moving toward solutions that fit into a Service-Oriented Architecture environment and use Web services for greater flexibility and interoperability. Organizations are also turning to XML standards to improve communication with business partners. As you move away from proprietary siloed systems, you can gain enormous agility and future-proof your IT investments.

5. Integration with Enterprise Content Management

How does the platform integrate with your existing legacy ECM systems? Leading document solutions produce a tremendous amount of electronic documents and records. You want rapid integration with your current environment so that your document output is archived and secure. In addition, ask how the platform manages version control, security and approval processes.

Why this is important: Interoperability with your legacy systems saves you money. Furthermore, your compliance team needs to demonstrate that content is created in accordance with corporate and brand standards, and it needs to show audit controls.

6. Integration with Business Process Management

How does the platform support transactional content creation? How does it integrate with leading Business Process Management solutions to support straight through processing? Does it incorporate exception handing rules to route documents for review and approval? Can it output your communications to XML messages to trigger automated business processes?

Why this is important: Streamlining business processes removes manual steps and can deliver enormous savings. Furthermore, automating exception management can help support compliance requirements and prevent inaccurate communications from being released.

7. Scalability

How well does the platform scale for large input file, high-volume output and high-availability resilience across multi-processors and multi-server environments?

Why this is important: You need insight into whether multi-processor/sever scalability is built into the product or if it must be engineered by hand. This may also provide insight into whether the vendor s code is single-threaded, which is major obstacle to scalability.

In Conclusion

Organizations that make the most of their business communications   not only to customers, but to partners and employees as well   can increase product and service differentiation, not to mention significant cost savings and productivity increases. Make sure you ask these seven questions when considering the best vendor for your organization.

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