

## Drake Business Logistics | Digital Mailroom

### The Evolution of the Mailroom

Within any organisation the mailroom is the nucleus of information handling. The majority of incoming and outgoing items pass through the mailroom, including sensitive business and financial information. Traditionally it has been seen as the entry point for physical mail, documents, packages, goods and other items that arrive at the organisation, from where they are distributed within the organisation and from where they are sent back to the outside world.

This is fast changing. The mailroom is feeling the impact of a fundamental shift in the management and handling of not only documents, but a broader range of information.

There is a growing recognition among senior management of the value that

the mailroom can provide as not just a physical 'logistics hub', but as an automated, digital 'information hub'.

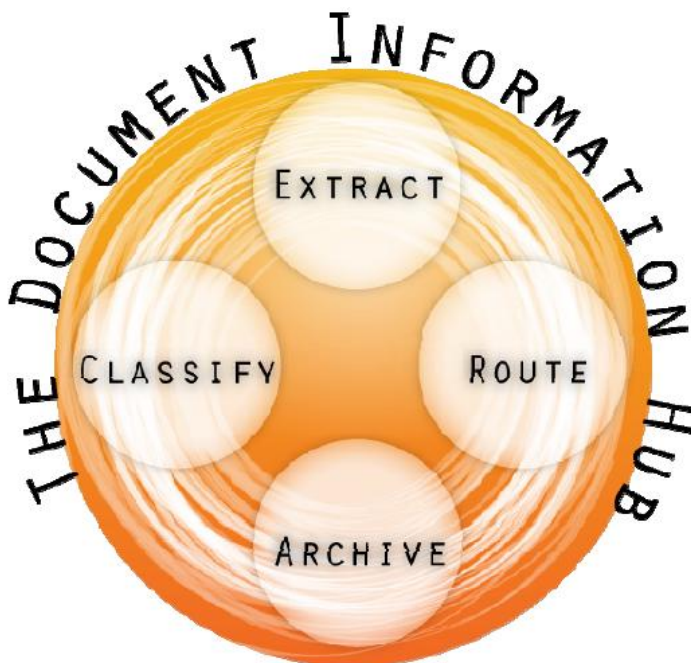
Swiss Post Solutions has been at the forefront of identifying the role and value of the digital mailroom in the organisation and has been investing in DBL's capability for delivering integrated digital and physical document delivery solutions, whilst also working with its customers to understand the value of managing content via 'the information hub'.

### Managing content to create value

Streamlining core business processes has become a strategic imperative for financial services organisations. The efficient and reliable harnessing and utilisation of content is a complex task and financial services organisations are assessing their systems and level of process integration to establish a foundation for an enterprise-wide capability. The past approach to managing content around a defined and discrete task or process no longer suits today's need for information sharing and collaboration across the enterprise in a manner that is both secure and compliant with regulatory requirements.

In our experience the following are fundamental to recognising the value of managing content:

- Content drives organisational activity and as a result, the controlling and streamlining of the flow of content throughout the organisation improves the margin for most operations



- The requirements for regulatory-compliant communications are unconditional and the pattern of privacy related regulations continues to present challenges to organisations in maintaining stringent controls
- Paper remains a pervasive communications device despite the growing acceptance of electronic communications. Sustainable competitive advantage in the informative intensive financial services sector demands that e-delivery be commensurate with customers' expectations for first rate, personalised service
- The adoption of an end-to-end enterprise approach to managing content is driven by four primary objectives: cost reduction, optimisation of business processes, enhancement of customer service and reduction of regulatory compliance risk.

### Centralising Document Services

We have successfully designed a solution based on the establishment of Business Service Centres (BSC) to consolidate and centralise the primary services undertaken. If appropriate the facility and processes are also designed

to provide centralised indexing in the case of local and global projects. Local on-site delivery teams are reduced to a minimum and can focus on on-site services, such as courier management and physical mail. Once digitised the electronic documents are indexed and may be submitted to the relevant business workflow.

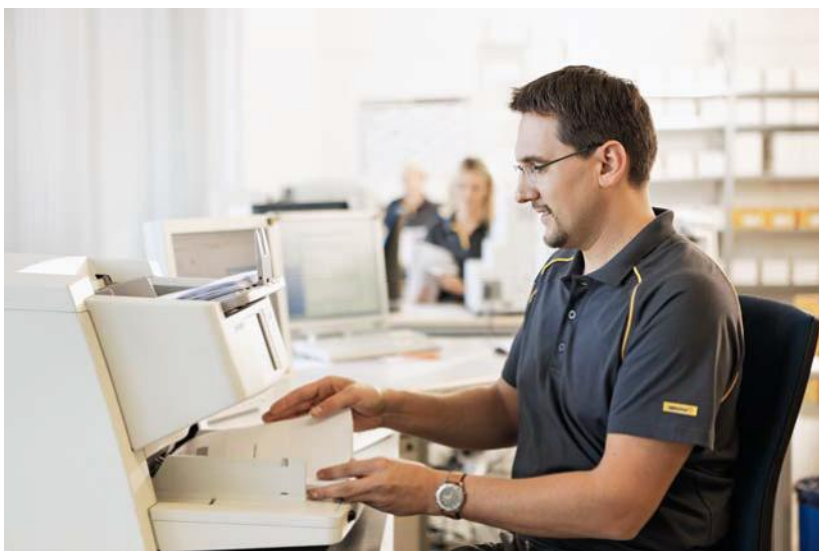
### The Integrated Services Platform

To manage the different types of files, electronic and paper, we have developed the Integrated Services Platform (iSP), which provides both user and program access to our services through a standard web browser. The iSP is independent of your organisation's enterprise content or workflow system and will automatically direct the user's request depending on the status of the file:

- Locally filed document – options to request the physical file or receive an electronic image, either through a workflow system or via a direct user interface
- Archived document – a virtual database will ensure that all archived assets are available for request via the DSP
- Imaged file – if a file has been previously imaged the user will be directed to the repository where the image resides, subject to the users authority to access that image

### Mail Processing

Our strategy is to centralise primary mail receipt into BSCs and transform as much of the incoming post into digital form as possible. Essential to this approach is the establishment of a single business address where all mail would be directly delivered.



#### Drake Business Logistics

Level 14, 77 King Street, Sydney NSW 2000, Australia  
T: +61 2 9273 0600 F: +61 2 92475993 [www.dbla.com.au](http://www.dbla.com.au)  
A service delivery partner of SPS

#### Drake Business Logistics

Level 7, 45 Queen Street, Auckland 1010, New Zealand  
T: +64 9 379 5610 F: +64 9 377 3893 [www.dblnz.co.nz](http://www.dblnz.co.nz)  
A service delivery partner of SPS

After physical scanning, the digitalised mail would be transferred to the Document Processing Centre, where it is validated and processed in accordance with pre-agreed business rules, before being formatted and inserted into the enterprise content or workflow system.

### Archiving and Filing

Our approach in respect of archiving and filing is twofold:

#### New Files

- All incoming mail is converted to digital documents and electronically indexed so that use of physical files is reduced or eliminated
- Attachments generated within the business are scanned, indexed and inserted into the relevant digital file within the enterprise content or workflow system

#### Legacy Files

- Actively manage existing contracts through market testing and coordinated oversight of suppliers
- Audit existing files/boxes to ascertain activity levels and identify documentation for immediate destruction
- Work with your organisation to manage the retention/destruction policy in order to reduce holdings as much as possible
- On a continuous basis, using BSC and local services downtime, convert physical files to digital, index and insert data into document workflow

### A harmonised paper and digital world

The benefits of a harmonised world of paper and digital are considerable and include:

#### Cost reduction

- Elimination of manual, labour-intensive document processes
- Reduced print and postage with electronic content distribution
- Real-estate savings

#### Compliance

- Demonstrate compliant content handling with security controls and consistent records management
- Reduce regulatory risk by permission and version controls

#### Business Optimisation

- Leverage virtual folders and content rules to automate cross functional business processes
- Accelerate processes in new business, loan origination, claims processing, new account opening and customer services
- Ensure that the right people can access the necessary information as required to optimise business processes and decision-making

#### Customer Service

- Accelerate new account, claims and complaints processes
- Shorten call times by providing – on their desktop – all of the information that customer service representatives need to respond quickly
- Provide information to support customer loyalty and marketing

#### Sustainability

- Electronic access to scanned documentation eliminates physical movement of documents and associated carbon cost
- Reduced requirement of document archiving facilities
- Centralised secure document destruction and recycling