

A print outsource solution with the ability to apply printer tray selection and validation checks to PDF documents, improving regulatory compliance and providing feedback for service improvements.



First Central Insurance Management Limited is a rapidly growing business providing administrative services such as Customer Service and Claims Management on behalf of First Central Insurance Services Limited. Launched in 2008, the company now has over 250,000 customers, and aims to build a solid brand name that customers and staff alike will associate with a dependable and reputable product.

Project overview

First Central approached WML initially with a requirement for conditioning documents produced from SSP Insight to enable them to outsource the production to an external facility for print and fulfilment, in particular by enabling printer tray selection.

After discussions with WML, it became clear that document quality control was also a high priority for First Central, as a route to improving compliance with regulatory requirements, as was the potential to create an audit trail for document delivery.

WML's document content control (DCC) component offered the solution to tray selection, audit trail, and document validation requirements. Furthermore, its data-gathering feature could be harnessed to provide the First Central team with management information that they could feed back into service improvements.

Implementation

A project was initiated to implement content-controlled outsourcing to Berforts, a digital print services provider with facilities for print-on-demand and fulfilment.

WML's DataGateway software was configured to perform the required document manipulation and validation tasks:

- **Fulfilment & audit trail:** prepare documents for fulfilment stages, with printer tray selection and the addition of an out-for-mail barcode to track individual documents.
- **Test completeness:** check that documents include all required pages.
- **Validation:** perform checks on some 50 fields within each document to make sure that all required information is present, and that certain fields, such as dates and monetary values, are within sensible ranges.
- **Select destination:** modify output destination according to whether document inserts are required at the fulfilment stage.



WML DataGateways were installed at First Central and at Berforts, and configured to enable secure, encrypted delivery of validated documents from First Central to the production site. For efficient production management, WML's output batching feature was introduced, so that each day's documents could be printed and fulfilled in a single batch for each output queue.

Further to receiving standard daily and monthly reports of content-controlled documents from the DataGateway, First Central wanted to produce custom reports based on information gathered from documents passing through the system. Direct read access to the DCC database allowed them to produce the customized reports that they required.

Project outcomes

Print outsourcing using WML's DataGateway solution has provided several business improvements for First Central.

"Although initiated mainly as a cost saving exercise, print outsourcing has led to the whole document production process being automated and is considerable more reliable and less labour intensive. We have also saved at least 30% on document production and fulfilment.

"We have found that we can set standard business rules to be applied to each document type using WML content control. We definitely get fewer document errors and subsequent support calls from customers.

"Using WML's reports and audit trail we have a complete overview of our outsourced document production. This allows us to accurately calculate our production costs and bottle necks in the workflow.

"We are very happy with WML support and responsiveness, the software has been in use for some time now without any serious issues."

After using the DataGateway software, it became apparent to First Central that it could be used as a full document management system.

"We are now able to do most projects in-house, using standard desktop tools to produce PDFs rather than using expensive production companies to do the work for us."

When they launched a new finance company in 2012, First Central decided to use the print outsource solution through WML and Berforts for the new stream of customer letters. Print outsourcing has provided a scalable solution for the production of these documents.

"Although volumes are fairly small on Finance at the moment, this will ramp up soon, and wouldn't be practical to keep in-house.

"I have always found WML to be very helpful and responsive, providing assistance, explanation and advice when required, and feel that we have a good working relationship. We will be moving more documents over to the outsource solution over a period of time, and I feel comfortable that we can work with WML to do this."

Janet Mansfield, Business Change Analyst, First Central Insurance Management Ltd