

# OCR FOR ANYDOC® IS JUST WHAT THE DOCTOR ORDERED

## At A Glance

### DR. LEONARD'S HEALTHCARE

#### Industry

Direct Mail Catalog

#### Challenge

Dr. Leonard's wanted to improve the processing speed of incoming orders and the return order cycle while decreasing labor costs.

#### Solution

By expanding its use of OCR for AnyDoc® from automating its incoming order form processing to also eliminating the hand-keying of return order form information, Dr. Leonard's was able to dramatically increase productivity.

#### Benefits

- Annual labor savings exceeding \$550,000.
- Agent productivity jumped by more than 80%.
- ROI delivered in less than 12 months.
- Time to credit a customer's account dropped up to 50%.

Research indicates that past performance is an accurate predictor of future performance—and with this in mind, Dr. Leonard's Healthcare Corp., comprised of the *Dr. Leonard's* and *Carol Wright Gift* catalogs, didn't hesitate to expand their use of AnyDoc Software's OCR for AnyDoc®. Originally implemented to process incoming mail orders, Dr. Leonard's also turned to the award-winning document and data capture solution to process merchandise order returns.

Dr. Leonard's is a leading direct mail catalog marketer of home healthcare, comfort, and convenience products targeted at individuals over 55 years old. Established in 1975, the Edison, NJ company operates two catalog titles, *Dr. Leonard's* and *Carol Wright Gifts*, as well as the co-branded catalog titled *Roaman's Healthcare Catalog by Dr. Leonard's*. The majority of Dr. Leonard's clients are senior citizens and according to Gary Porto, VP of Operations at Dr. Leonard's, most of which prefer to place their orders by mail, enclosing a paper check for payment along with a handwritten order form.

Although the average age of their mature customer base drives an unusually high percentage of mail orders, Dr. Leonard's hasn't held back on using technology behind the scenes to improve the company's efficiency. After participating in a hands-on demonstration hosted by OPEX, a leading mail extraction hardware vendor, Porto and his team saw firsthand that mail extraction and scanning technology had advanced far enough to be an efficient solution for mail order processing. In 2004, with the help of CPT Intelligent Technologies, a systems integrator and AnyDoc Software reseller, Dr. Leonard's implemented a complete mail extraction and document and data capture solution, automating the processing of their incoming mail order forms.

*"...the labor expenses associated with opening the mail and manually entering the order information were a significant portion of the company's mail order fulfillment costs..."*

Prior to 2004, all incoming mail orders were processed manually. Envelopes were opened by hand and counted out into stacks of 50. Each stack was assigned a tracking number in the company's mainframe system and passed along to one of more than 30 data entry operators, who then hand keyed in the order and payment information from the paper order form into the mainframe system. With approximately 300,000 mail orders received each month, the labor expenses associated with opening the mail and manually entering the order information were a significant portion of the company's mail order fulfillment costs.

The first step of the initial implementation was to deploy a pilot system. The system consisted of an OPEX Model 51 Rapid Extraction Desk, an OPEX AS3600i scanner, AnyDoc Software's OCR for AnyDoc and the company's mainframe. By running the automated pilot system in conjunction with the existing manual system, it was easy to see that the system would perform even better than originally estimated. In fact, at full production, using the automated solution, operators were able to nearly double their manual output of 60 incoming orders per hour per agent to an average of 110 orders an hour.

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Although a significant investment, the increase in productivity actually paid for the system in less than 12 months. "We estimated that we saved \$2,000 a day in labor costs as a result of the forms processing solution," said Porto. "This translates into an annual savings of more than \$500,000." Customer service was also improved. Because the incoming orders are being processed faster, customers are receiving their merchandise sooner. And if a customer calls with a question about an order, agents are now able to access the original order form image with just a few keystrokes.

Porto said: "Order forms come to us in a variety of levels of readability. Customers won't always use the space provided for their order request or return and will handwrite other notes on the form. Even with this quality challenge, we are able to OCR 93% of incoming order forms and use the software's key-from-image component on another 3%." Porto continued, "OCR for AnyDoc's high level of handprint recognition is a huge boost for our productivity and made us confident that the solution could also effectively handle our return order forms."

When the decision was made to replace the manual data entry of the return order information with a more efficient automated solution, it was a no-brainer to turn once again to AnyDoc Software and CPT Intelligent Technologies. Pleased with the results garnered from automating the incoming order forms, Dr. Leonard's decided to use the same OCR for AnyDoc document and data capture technology to process the return forms.

Dr. Leonard's original manual process for handling the return order forms was similar to that of the incoming order forms. Once separated from the item packaging, the return order forms were manually counted out into batches of 50. Then the return information contained on the form needed to be hand keyed into Dr. Leonard's mainframe system before the return could be reviewed, a customer credit issued or an exchange made. Agents were able to manually enter approximately 36 returns into the mainframe system an hour, but with approximately 1500 returns received daily, the equivalent of nearly six full-time employees was needed just to keep up with the manual data entry portion of processing the returns.



"...We estimated that we saved \$2,000 a day in labor costs as a result of the order processing solution. This translates into an annual savings of more than \$500,000... and by adding the OCR for AnyDoc software to our return process, we are able to save an additional \$60,000 a year in labor costs..."

**- Gary Porto, VP of Operations,  
Dr. Leonard's Healthcare Corp.**

Now instead of manually counting out stacks of return forms into bundles of 50, the return forms are now scanned into OCR for AnyDoc. The data capture software extracts the required data and presents only questionable characters or business rule violations to the agents for verification. Once the return order data has been verified, it is quickly transferred to Dr. Leonard's mainframe system along with the return order form image where a credit or exchange can be issued, as appropriate.

*"...OCR for AnyDoc's high level of handprint recognition...made us confident that the solution could also effectively handle our return order forms..."*

Because agents no longer need to manually key in all of the return information, productivity has more than doubled. With the AnyDoc solution, agents are now able to process an average of 80 returns an hour, up from 36. Porto commented, "By adding the OCR for AnyDoc software to our return process, we are able to save an additional \$60,000 a year in labor costs – a critical savings when other costs such as transportation, postage, and insurance costs continue to rise." The increase in throughput is also a benefit to customers, who now see their credit for returned merchandise applied up to 50% faster – down from 2-to-3 days to just 1-to-2 days. And, the images of the returns are also available for customer service agents receiving customer's calls.

Together with solution provider CPT Intelligent Technologies and AnyDoc Software, Dr. Leonard's continues to look for ways to utilize automated technology to improve efficiency in departments across their organization. This goal allows Dr. Leonard's to remain competitive in a changing market and to continue delivering quality products directly to their customer's door at an affordable price – critical to their mature client base and their continued success.

## Partner Profile

### **CPT Intelligent Technologies, Inc.**

CPT Intelligent Technologies, Inc. is a system integrator specializing in document and data capture, workflow, and enterprise content management. Located in Flemington, NJ, CPT has provided solutions for business and industry since 1957.

#### **To learn more**

about CPT Intelligent Technologies, Inc. visit [www.cptinfo.com](http://www.cptinfo.com)

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Check out our case studies and see how you can save time and money at your own company.

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# Complete Line of Products

Since 1991, AnyDoc Software has met the document and data capture and classification requirements of thousands of companies worldwide. Our products and solutions all operate from the ease-of-use, stability and enhanced functionality obtained from years of experience and innovation.

## Products

**OCR for AnyDoc®** : Automatically capture data from nearly any business document. Eliminate the costs and errors associated with manual data entry.

**Infiniworx®** : Simplify and automate how your company processes documents with this innovative drag-and-drop workflow development platform.

**AnyDoc®CAPTUREit™** : Scan documents from anywhere in the world, perform quality assurance and send images over the Internet to a central location for processing.

**AnyDoc®DESIGNit™** : Easily design your own professional forms for printing or to use as a template in OCR for AnyDoc processing with easy-to-use click and select toolbar features.

**AnyDoc®EXCHANGEit™** : Convert extracted data to a variety of file formats for use among multiple applications. EDI, XML, ASCII and others are available, as are APIs to leading document management solutions.

**AnyDoc®MANAGEit™** : Optimize your AnyDoc processing with real-time monitoring of batch level status, station activity, pending work and more.

**AnyDoc®VERIFYit™** : Perform data verification at a central location or off-site – allowing you to save valuable office space. Ensure data accuracy, no matter where your employees are located.

## Market Solutions

**AnyDoc®CLAIM™** : Automatically process CMS-1500, UB04 and dental healthcare claim forms.

**AnyDoc®CLASSIFY™** : Automatically sort, batch and route all your documents, quickly and easily.

**AnyDoc®EOB™** : Automatically capture, validate and balance EOB data from all your payors — and increase productivity and decrease processing time while lowering costs.

**AnyDoc®INVOICE™** : Automatically process invoices to lower manual data entry costs and turn incoming invoices around in hours instead of days.

**AnyDoc®REMIT™** : Automatically capture remittances and checks and the associated critical data for much quicker input into your financial or ERP systems.

**AnyDoc®Patient Records™** : Minimize human error by automatically identifying, sorting, indexing and capturing information from patient records.

**AnyDoc®MORTGAGE™** : Get critical loan information into your mortgage processing system quickly and with even greater accuracy by minimizing manual data entry and pre-sorting.

**AnyDoc®NOTICE™** : Provides quick identification and data capture of insurance policy notices—speeding processing and increasing opportunities for revenue generation.

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