

REDI-MAIL REAPS THE REWARDS OF OCR FOR ANYDOC®

At A Glance

REDI-MAIL DIRECT MARKETING

Industry

Direct Marketing

Challenge

Redi-Mail needed a fast, accurate, and cost-effective solution to process incoming customer loyalty and rebate requests, comprised of an assortment of document sizes. Their existing manual process relied on manual data entry and made it difficult to track volume or work in progress, hindering Redi-Mail's ability to efficiently allocate the workload.

Solution

OCR for AnyDoc® eliminated the time-consuming and expensive manual data entry previously required to capture critical customer information. Productivity increased, enabling Redi-Mail to exceed customer expectations, and avoid escalating costs.

Results

- Average daily backlog dropped by 20%
- Fulfillment time cut by two weeks
- Processing speed increased by 30% without adding staff

The Future

Pleased with the results of the automated solution, Redi-Mail's goal is to automate the processing of 100% of their client's fulfillment programs.

Redi-Mail Direct Marketing is a leading, national provider of marketing support solutions, including the fulfillment of customer loyalty and rebate programs for their multitude of clients. The company's extensive in-house capabilities enables them to provide clients with direct marketing services that include: lists, multi-channel marketing campaign management, direct mail, website development and hosting, database management, and literature, premium, and pharmaceutical sample fulfillment.

Headquartered in Fairfield, New Jersey, Redi-Mail Direct Marketing occupies space greater than three football fields of secure state-of-the-art data management, lettershop, fulfillment, and production facilities that support hand and automated production over two full-time shifts. Each week, an excess of five million pieces of mail are processed through Redi-Mail's facilities.

Challenge

Redi-Mail fulfills a variety of customer requests for loyalty, rebate, and free sample programs for many clients across various industries. At any given time, ten to fifteen different campaigns may be running simultaneously, generating anywhere from 1,500 to 3,000 customer request documents per day. An existing manual system made it difficult to determine document backlog, as well as adequately capture and project man-hours on a particular project. This made capacity planning difficult, impacting Redi-Mail's ability to accurately predict project scalability on existing or new programs.

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Redi-Mail was also dependent on operators manually hand-keying 100% of the information from the incoming paper documents. With a variety of projects being processed simultaneously, it was a challenge to physically manage the stacks of different forms, receipts, proofs of purchase, and more that could accompany each request, depending on a client's unique fulfillment requirements.

Solution

Initially, Redi-Mail was interested in a more transparent method to track the status of the incoming customer fulfillment projects as they were processed. Their first idea was to simply digitize the incoming documents, which ranged in size and content from hand-printed forms, to box tops and receipts. However, after learning more about the capabilities of optical character recognition (OCR) technology, they realized that a more robust solution that would also eliminate manual data entry and increase overall process speed was available.

Chetan Yavasani, Director of Technology Services at Redi-Mail, was familiar with OCR technology and invited AnyDoc Software value-added reseller, CPT Intelligent Technologies (CPT), to provide a demonstration of a complete scanning and data capture solution. He was immediately interested in the OPEX AS3690i™ scanner with mail opening capabilities and AnyDoc Software's automated data capture solution, OCR for AnyDoc®, after seeing a simple, but powerful demonstration.

Yavasani recalled: "We process many different types of forms, some of which are not well-suited for electronic data capture technology. We were very interested in evaluating this solution against that constraint. We did not provide CPT with any sample documents prior to the demonstration; yet, they were able to set up a job. When we looked at the amount of data that could be collected from the scanned image, we were impressed." He continued, "the ease of set-up and the accuracy of the data captured were two of the biggest advantages of OCR for AnyDoc."

Today, each client is assigned a separate PO Box. An operator simply feeds the unopened, incoming mail into the scanner feeding tray. The machine opens the mail, the contents are retrieved (which could be any combination of documents ranging from forms, receipts, and more) and placed in the scanner, without any required presorting. The OPEX scanner also creates a batch number and transaction number. This information, along with the document images, is then imported by OCR for AnyDoc, where the data is automatically captured and validated, according to a client's specific business rules. The accurate data is then quickly output and converted into the appropriate format, depending on the client's specifications. In the case of a rebate program, the client's customers can log into the database to review their current loyalty status.

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Unlike the OPEX/AnyDoc solution provided by CPT, some scanners are not compatible with different sizes documents, such as box tops, and they can frequently get stuck or misaligned. And not all software solutions are able to correct for any skewed or misaligned images that may occur during the scanning. In addition, for example, when a batch of 100 documents is processed, if the scanner did get stuck, some solutions are unable to identify the document with the issue. Instead, in this case, the entire batch would need to be re-scanned.

To alleviate these processing pains, OCR for AnyDoc incorporates a robust Quality Assure (QA) phase. Because consumers send documents to Redi-Mail's facility in a variety of conditions, it is important to optimize the document images to get the strongest data recognition results possible. Leveraging decades of experience, OCR for AnyDoc deskews, lightens, crops, despeckles, and rotates the images as necessary. The QA phase also enables Redi-Mail to replace (by re-scanning) a poor quality image, insert new images into the group, or append images to the end of a scanned group without re-scanning the entire batch.



"The ease of setting up a job and the accuracy of the data captured were two of the biggest advantages of OCR for AnyDoc."

– Chetan Yavasani, Director of Technology Services, Redi-Mail

Customer Profile

Redi-Mail Direct Marketing

Redi-Mail manages hundreds of unique rebate programs for many Fortune 500 companies. Their proven experience in the professional management of these rebate, loyalty, and specialty programs allows organizations to increase sales and build market share while providing an opportunity to collect valuable customer data.

To learn more about Redi-Mail, visit www.redimail.com

With the cleanest, most accurate image available, OCR for AnyDoc then captures the data automatically, eliminating the need for manual entry. Using the software's drop-down menus and straightforward graphical user interface (GUI), Redi-Mail can easily apply customized business rules for each client to validate the captured data.

Results

Today, the customers of Redi-Mail's clients are happy to receive their loyalty rebates up to 40% faster. With the automation provided by the OPEX scanner and OCR for AnyDoc, Redi-Mail has been able to slash two weeks from their average project cycle time. And daily backlog has dropped by 20%. Now as soon as documents are received, a digital image is created and imported into OCR for AnyDoc for automated data capture.

"...with the flexibility of OCR for AnyDoc we don't need to add any additional staff..."

Redi-Mail has also been able to more efficiently meet the needs of their clients. "Even during periods of peak volume, with the flexibility of OCR for AnyDoc we don't need to add any additional staff. This automated solution has allowed us to increase productivity and more efficiently manage our clients' campaigns," said Yavasani.

Partner Profile

CPT Intelligent Technologies, Inc.

CPT Intelligent Technologies, Inc. is a systems 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

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Complete Line of Products

Since 1989, AnyDoc Software has met the document, 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 payers—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.