BOWNE

Documents on Demand Case Study

Enterprise Solutions

→ Retirement Plan Provider

Digital, Web-based management of entire document workflow injects speed, flexibility, cost-efficiency into production of retirement plan kits

THE CLIENT

The client is a retirement plan provider with more than $50 billion in assets under management. In support of the 2,000 plans it manages, it produces more than 50,000 enrollment kits each year.

THE CHALLENGE

The plan provider produced its enrollment kits in the traditional manner: Various components were printed in bulk and stored on shelves until they were retrieved, collated by hand and placed into presentation folders for delivery. With every human touch there was a cost involved, as well as the potential for error. And as plan information became outdated, these "spoiled" inventories were discarded and the cycle began again.

The client wanted a faster, more efficient way to assemble and deliver its communications to its clients. It believed it should be possible to build documents on-line and print them as they were needed – print on-demand, in other words – to cut costs associated with bulk printing and manual fulfillment.

THE SOLUTION

Bowne Enterprise Solutions provided an integrated document creation, production and distribution solution. The core component – BES' Web-based Documents on Demand solution – combines a centralized repository with a Web interface for on-line and real-time document customization, dynamic document assembly logic and print on-demand technology.

The solution allows the client to work within a document template that it defines and creates. Users are able to customize content and graphics on-line and compose and view real-time PDF proofs. Then, when the document is approved, according to the client's automated workflow, it is available to be printed on demand at Bowne's state-of-the-art digital printing and fulfillment facilities. Orders are printed and shipped within 24 to 48 hours.

THE BENEFITS

The client's new, streamlined document creation and management process:

→ Saves the client approximately $10 per book in total creation, production and distribution costs

→ Facilitates quick, accurate changes and updates to content

→ Allows content to be stored in a centralized electronic repository with access control and security

CASE STUDY

→ Reduces time to create content from days to hours

→ Ensures kit integrity

→ Lowers warehousing costs

→ Eliminates manual fulfillment costs

→ Eliminates document obsolescence

In addition, the client's enrollment kit itself has become more manageable and user-friendly. What once consisted of 20 separate pieces is now contained in two perfect-bound booklets and comes in a folder designed to be an organizer for the individual investor's plan information and subsequent statements.

Planned additions to the on-line environment include client service reports, multi-language enrollment kits, plan maintenance documents, and marketing documents and tools are all planned additions to the new on-line environment.

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