



DIGITAL MAILROOM
SOLUTIONS

Restore
Digital

Restore provides complete solutions for clients looking to effectively and efficiently manage their documents and data. This can be achieved either on-site at your place of work or off-site at one of our dedicated UK bureaus.

This document provides an overview of our digital mailroom solutions including the business benefits, our processes and our experience in delivering these solutions.

Our solutions and support also include:

- Invoice Processing
- Expense Processing
- HR Solutions
- Claims Processing
- Hosting and Back Scanning

Our tailored solutions mean we can slot into your existing infrastructure or our workflow consultants can come into your organisation and work out from scratch the most efficient process for turning your documents into digital data.

Our Customers

We work with clients in the public and private sectors helping to develop appropriate and reliable records management solutions. We work with customers who are diverse in both size and sector including XL Catlin, QBE, Virgin Atlantic, Zurich as well many local authorities and NHS Trusts. These organisations have greatly benefited from improved processes and have achieved a return on investment in under a year.

Our Approach

Our approach is to offer clients a risk free strategy, with agile project management at its heart that delivers a rapid return on investment. We supply a range of solutions which are tailored to resolve specific challenges faced by different operating systems. We have access to the 'best in class' process automation technology and software, and our solutions are designed to inter-operate with your existing software and data. Each solution is easily tailored to suit your specific needs.

Our Experience

The team have been scanning, storing and managing critically important documents for well over 15 years. We're well known in our industry for our expertise, outstanding customer service and extremely high attention to detail.

Our team have years of experience handling sensitive, business-critical information for both large and small organisations across the UK and worldwide. Often these documents are the only copies in existence, so it's crucial we ensure protection and compliance at every level.



Put yo
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on aut

A photograph of a woman with long blonde hair, wearing a purple dress, looking down at a stack of papers she is holding. In the background, several people are working at desks in an office setting.

our
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opilot.

Restore's mailroom automation solutions allow you to capture, route and process important information as soon as it enters your business by merging multiple channels into a single traceable information handling process.

Mailroom automation turns your complex inbound document sorting and distribution processes into high-performance, automated workflows. Even the huge volumes of paper and electronic information received by large corporations and can be managed through a single mailroom automation platform.

Making sure not a single document goes missing.

Regardless of the number of incoming information channels your mailrooms accommodate each day, mailroom automation can single-handedly manage your entire document inflow.

The foundation of our digital mailroom system is highly accurate scanning technology, which quickly captures the information on your documents, classifies the document type, and then forwards the information (and the document) automatically for immediate entry into the right business process.

The technology can be applied across multiple locations to aggregate information received organisation-wide, enforcing a consistent and reliable methodology to business-critical document dissemination.

A large proportion of incoming business communication remains in paper. It is slow, inefficient and cumbersome to process. By moving to a Digital Mailroom service your business will be freed from the constraints of traditional document handling and will save on cost and gain huge efficiencies.

**We identify the risk
of non-compliance
and establish the
biggest or quickest
wins from process
automation.**



Benefits to your mailroom

- Standard mail items, which usually make up the bulk of the processed mail, are handled very quickly with virtually no human intervention and at a minimal cost.
- Exceptions are identified quicker, meaning more time can be devoted to resolution.
- Risk of errors is minimised as the process is automated.

Benefits to business managers

- Mail can be prioritised automatically and accessed from anywhere quickly so that business critical correspondence can be dealt with as soon as it arrives.
- Reduces the risk of important and confidential mail being misplaced and helps your company to comply with data protection laws and corporate governance and legislation.
- Improves levels of customer service by speeding up response times and reducing complaints.
- Allows you to balance workloads instantly between remote staff and subcontractors even if they are based out of the office and in other countries, as mail items are processed and accessible online.
- In a single supplier, we can advise you on your mailroom processes, staffing and technology improvement options to ensure they operate in the most efficient way.

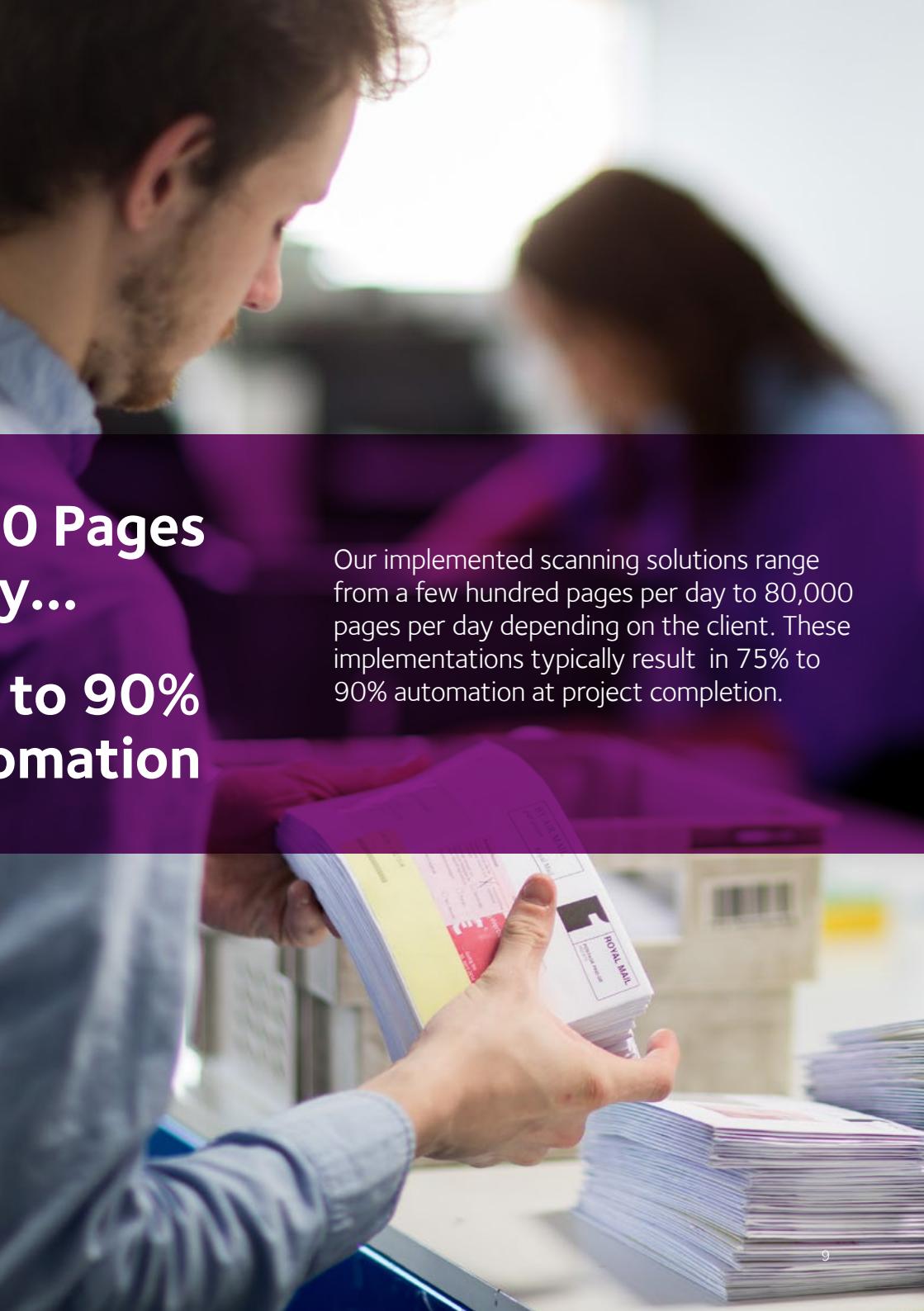
Benefits to your company's finances

- Reduces staff and overhead costs and allows you to implement pay on demand or centralised service charges which are only paid for as they are used.
- Keeps in-house systems and processes tightly controlled but also gives the flexibility to accommodate expansion via fully integrated outsourced services.

80,000
per day

...75%
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0 Pages
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to 90%
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A close-up photograph of a man with dark hair and a beard, wearing a light blue button-down shirt. He is looking down at a stack of papers he is holding. In his right hand, he holds a white Royal Mail envelope. In his left hand, he holds a stack of yellow and white documents. The background is blurred, showing other people and stacks of papers, suggesting a busy office environment.

Our implemented scanning solutions range from a few hundred pages per day to 80,000 pages per day depending on the client. These implementations typically result in 75% to 90% automation at project completion.

Here's how mailroom automation works.

Inbound document processing benefits both your organisation and your customers. Instead of devoting valuable worker time to reviewing incoming forms, contracts and other documents to route them to the appropriate destination, implement document recognition and routing technology to reduce labour costs and deliver better results, faster.

1. Scanning and classifying

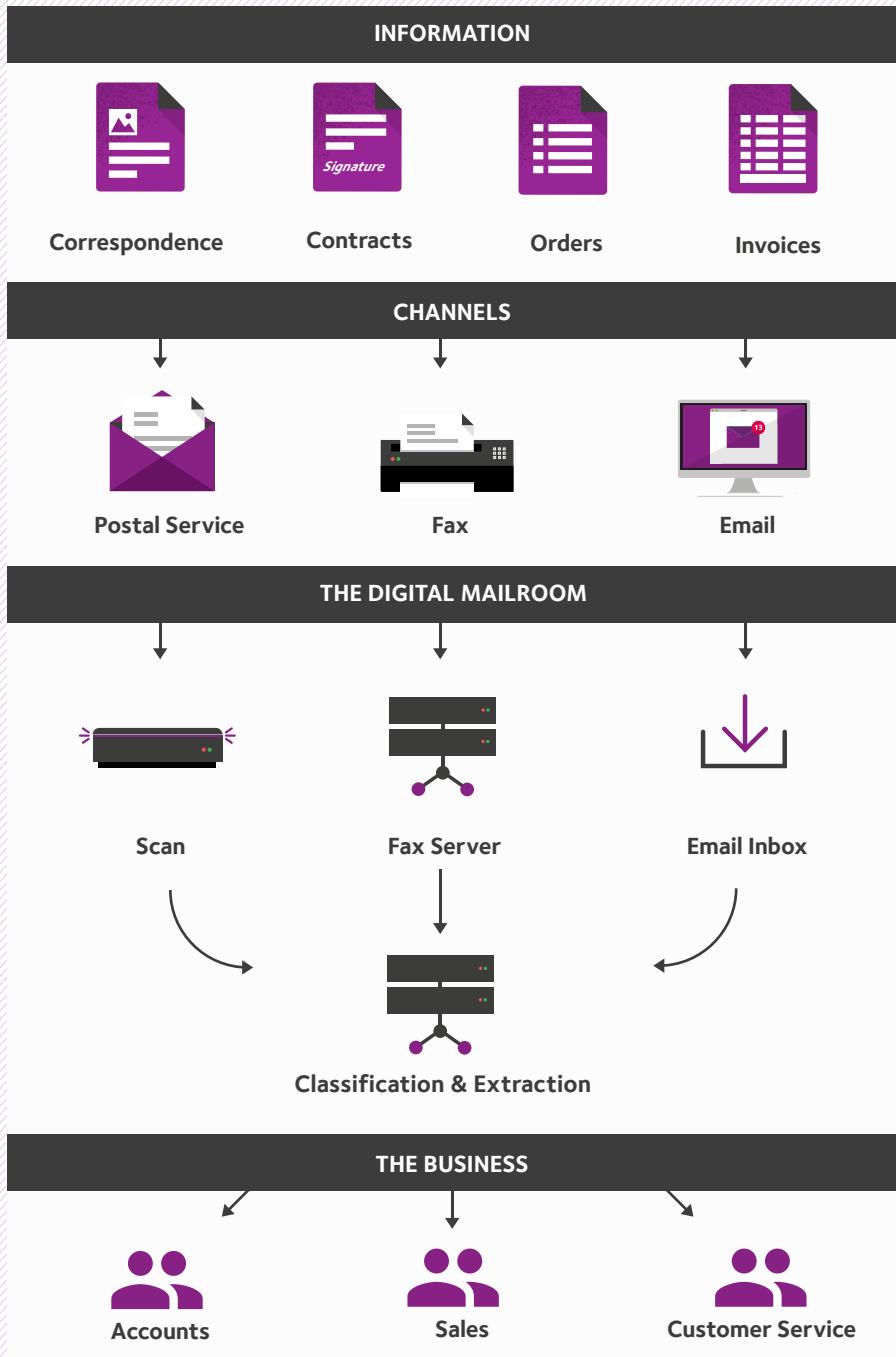
- All types of documents, from forms to letters, are scanned at any number of mailrooms for instant arrival at a centralised processing point.
- Document recognition technology analysis the documents, looks for keywords and determines the document classification

2. Data capture and validation

- Relevant document fields are captured, and the data is validated according to master data or a set of pre-determined rules
- Missing or inaccurate information is flagged for user verification

3. Entry into business process

- Digitised documents are directed to a target person or group via a workflow
- Relevant data from documents is incorporated into existing systems





This is how other companies have used our mailroom automation services.

Case Studies

Financial Service Authority (FSA)

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Stoke on Trent City Council (SoTCC)

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Financial Services Authority (FSA) Case Study

Financial Service Authority implements digital mailroom for handling inbound documentation for 1 million live and 500,000 new cases per year.

The introduction of electronic filing and the digital mailroom.

The client had identified that continuing to work with paper based case files would not be sufficient to handle the future growth in volumes of incoming cases and associated paper and electronic documents.

This together with challenges presented with the increase in remote working and possible restrictions in access to the office during the London 2012 Olympics led them to embark on a project to introduce an electronic filing (e-file) system to supplement their existing case management system.

Key to the success of the e-file system would be the implementation of a digital mailroom facility that could accurately determine document type and file the documents against the correct case in the e-file system. Furthermore the system had to replace a paper filing system that included all inbound and outbound documents, including printed copies of e-mails.

Highlights:

- 30 million sheets of paper scanned in first year and converted to PDF
- 5 million emails converted to PDF and filed
- 10 million images in live case files back-scanned as part of implementation
- 25% reduction in physical post
- Document classification to automatically identify document type
- Automated extraction to determine an existing case file to populate or to set up a new case
- Automated extraction of data from structured and non-structured documents; used to prioritise tasks and cases in workflow
- Integration with in-house case management and e-file system
- Accurate and auditable processing for highly confidential files
- Records management system to track individual documents, packages and boxes through both internal and external archives
- Complete design and build of in-house inbound document processing solution.

The Model Office.

Restore was engaged at an early stage to provide consultancy services to form part of a model office team that would investigate options for e-file and digital mailroom and to present these options to key business areas.

This enabled the project team to show their users how the new paperless way of working might look; which was an essential part of winning over a number of sceptical users who could not initially imagine life without paper case files. Through model office testing, all major objections were handled and the project was able to progress with full sponsorship across all departments.

At this stage the client was also able to determine the exact range of products that would form part of the solution through trials and analysis of multiple products and alternatives, including scanning hardware, capture software and image repository. This was done through a combination of product evaluation against pre-defined criteria, requirements analysis and requests for information to suppliers and manufacturers.

Design of the Digital Mailroom.

On completion of the model office testing and the selection of the product suite to be used, Restore was engaged to analyse the existing workflow for hard copy documentation and design the inbound digital mailroom.

This went far beyond the configuration of the capture software and extended to looking at the entire process from post arrival through to long term archiving. Restore's own tracking system, MiTracker, was chosen to manage the tracking of boxes, packages and documents whilst in the system and to provide reporting on the entire process including time spent on each process and the volumes of work in the system. Restore also assisted in the design of the physical inbound mail handling and scanning facility in order to ensure the process ran efficiently.

Key success factors.

With the Olympics and the need for flexible working fast approaching the pressure was on to get the e-file and digital mailroom function up and running so as to ensure business continuity throughout. Restore's experts fully integrated with the client's teams to implement the solution and ensured all staff were trained and ready for switch on day.

Key to the success of the digital mailroom was the need to scan live case files so that inbound items could be viewed on screen along with images of the paper based case files that arrived prior to the transition. This amounted to 10 million images and was conducted in a six week period prior to switch on.

The Result.

Solutions were put in place for electronic submission of documents from key businesses and the automated filing of these into PDF format in the e-file.

The electronic submission project resulted in a reduction of around 25% in the amount of physical post being handled within the mailroom.

All case management is now performed against the e-file system. The solution is able to track any document at any time right down to which box it is in, on which shelf whether archived internally or externally. Full reporting and auditing of the process is available at any time through dashboard reports.

The client is now a paperless organisation.

Operating efficiently and realising significant time and cost savings. Over 80,000 sheets of paper are scanned, along with over 20,000 emails and 40,000 images electronically transferred every working day. There was zero down time during the Olympic period; the client has been able to handle the project throughout and has subsequently experienced significant growth in new cases without the need for a major increase in staffing that would have previously been required.



Public Sector Project Of The Year

Restore Digital - Digital Mailroom

Restore work across a wide range of industry sectors, but have particular expertise in the public sector, healthcare, pensions, insurance, legal and membership services.

Introduction.

Restore provides a range of solutions for businesses in order to help them generate improved efficiencies and cost savings when managing their documents and data. Services are delivered to clients both on-site at a client's premises, or off-site at one of Restore's bureaus. Services provided by Restore include:

- Document scanning
- Workflow management solutions
- Data management solutions
- Online hosting services
- Support services

Stoke on Trent City Council (SoTCC)

Case Study

The Problem.

Stoke on Trent City Council (SoTCC) was moving to new premises and as part of its ‘paper lite’ policy, the council wanted to create a digital mailroom to handle all incoming correspondence, which would forward documents electronically to the correct team for processing.

The council also wished to implement a hot desk policy, with staff using different workstations as needed. To do this, SoTCC needed its mail to be delivered to the correct team in an electronic format.

The Solution.

Restore worked closely with SoTCC to define a process which would fulfill SoTCC’s objectives. Using its wide operational knowledge of mailroom automation, Restore designed the solution to include processes capable of handling regular, sensitive and managers’ post.

Installing two OPEX scanners at a centralised location greatly increased efficiencies in opening and scanning the incoming post. The output from the two scanners was then consolidated and imported in to Kofax, for classification of the documents to take place. Using complex algorithms, Kofax classified the document against its sample set and if confident, the document type would be matched against a mapping table to determine the SoTCC Line of Business Team to route the document. If the document type could not be automatically identified then it would be sent to an Operator to validate.

The Result and Business Benefits.

The digital mailroom, implemented by Restore, has resulted in a number of business benefits for SoTCC.

With the support of Restore, SoTCC has successfully moved offices and implemented a consolidated digital mailroom, allowing for automatic routing of electronic correspondence to the correct Team. This transition to the digital mailroom has also resulted in:

- **Improved Efficiencies in Handling and Response Time** – The digital mailroom was able to sort and deliver mail in a much faster time than a human processor, allowing it to be read and replied to more quickly. This means that issues and enquiries are dealt with immediately.
- **Reduced Mail Handling Costs** – As well as making the distribution of mail much faster, the council is able to save cost efficiencies on staff time, postage and other overheads such as copying and storage. This allows the money to be used on other areas of the council requiring investment.
- **Prioritising Mail** – With a digital mailroom, everything is now sorted and prioritised in one place so that the important messages come through over the irrelevant ones.
- **Channel Communications** – With messages coming in from a number of different places, it has been beneficial to have a digital mailroom that can channel all emails, post and other messages into one place, helping prevent anything being missed or forgotten.
- **Effective Information Sharing** – Information is now processed and distributed instantly where required. This allows every employee in the council to be fully up to date with any messages in order to advise a customer or supplier.
- **Reduced Paper, fulfilling its paper-lite strategy** – The digital mailroom reduces the amount of paper used, which also helps avoid messages being lost and minimises the requirement for storage space and shredding.
- **Improved Management and Process Information** – The digital mailroom allows all of the information which runs through the system to be collected and displayed in a way that can be analysed through simple dashboards.

“The project to date has been a great success. Working in close partnership with Restore, we were able to achieve our objectives in a short period of time.

Pre-project, the delivery process used to take three people all day to deliver our post. Now two people do it in just half a day.

Staff across the council will no longer have to manually open, date stamp and scan in their post as this is now being undertaken by a central facility. This allows employees to add greater value to the work undertaken supporting our residents.

Once the project is complete, we will be scanning in approximately 10,000 items of post per week.”

Helen Dos Santos,

Corporate Business Administration Manager
Stoke on Trent City Council

“Our Digital Mailroom solution encompasses a series of services, designed to eliminate the handling of inbound paper. By working with the SoTCC we helped digitise all inbound communication for our clients, and with the intelligent use of the right technologies we implemented the track, identification, categorisation and capture of the received information.”

Adrian Steventon,

Professional Services Manager, Restore



Digital

At Restore, we abide by strict UK data regulations and hold the following accreditations for document and data handling:

- Data Protection Act 1998
- NHS Information Governance Toolkit Level 2
- ISO 27001 Information Security Management
- Records Management Standard 2.2 (Public Records Office)
- BS EN 15713:2009 Secure Destruction
- BS EN ISO 9001 Quality Standard
- ISO 27001 Environmental Management

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