

Application Study: Financial Services

Solutions: WebCRD™, WebCRD Dynamics™, QDirect Dynamics



Sun Life leverages technology to generate huge savings

The key is promoting capabilities early and clearly.

"WebCRD enables us to produce print jobs much more easily for clients, making their life easier through online ordering, saving them time and money and increasing their confidence in using our print center for more of their jobs."

Craig Allen,
Print Services Senior Application Specialist, Sun Life Financial



Michael McKillop and Cornelius Chappell

Challenges

- Streamline the ordering process for customers and the printing process for production
- Create a platform to support both a digital catalog and variable data documents
- Reduce manual touches in the Print Center to increase speed and efficiency.

Solution

- WebCRD PRO with QDirect
- WebCRD Dynamics, QDirect Dynamics
- WebCRD AutoStock™ finished goods inventory management module

Results

- Save ½ of a headcount/year by reduced touches and automated chargebacks
- Time savings for sales customers equals 5.6 reps/year
- Cut business card printing costs 60% and turnaround by 86%
- Reposition Print Center as an essential service.

Customer Background/Solutions Overview

Sun Life is a leading financial services company providing financial planning, life insurance, health insurance, investments and more to over 37 million people. The company's U.S. Administrative Services division is a multi-national team of over 80 employees managing the flow of documents that support back-end operations and front-line sales. Since 2005, they've saved Sun Life millions by strategically leveraging technology.

Sun Life's Print Center operations are run by four people in Kansas City, MO, three in Windsor, CT, and seven in Wellesley, MA. These three Print Centers serve all departments in the organization, including Sales, Distribution, Marketing, Enrollment, Billing, Accounting, Claims, International and Human Resources. The documents they create include, enrollment kits, proposals, marketing materials, bills, claim letters, business cards, personalized stationery, contract booklets, reports, presentations, business mail and more.

Sun Life first turned to RSA in 2012 to reduce manual touches in the Print Center in order to increase speed and efficiency, create a platform to support both a digital catalog and variable data documents and streamline the ordering process for customers and the printing process for production.

"Our larger goal is to be an agile department that can quickly flex to meet the needs of our business. We envision the print shop being a place people come to for solutions, not just printing," says Craig Allen, Print Services Senior Application Specialist, Sun Life Financial.

The solution started with eliminating manual entry and adding accountability

Sun Life used to have an email based workflow. When emails arrived, jobs had to be entered manually with time consuming call backs to clarify the customers' needs. The job orders themselves weren't clear, the shipping wasn't clear and the cost center wasn't clear. Even worse, emails were occasionally lost. Sun Life didn't have a server to support Web to print, hosting a catalog or customizable variable data print items, and they had no method of tracking the orders that came through. Chargebacks were a laborious process involving manual typing and math that took 40 hours per month.

With more than 1.8 million clicks per month in 2012, and so much manual process, Sun Life knew they needed to find a better system.

They started with the basics and then built on their system

Sun Life has used a phased in approach over the last four years to give their customers and operators the advantages they need, and Sun Life continues to plan for improvements:

- Started with WebCRD Enterprise, which includes QDirect in 2012 at multiple sites with multiple rate cards
- Added WebCRD Dynamics in early 2013 to produce variable data applications such as business cards and custom contact sheets
- Added CentralPDF™ in September of 2013
- Added AutoStock in October of 2013
- Added the Book Assembly module in 2013
- Added QDirect Dynamics in July of 2014 and then RSA developed a custom Sun Life script
- Upgrading to latest release later this year to leverage new automation and tracking features.

"We chose WebCRD because it had the best balance of being user-friendly with a great production side, as well," explains Lance McGinnis, Director Administrative Services. "RSA was really good to work with, and the competitors who had similar capabilities charged two to three times more for the same functionality."

The Print Center gets as much from WebCRD as their customers do

Sun Life has found that WebCRD Dynamics enables them to do more than ever before. They use it for hosting variable data solutions in WebCRD to produce business cards, stationery, proposals, contact flyers and more. In fact, when they wanted to automate a variable letter workflow that was manual and wasteful, RSA developed a custom QDirect Dynamics script to automate that workflow. Now the user uploads a CSV file that the software runs through a variable template, and the software automatically composes the document and emails the user a PDF that is never printed.

Workflow

With WebCRD's pre-production module, all jobs have driver setup automated, and WebCRD spools them directly to the printer with the correct settings. After the upgrade to the latest version of WebCRD, Sun Life will be able to take advantage of additional automation opportunities including operator assignment, new AutoFlow™ rules to send jobs to specific sites and additional information that can be tracked for reporting and action.

"Print Services has helped with complex variable data projects in many different areas of the business. We have gotten exposure that was not possible before. More departments are using us for their workflows, in ways they did not before."

Lance McGinnis,
Director, Administrative Services
Sun Life Financial

Print Center Stats

Employees:	14
Customer Sites:	3 regional offices
WebCRD jobs/ year:	4,400
WebCRD impressions/year:	9 Million
Annual Charge- backs:	\$1.75 Million

Winning sales proposals is where it all comes together

Before WebCRD, every Sun Life sales office was producing sales proposals differently and often not using their Print Center. The Print Center has now developed a proposal builder tool using WebCRD Dynamics that standardizes proposals for large accounts. The rep uploads the rates and marketing materials, and the software provides a consistent look and feel for the proposal. The proposal builder has executive commitment and the support of sales, marketing and other functional areas. The Print Center has provided extensive training on how to use it, and it's had many customized builds using a common template. The sales force now hits the market with a consistent look and feel to represent the Sun Life Financial brand well.



The value to Sun Life is proved in the numbers

- **Reducing touches.** By reducing touches for print driver setup and customer communication, they've reduced turnaround time by 15 minutes per job, equalling ½ a headcount per year.
- **Improving chargebacks.** Orders can now be easily tracked so the customer is held accountable to what they ordered. Unit costs are now even lower and the automated chargeback process saves the print center 40 hours every month.
- **Enabling Sales.** Fifty-two percent of orders support sales or enrollment actions. This work previously fell on field office sales and enrollment reps. Tools the print center has created have provided the equivalent of 5.6 sales reps.
- **Enabling Efficiencies.** Provides more detailed management reports for spend analysis, improves device utilization via automated workflows, and reduces errors, improves tracking and simplifies the user experience.
- **Shift from backroom to front-and-center operation.** By increasing the visibility of Print Services, the department has become a part of the sales process- involved prior to the Sun Life sale rather than as a last rushed step. Sun Life's Print Services has garnered critical executive support that positions the print shop as an essential service that the firm cannot go without. McGinnis sums up, "Other business units will hear how well a solution worked for another business unit. They may have a similar need and will engage us. We have conditioned them to come to us for print help."

What's Ahead

Sun Life recently acquired Assurant Employee Benefits from Assurant, Inc., and they look forward to extending the benefits of Web to print to all areas of the new organization. Existing Print Center staff have provided WebCRD production training to staff at the new location, and plans are in place to utilize WebCRD's AutoStock module for finished goods in the warehouse asset acquired in the merger. Because continual improvement is a way of life at Sun Life, the team is also planning additional workflow optimization, enhancements to the executive dashboard and automating additional management reporting.



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