

Smart document flow at UPC Austria

The multimedia provider UPC Austria reorganized its document-related processes following the takeover of Inode. The solution created with the help of the Viennese software

and consulting company Qualysoft (INFINICA) was recognized with the ECM Award 2010 in the category "economic efficiency".



UPC Austria is one of the biggest multimedia providers in Austria. The company headquartered in Vienna offers its customers a wide variety of high-end products in the field of triple play – TV, Internet, telephony. The Internet and telephony provider Inode was taken over in 2006. This added approximately 120,000 new customers and new DSL offers to the existing customer base. Documents play a particularly important role in the communication with more than 700,000 customers overall, especially in sales and marketing. Approx. 2,600 documents are created daily, and between 40,000 and 90,000 additional documents are electronically signed four times a month. In addition to the large number of documents, the variety is also very extensive with 200 different document types.

Mag. Manfred Steinbichl, CIO of UPC, wanted to create a flexible, easily scalable solution for the creation and the output of business documents. Before that, documents had been created in a transactional manner via data from the back-end systems; while those are optimized for the dynamic data collection, processing, and archiving, they exhibit limitations in functions for business documents. Because of that, the IT team had to develop the desired formatting logics and output rules in the past. It was challenging to access the various output channels. This often had to be programmed individually..

"Our special challenge was to reproduce the acquisition in the processes and the document creation in the shortest time," **Mag. Manfred Steinbichl, CIO of UPC Austria**, explains.

The desire of UPC Austria was to create individual documents accompanying the business processes for each customer. As UPC offers very many product combinations and special additional services, the goal was to give customer care agents the opportunity to make a customized offer to each customer which fulfills his/her communication needs.

■ About UPC Austria



UPC, a leading provider of broadband Internet, TV, and phone services in Austria, is a consolidated subsidiary of Liberty Global, Inc., and part of the UPC Broadband division.

Approx. 90% of all Austrian households and companies (as of 12/31/2010) are located within the service area of UPC (via own cable network infrastructure, unbundled services, or other DSL services). Based on the key operational indicators as of 12/31/2010, UPC supplies 706,000 customers in Austria with 1,292,000 services; these include 527,000 TV customers, 440,000 broadband Internet customers, and 325,000 landline phone customers. 1,100 employees work for UPC in Austria. The basis of the corporate vision is that this amazing, but often complex digital world should be accessible for everyone. The European employees of UPC Broadband strive to make this happen by bringing simplicity and the human touch to everything they do.

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For example, young and technology-oriented customers in the cable TV services business line want to receive quick and comprehensive information about the newest HD TV offers by email while a businessman is interested in information about business services and web hosting offers by postal mail. Challenges like these demonstrate the major impact different parameters and usage behaviors have on business documents and their components.

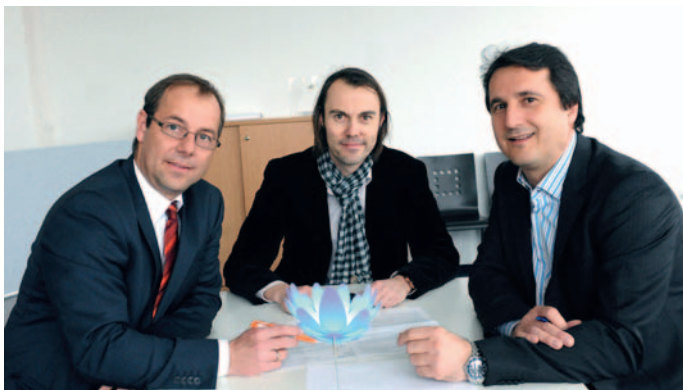
“We had to understand the existing procedures, integrate them in the UPC processes, and create corresponding templates within a few weeks.”

Mag. Manfred Steinbichl, CIO of UPC Austria.

The document creation was traditionally realized in a process with multiple stages: data from various back-end systems, but also input of the specialty departments and employees, affect the final document. Each application previously required different process definitions from the creation to the distribution and output of documents. And these also needed to be redefined for each change in the document and each change in the output format in the past. IT employees with proficiency in the respective applications and systems were needed to compile data from various sources in accordance with the requirements and the control of the data output.

Because of that, the objective set by UPC CIO Steinbichl was the homogeneous integration in the UPC application architecture. He was aiming at clear increases in efficiency with a process-oriented implementation and the broad automation of the document creation. The goal also was to achieve cost savings via a green IT approach and the reduction of printing in favor of electronic output channels.

UPC project manager Michael Kristek found an innovative solution for the automated personalized document creation and interactive electronic forms with the INFINICA Suite by the Viennese software and consulting company Qualysoft.



The project team from right to left: Mag. Manfred Steinbichl, Michael Kristek (both UPC Austria), and Dr. Herbert Liebl (Qualysoft Austria)

The intelligent software solution is based on open standards and combines document creation with output management in the form of a central server-based platform. UPC did not just perceive particular advantages for the document creation and distribution, but also the process optimization of the document-based communication due to the fact that the corresponding workflow for the link-up of the two disciplines could be controlled via a web-based interface.

The INFINICA solution was very quick to implement and easy to adapt to corporate processes. Document templates on the basis of XSL-FO (“Extensible Stylesheet Language – Formatting Objects”) are now being used instead of proprietary formats.

New intelligent document templates were created with a graphic Document Designer. Formatting, texts, images can very easily be arranged and modified that way – similar to the method in established word processing programs.

Text modules, images, tables, lists, barcodes, and logic modules are used at UPC. The particular strength of the Designer is access to external data fields that are referenced in XML format in documents. This does not just facilitate references to individual fields, but also their structural and logical connection in the form of dynamic references and rules.

As a result, business documents like invoices, forms, product information, letters, and mobile applications can be created with ease. This also applies to transpromotional documents that contain targeted product information in addition to the actual basic information and consequently create opportunities for “up and/or cross-selling” for the company.

The entire dynamic data is inserted by means of “drag & drop” into these templates without problems. The same applies to formatting content rules on the basis of dynamic data, e.g. marketing information.

Contents and data from the source systems can be integrated without problems via the workflow functionalities and the connections of INFINICA to the UPC application environment (customer relationship management, provisioning system, data archive). All processes that may be used to generate individual documents and convert them into a wide variety of output formats are defined on the INFINICA server.

Utilizing the new INFINICA solution, UPC call center employees (customer care agents) can now decide how to provide customers with documents in accordance with their desires. This is no longer just possible via normal postal mail at UPC, but of course also via emails and eportals (the customer may view contract details and invoice documents online, modify specific packages, and report the desired adjustments). SMS has also been an output channel since November 2010. The latter is particularly popular among young, technically affine customers.

Meanwhile, 200 different document types with complex rules are being created by means of the INFINICA solution at UPC Austria. The company generates several thousand documents every day. The most important document types include orders, offers, information letters, work orders, and contracts.

In addition to the actual creation of the documents, an essential requirement of UPC Austria is their distribution to the correct channels. These are currently being distributed to 44 output media, e.g. email, SMS, printer, FTP, and archive.

A significant advantage of the solution is the combination of "business process management" (BPM) and the strong elements from the world of "document composition" and "output management". Both the creation of documents and also the control and distribution to different output channels are now realized in a fully process and service-oriented manner. It was possible to achieve substantial increases in efficiency and associated cost reductions by means of these approaches in numerous areas.

■ Example document handling

Contract documents are a good example for this technical challenge. Contracts were created by means of a matrix printer (carbon copies) on continuous paper and generated from the existing CRM system at UPC more than 20 years ago. As the CRM systems were unable to fulfill these output requirements, it was a long path from this starting point to flexible documents that can be generated by means of reasonable tools in a quick and flexible manner directly on the screen.

In contrast, current contracts include updated campaigns, marketing messages, products, and special agreements. They can be adapted to changed corporate design requirements in a quick and flexible manner. General adjustments may be realized without numerous test printouts on paper. The quality of the created documents has also been considerably improved and uniformity in formats, style, and marketing messages has been ensured via the intelligent and flexible automation.



The implementation of the project was completed in a speedy manner with the server platform. Following the installation and configuration of the server components, the various document types were reproduced by means of the entire logic. The data is supplied via web service accesses on the intranet platform.

Michael Kristek, IT deployment manager UPC Austria, project manager: "A modern and flexible system is responsible for the document creation and the output management now. This makes it considerably easier to adapt to changing processes and the administrative underlying IT components. The entire flow has become noticeably more transparent with the introduction of the INFINICA solution."

■ The central INFINICA solution brought the following advantages for UPC:

- Reusability of document templates and modules
- Efficient implementation of new document requirements
- Central monitoring of the document generation
- Significant increase of digitally provided documents (email, SMS, portal)
- Easier response to corporate identity/corporate design changes

Now the processing times from the idea in the specialty departments to the IT realization have become shorter many times over. An extended set of tools for the creative realization is available at the same time. The flexible combination of print, email, SMS, and other electronic channels facilitates prompt and customer-oriented information.

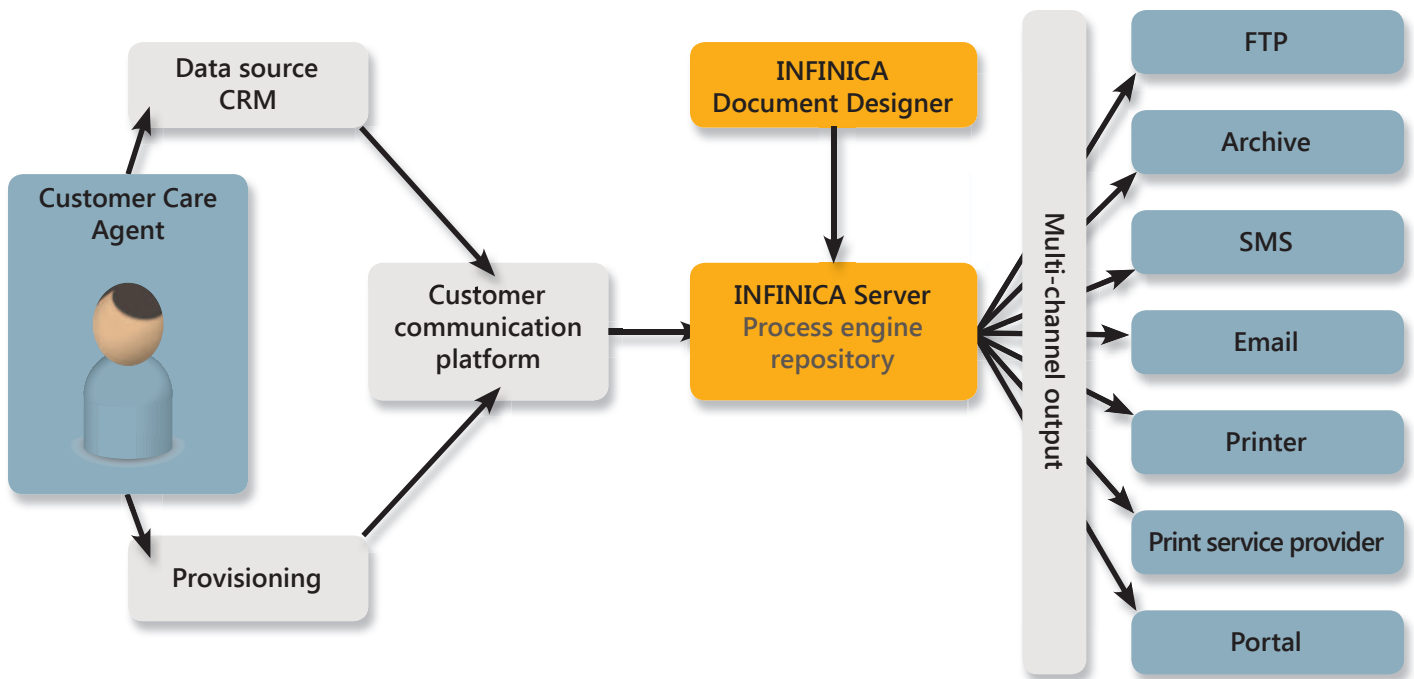
The INFINICA implementation at UPC was recognized with the **ECM Award 2010 in the category "economic efficiency"** by the consulting company PENTADOC and the IT trade journal Computerwelt. This is the first time that a document composition solution received this coveted prize.

"We are proud of the award because it confirms that we offer ideal software solutions for an issue that is vital for the future," Dr. Herbert Liebl, managing director Qualysoft Austria, says. "This award was bestowed on a project executed with great commitment that may serve as guide for numerous new document composition projects."

Dr. Herbert Liebl and the CIO of UPC Austria, Mag. Manfred Steinbichl, are pleased with the received award.

UPC sees additional potential for improvement in the outsourcing of simple document adaptations to the specialty departments in the medium term. This aims to reduce the "time to market" further.

UPC also wants to expand its portal solutions. As a result, customers can simply select from various options and communicate in the manner they prefer with UPC. The customer care agents have identical copies of the documents that the customers received on their screens and are consequently able to process customer inquiries with even more speed and efficiency.



Document templates are designed in the INFINICA Document Designer and contain references to fields of the data sources, logic elements (formatting and content logic), image references, and dynamic tables. The data is forwarded from the internal systems of UPC, e.g. the provisioning and CRM

system, to the central customer communication platform. After the data has been consolidated and cleansed in this application, a web service is accessed for the document creation at the INFINICA server. The INFINICA server receives the query and forwards it to the corresponding process.

Processes may be configured by means of INFINICA in an arbitrary manner. The INFINICA Document Designer now enables the IT department of UPC to quickly implement requirements of the specialty departments, even complex ones. UPC is using numerous different processes with various output channels. INFINICA facilitates their arbitrary combination. The associated rules are available in the process definitions. Internal monitoring mechanisms of INFINICA and the embedding in the monitoring components of UPC ensure the successful operation.

The reliability and performance of the INFINICA components convinced UPC. The open standards make it possible to very easily integrate new output channels like SMS to the advantage of UPC's customers. 15 individual servers were in use to operate the print spoolers before. Utilizing the INFINICA solution, one server hosts 44 printers as well as the FTP generation, the email transfer, and the SMS generation today. This greatly simplifies the operational expenses.

■ Advantages of the new solution and outlook:

Substantial economic benefits for UPC Austria are the increase in efficiency, the cost optimization, a noticeably higher level of flexibility, and improved customer communication. The following aspects contribute to this:

- High efficiency in the composition of document templates (the time required for the creation of a template was reduced from 2 days to 1 day on average).
- Template modules may be reused without problems.
- The response to corporate design changes was substantially simplified (via a noticeably reduced implementation time and considerably lower test expenses).

- A substantially higher percentage of information that is sent via email with document attachment ensures the sustainable economic provision (green IT) and massive cost savings.
- Approximately 25% more documents are sent via email than before. At a daily volume of 2,600 documents, this results in substantial cost savings for print, paper, and delivery.
- Eine raschere Zusendung von Rechnungen. Früher benötigte UPC durchschnittlich 4 Tage vom Zeitpunkt der Erstellung bis zum Empfang durch den Kunden. Heute werden die Dokumente serviceorientiert binnen weniger Minuten per E-Mail an Kunden geliefert.

It was possible to optimize the entire process of the document creation and particularly the document distribution a great deal. The implementation expense of the initial project was approx. 100 person days. Exhibiting a return on investment (ROI) of less than one year, the project has already become profitable for UPC Austria after a very short time.

"We are already looking forward to being able to use the new eForm software solution by INFINICA to improve the process optimization of the document-based communication even further," UPC project manager Michael Kristek explains. In the past UPC developed forms based on JavaScript. The document management is possible via a central transparent server platform with INFINICA.