

On a Journey to a Paperless Future

This global professional services firm has digital transformation well underway with a centralised scanning platform. On top of that, its print rooms run more smoothly. And it has more control over marketing print for less outlay.

CHALLENGE

Going paperless may be a dream for many, but this global professional services firm has it as a stated goal. It believed scanning was the place to start, with a centralised platform that could scale and adapt to meet the needs of different business units.

Plainly, no organisation can do away with paper in one fell swoop. There's plenty the firm still needs to print — in particular, client audit reports, which are its core business. But the report production process in the firm's print rooms was sluggish and complex. Avoiding errors in compilation and despatch took a great deal of effort.

For marketing print, the firm relied on several suppliers. It wanted more control over cost and process, and less management overhead.

SOLUTION

The firm turned to Xerox, its long-standing partner for Managed Print Services. At the firm's operations in Germany, Xerox rolled out new scanning, print room management and marketing print management services.

Today, the firm uses a scanning platform, managed by Xerox, to convert incoming paper documents to PDF. If any business unit wants to go beyond basics — with optical character recognition or data validation, for example — Xerox quickly adds the functionality to the platform.

In the firm's print room, Xerox installed new printers and print management software, and improved the audit report production workflow. It also provides technical management and advisory services.

And to help the firm optimise marketing print, Xerox provides consultancy, process standardisation and supplier management.

RESULTS

The Xerox services are delivering results all round: saving money, optimising processes, and helping the firm advance its digital transformation ambitions.

- Cost savings: 5% on print room and up to 25% on marketing print.
- Quicker access to document content through scanning and indexing.
- Faster, error-free audit report production.
- More scope for innovation in report production.
- Elimination of marketing print management overhead.
- Consultancy on best practices for marketing print.

A PROCESS THAT CAN'T GO WRONG

Client audit reports are at the heart of this professional service's firm's business. In Germany alone, it prints 25 million pages of audit reports every year. The reports are personalised and specific to each client, making any error in print or dispatch disastrous for the firm's reputation.

Yet the production process was riddled with risk. For starters, the pages signed by the auditor reach the print rooms separately to those which form the main body of the report, and must be inserted at the right places in the right report.

Xerox focused first on simplifying the workflow in the firm's print rooms in Germany. The legacy print software offered limited throughput, however, and the existing printers couldn't handle the report PDFs without an additional conversion stage.

To make things work more efficiently, Xerox installed new printers. Xerox print management software automates both the insertion of the signed pages into reports, and the labelling of report packages ready for dispatch. The whole process is much faster, and there's no longer any risk of errors creeping in.

Xerox keeps the print rooms running smoothly, providing technical management of all the devices and the IT infrastructure in the print rooms. In addition, Xerox virtualised the infrastructure to enhance backup and disaster recovery capability, and enable remote monitoring.

Now that the audit report production process is under control, the firm is ready to innovate. For example, it's looking at using colour to make the reports more eye-catching.

MORE SAVINGS, MORE CHOICE

The firm was concerned that marketing print costs could spiral out of control. By working with Xerox, it has made savings and brought budgets in check.

The firm no longer has to onboard or manage print suppliers. Instead, it has access to a large roster of suppliers selected and managed by Xerox, including specialists in output such as business cards and calendars. So there's much more scope to investigate new options and formats, shorten lead times and keep a tight rein on spend.

And if there's a better or more cost-effective way of printing something — such as moving from pure offset to a hybrid alternative — Xerox builds the business case and implementation plan, so that the firm can make the switch with ease.

As a next step, Xerox will introduce a management portal to give the firm closer control over every stage of the print production process. Users will be able to submit jobs, involve third parties (such as translation agencies) in the workflow, gain approvals, and track costs and progress. So they'll always know what stage a project is at, and what to expect next.

STEPPING INTO THE FUTURE

As well as streamlining key printing processes, the firm's partnership with Xerox has enabled it to advance its digital transformation ambitions. Relying less on paper and more on digital will simplify information access for staff working from home or on client sites. And in the fiercely competitive professional services industry, support for digital and mobile working will play a key part in attracting new talent to the firm.

In Germany, use of the scanning platform is accelerating the first stage of the client audit process. The firm scans and indexes on receipt thousands of critical documents clients submit at financial year end. The scanning process includes checking that each document has been signed by the client — a compliance requirement.

The success in Germany has already led to other European locations adopting the same scanning practice.

Next, the firm is working with Xerox on increasing the data extraction and processing speed, and scanning and routing documents to a range of business processes and workflows.



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