ECM Initiative at Programmers Investment Corporation Handles Complexities of the Direct Marketing Industry

Programmer's Investment Corporation (PIC) is a direct marketing services leader that continually provides innovative systems, services and solutions to its prestigious client base. PIC's management team provides their clients with over 30 years of industry-specific expertise and a wide range of direct marketing solutions including complete turn-key processing solutions. PIC will receive mail; open, scan, batch and process orders; post billings; process cash and credit card payments; manage collections; and provide customer service for a wide array of campaign types. In addition, PIC also offers customized reporting, data warehousing, list management, letter shop services, pass through processing, over 200 fulfillment partners and a highly trained account management team.[1]

In order to continue their endeavor to offer the best service to customers and gain a competitive edge over their competition, PIC decided to implement an Enterprise Content Management (ECM) system. This would allow them to improve productivity while reducing costs. Therefore, they'd be able to keep their operations in-house and compete on a cost basis with companies that are using overseas solutions to reduce their labor costs.

> While other companies are outsourcing overseas to keep their costs low, PIC has implemented an in-house content management solution that allows them to increase efficiency and accuracy while controlling costs.

PIC's President, Rick Ziemek and Chief Information Officer, Jim Heck, along with Ed Cheszek, VP of Systems Development researched the content management, image capture and forms processing solutions in the market and found IDT in Itasca, Illinois. After IDT completed an initial requirements analysis and presented solution options, PIC decided that IDT offered the best solution for their specific needs – the IDT Pilot Pack™. IDT's solution included custom validation routines and UNIX line-of-business software development work performed by IDT and quality products from EMC Captiva, EMC Legato, and Bowë Bell & Howell.

Before investing in their ECM solution, open batch and key costs were labor intensive and expensive. PIC experienced the same problems with saving their sources for retrieval and validation. Manually sorting and processing 600,000 incoming documents per month was time and labor intensive. PIC also wanted to improve the productivity of their data entry staff by enabling a "key-from-image" process. They hoped that by keying data from a document's image rather than the actual paper source, the process would be quicker and more accurate.

When it came time to purchase a solution, PIC knew a significant investment would be required but also realized it was a cost containment initiative and so the proposal was

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[1] Programmers Investment Corporation, *Company Profile,* Retrieved January 13, 2005 from http://www.pic-online.com/whoweare.html

accepted. In order to help PIC maximize their ROI, IDT recommended a phased approach to the system implementation. By using this phased approach, not only was PIC eliminating the risk associated with putting in an enterprise-wide system in one fell swoop, they were also better able to measure results and validate their assumptions along the way. Phase I and Phase II of the system have now been in use for about two years.

Now that PIC is able to scan almost all incoming order forms that consumers have sent in as they arrive, throughput and accuracy have increased dramatically. The time and effort it took to sort and batch orders has been reduced. The existing staff is now able to handle more orders. Because their core staff is able to function more efficiently, PIC has also been able to reduce their use of outsourced and temporary labor.

PIC's original thought that the new "key-from-image" approach to data entry would be faster has proven correct. After the implementation of their IDT Pilot Pack ECM system, data entry speed increased nearly 20 percent. And because they've been been able to reduce their costs, PIC has avoided passing on the cost of living and other increased costs to their customers. This means they are better able to compete in their marketplace. They can maintain their cost structure while meeting their throughput commitments and keeping customers happy.

Another benefit PIC has realized is that source retrieval is now instantaneous. This is especially beneficial when dealing with an unhappy or confused customer. Instead of manually finding the paper document to answer a customer's question and then copying, mailing, or faxing it, the document can now be accessed directly on a customer service representative's desktop screen. Questions can be answered and issues handled in one quick phone call. PIC clients have also realized increased throughput, meaning their orders are processed faster.

> "As a result of implementing the ECM solution from IDT, PIC has realized higher quality, a significant savings in labor, and increased throughput and efficiency."
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> - Robert Castaldo
> Vice President
> PIC

PIC was very happy with the work they did with IDT. Because of IDT's expertise in the industry, the implementation went extremely smoothly and the benefits achieved have made a positive impact on PIC's bottom line. The success of the initial implementation with the IDT Pilot Pack has prompted PIC to make plans to expand the system. The next phase of their solution will enable character registration as a method to input data into the order processing system. PIC is excited by the prospect of further increasing the efficiency of their data entry staff and overall business process.

Programmers Investment Corp. (www.pic-online.com) headquartered in Des Plains, IL., Programmers Investment Corp. (PIC) has more than 30 years experience in providing customized Order Processing, Billing, and Customer Service solutions for a wide range of Direct Marketing programs. Their state-of-the-art system and knowledgeable management team are ready to support your Continuity Club or Membership Club as well as your One-Shot, Catalog, Rebate and Coupon, Fund Raising or Recall Programs.

IDT, Inc. (www.idt-inc.com) helps mid-market firms achieve maximum efficiency through enterprise content management, workflow automation, records management, ERP, CRM and line-of-business solutions. From IDT Complete™, which enables customers to achieve both efficiency and compliance by integrating their ECM and ERP systems, to pre-engineered IDT Pilot Packs™ that ensure quick return-on-investment with ECM, IDT uses phased and flexible integration of industry leading software applications to place the power of scalable systems at the client's fingertips. Since 1992, IDT has provided a single-source knowledge base for system design, integration, customization and long-term support.