

# A Digital Mailroom

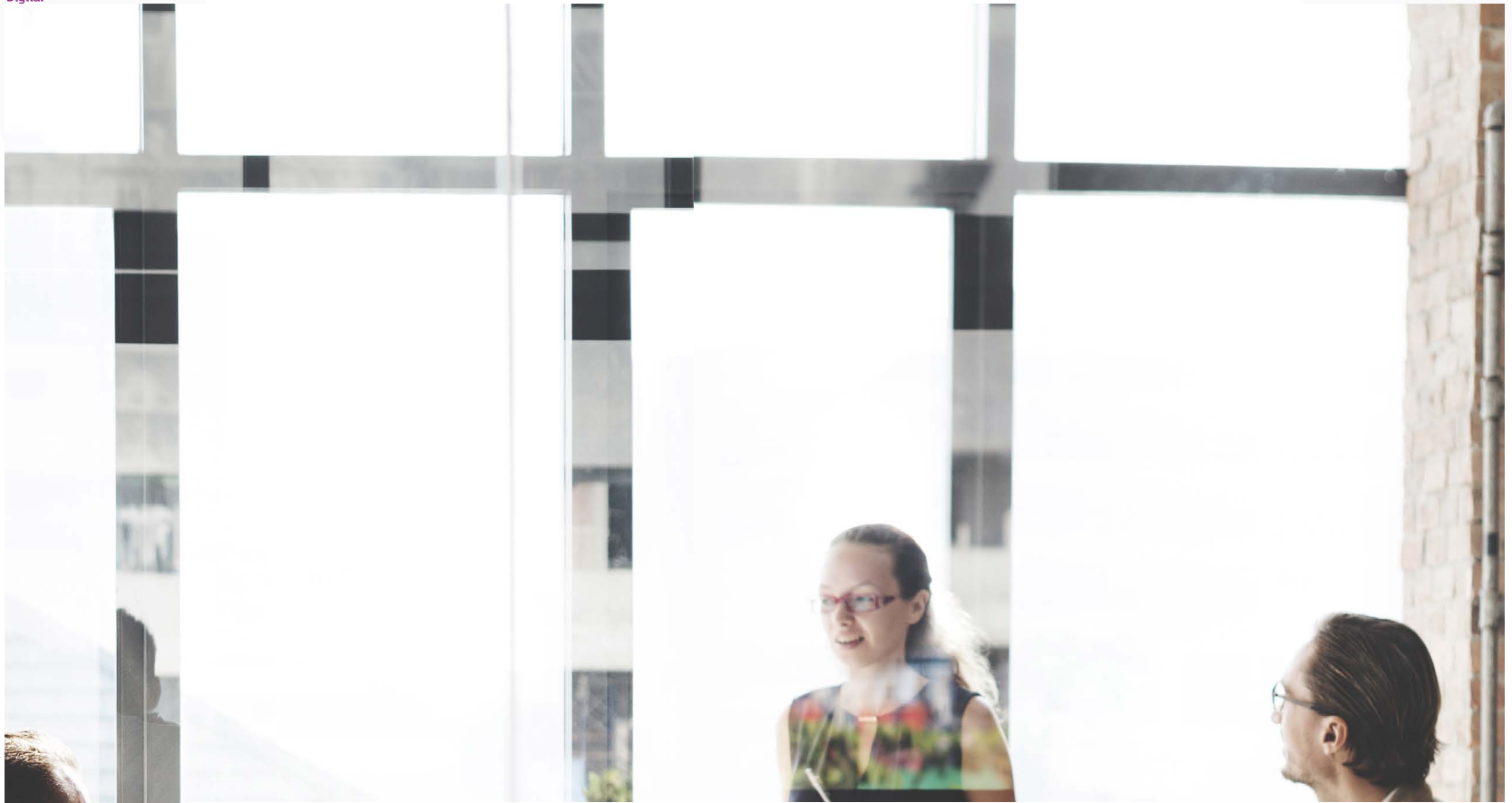
Agile.  
Secure.  
Efficient.

Reduce the paper entering your organisation.

Make the data in your organisation work harder.

Refocus your time on revenue generating activity.

Use smart technology to empower smart people to smart results.



Restore Digital is part of Restore Plc and together we provide the complete solution to organisations' document and data management.

At Restore Digital we help organisations empower their data, with security, auditability and compliance as the backbone.





# Introduction

**According to studies, over 90% of UK firms have at least one employee working from home. These colleagues still need access to mail quickly and accurately.**

**It is also thought that 75% of all business processes are initiated by incoming mail, either hard copy post, email, social media or sometimes even fax.**

It takes an enormous amount of time, resources and cost to manually sort, process and distribute in-bound communications.

The ability to process this daily flow of information quickly, accurately, securely and efficiently is important for your cash flow, ability to keep customers satisfied and retain them and ultimately your profitability.

# Mailroom pain points usually experienced



Mail is opened as it arrives rather than business need.



No immediate insight into what type and quality of mail is entering each day, to manage staff.



Exceptions, incomplete or incorrectly completed forms still go to business units to manage.



Once with your business unit, data needs to be manually extracted, and added to data bases, workflows and then actioned by your teams.



It takes a long time to manually open and sort.

"We had an inefficient process; it was not conducive with order trails or providing a service to customers. It was operationally inefficient"

- James Barron, Head of IT, Co-Op Legal Services

# Understanding the benefits of a Digital Mailroom

## **Increase customer satisfaction**

Respond faster with automated mail classification and routing.

## **Speed up transactions**

Speed up the time to realising revenue by making information available and into internal systems faster.

## **Increase visibility and control**

Gain real time knowledge on information entering your organisation.

## **Reduce operating costs**

Reduce the costs of sorting, organising and manually tagging documents.

## **Same day digitalisation and indexing**

Fast turnaround of the daily post, with service level agreements that mean relevant information gets to the right person fast.

## Scalable

Manage your peaks and troughs of mail without incurring unnecessary overheads.

## Security and compliance

Fully auditable from receipt, and once electronic, easily manage retention periods and permissions.

# Our reputation

We work with:

- 88% of FTSE 100 companies
- 86% of the top 50 UK accountancy companies
- 94% of the top 100 UK legal practices
- 67% of local authorities in England, Wales and Scotland
- 81% of UK National Health Trusts

Restore build long-term partnerships because we innovate, improve and ensure that you are always happy with the solution and day to day support we provide.

# Our approach

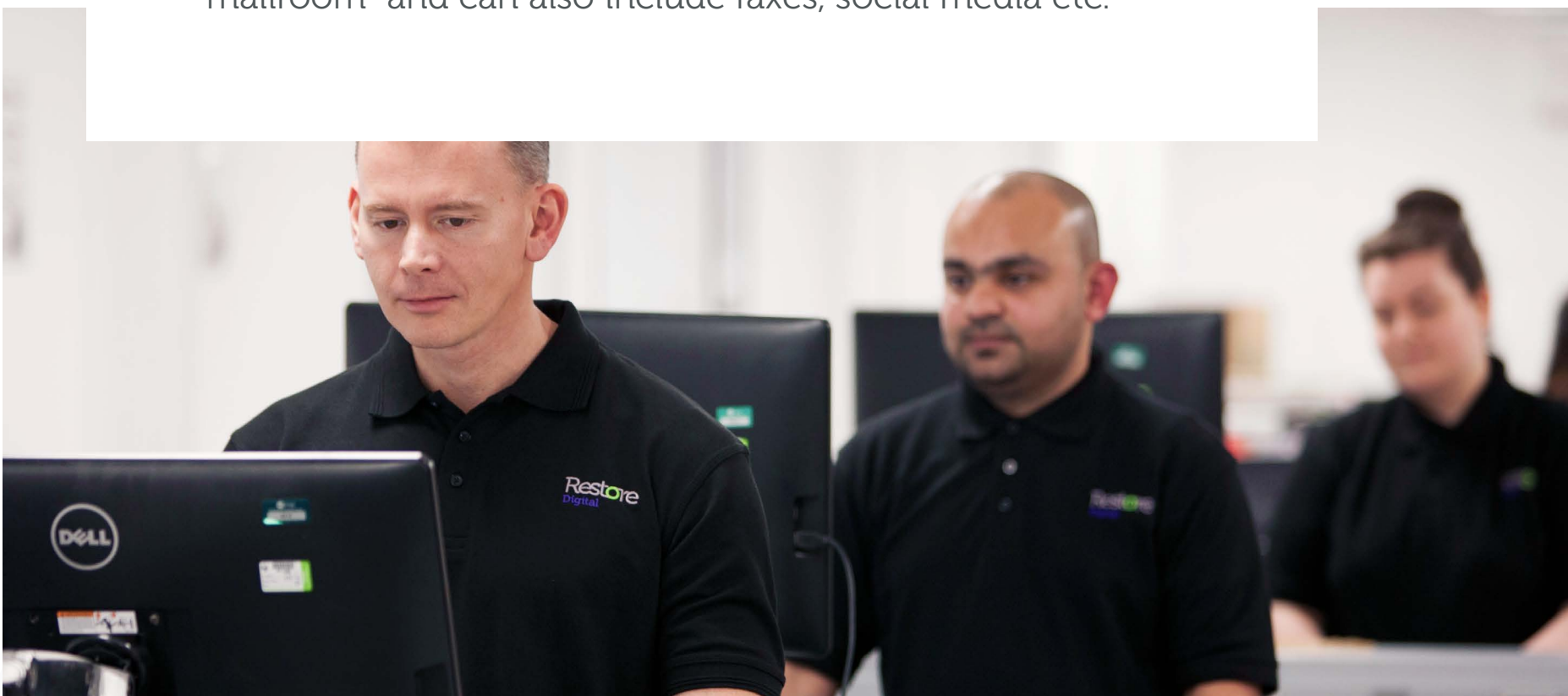
We have two approaches to digital mailroom. One is our “off the shelf” solution. Whilst every project had a degree of customisation, we use this term for basic digital mailrooms, where the solution is standard and therefore the costs are low.

However, we often work on larger more complex mailrooms, where our consultancy team develop a bespoke solution tailored to your specific pain points.

They often involved automated workflows and increasing the amount of work the mailroom completes for you. These likely involve our commercial team, helping you to measure your ROI and our Prince2 Project Management Team to minimise day to day business disruption, while guaranteeing project success.

## Our experience

Restore provide a multi-capture Digital Mailroom solution for Agria Pet Insurance. As well as physical correspondence, emails also come into our mailroom set up in our Manchester scanning centre. This is often referred to within the document management industry as a “omnichannel mailroom” and can also include faxes, social media etc.

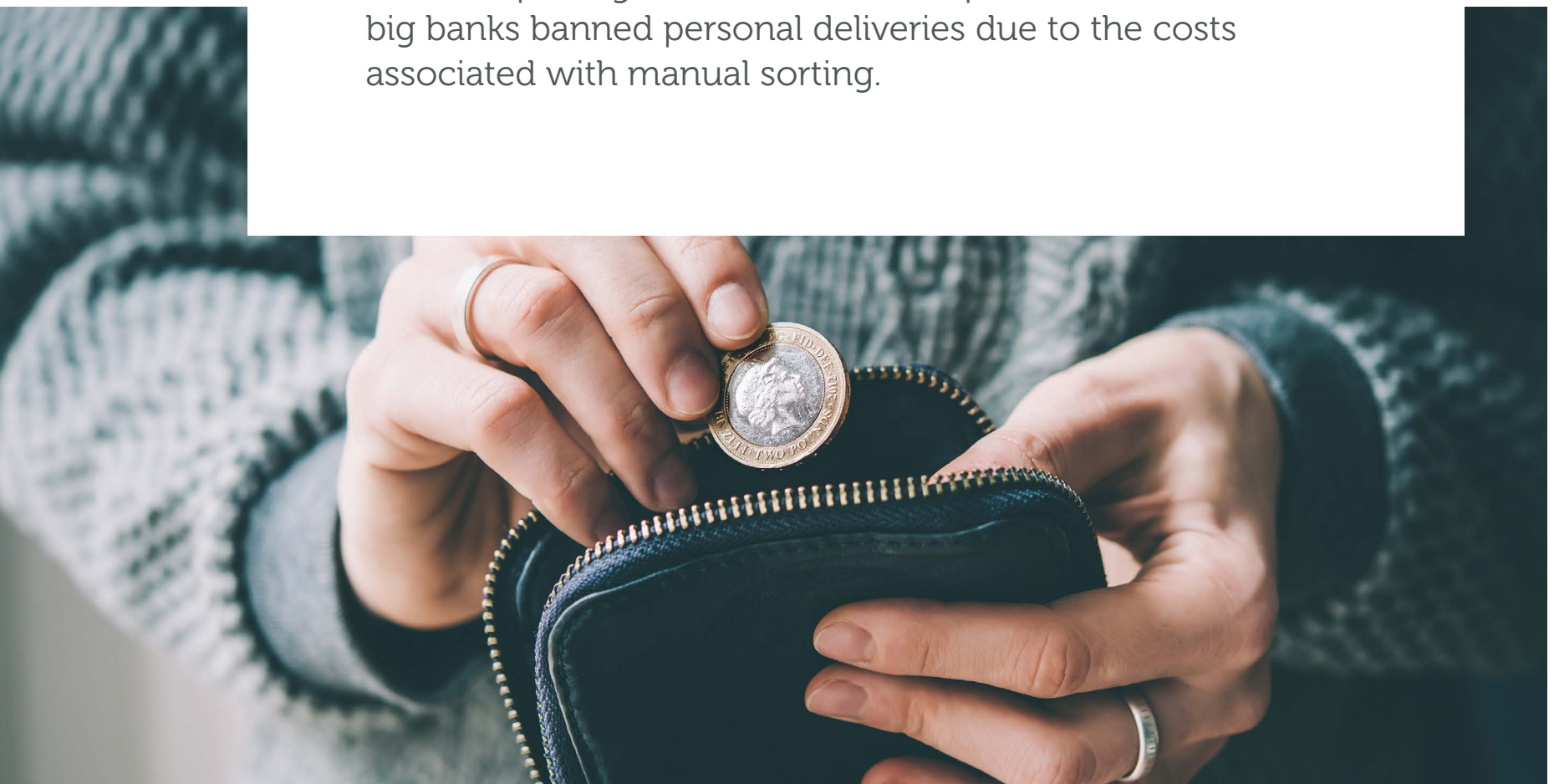


## Understand your current mail costs

Most organisations think their mailing costs are only associated with their outbound mail, e.g. printing, folding, inserting and mailing, and forget about the costs associated with receiving mail.

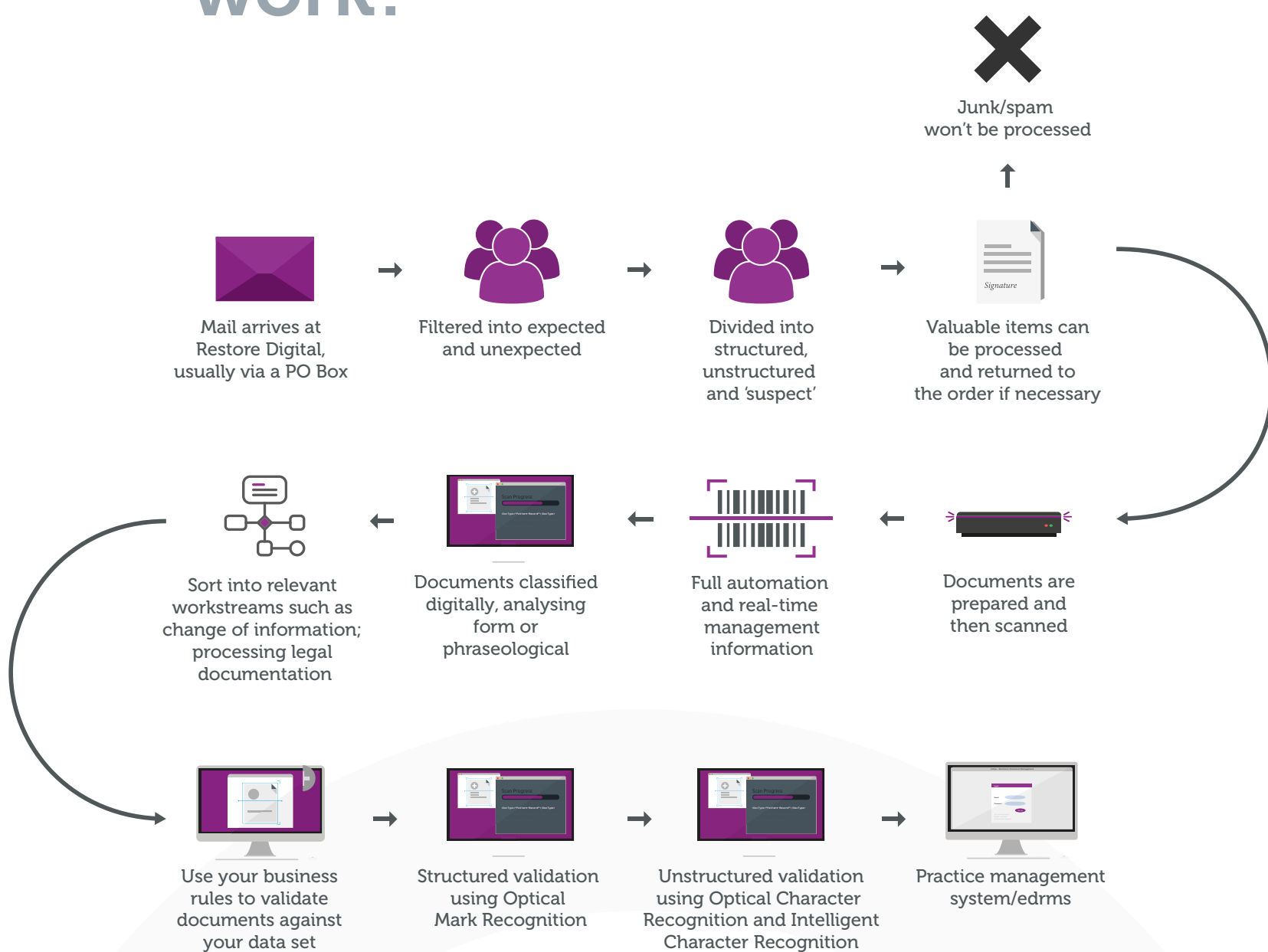
These could be the manual costs of sorting; but many organisations have a business cost due to the delays in getting information out of the mailroom and into the hands of the right person.

Recent news articles have even looked at the growing costs to organisations that allow staff to have their personal mail and packages sent to their workplace. In 2015 seven big banks banned personal deliveries due to the costs associated with manual sorting.





# How does a Digital Mailroom actually work?



# Understanding a Digital Mailroom

## Initial sort of the incoming mail

Mail will come from:



**PO Boxes**



**Faxes**



**Email  
attachments to  
a central inbox**



**Social media feeds**

A pre-open sort will take place, classifying:



**Spam**



**Suspect**



**White mail**

- Free form, unstructured letter
- A completed form, usually in a pre-printed return envelope

Any agreed SLAs will then be prioritised; e.g. returned forms over unstructured mail.

## Pre-scanning, preparation and Scanning

Once we open the envelopes each sheet of paper will be assessed to determine the quality and whether it can be scanned. We have a fleet of scanners and an experienced team in handling all document types and condition.

Part of the process is to assess:



The quality of the original – does it need improving, and if so, can it be improved ready for scanning?



Does the image require toggling? I.e. carbon copies may need colour toggling to ensure scanned images doesn't grey scale.



If damaged, can we repair?

Depending on the state, generally we prepare files by removing staples & other bindings and checking for items such as Post-it Notes obscuring data. We move these to either a blank part of the page, or onto an inserted blank page. In case of poor quality or fragile pages, these are photocopied to ensure scanning without further damage.

We insert barcode dividers to show where to electronically split the documents.

At this stage we will also filter out any unscannable or cherished items included in the mail. Any we remove as unscannable we will replace with a barcode header page. This links the item to the original full piece of mail.

Cherished items, like birth certificates, are scanned, but if required are put into a workflow for return to the individual. Cheques can be out sorted into a workflow and banked if required.

Restore Digital has the largest scanning capacity in the UK, operating from nine core scanning facilities, plus additional client sites. All our scanners can capture up to 600dpi in black and white, full colour or greyscale. All images are captured in TIF format and then exported to the agreed profile as part of the solution. The scanning output is designed and configured to your exact requirements.





To assist with this, samples are created as part of the pilot to aid you in defining:



Your required output sizes



File types  
(eg PDF, editable PDF, TIFF)



Correct colouring



Timescales

For most mailrooms we scan to black and white and 300dpi, but we will agree this through our "Statement of Works", which is not altered by the scanning operator.

We operate a fully compliant BS10008, BS90001 and BS27001 quality management process across our mailroom sites. Our bespoke tracking system allows us to monitor and report on the number of documents received each day. The number of documents scanned and the quality output. We match the figures to ensure 100% compliance.

As we scan the document, the operator performs the first level of Quality Assurance. Checking the page to image.

In summary, we undertake the following quality checks as standard:



Preparation files confirm with internal, as well as your specifications



Images produced and automatic indexing through barcodes, ensure technology is working alongside image quality



Data is correctly formatted and matched



Final images meet specifications

## Classification of structured mail

Visual classification logic will then analyse the form and structure of each document and automatically decide if a document is to be classified as (for example):



Contract



Customer  
Form



Letter



Customer  
Questionnaire



Invoice

Ideally, any post which involves the completion of a document created by yourselves would contain a barcode. This barcode would contain important information which will make classifying and extracting information later, much more accurate.

Even when a barcode isn't on a structured mail item, we can teach our systems to recognise the forms and classify accordingly.

## **Classification of unstructured mail**

We can't classify every document's pre-defined visual characteristics, especially if the document is generic or lacking page structure, for example an email or traditional letter. The document may well be a customer complaint or change of address which has a workflow we can route it through. Therefore, at this stage we would classify by automating the analysing of text for key words and phrases.

Optical Character Recognition (OCR) is the conversion of typed, handwritten or printed text into machine-encoded text.

We will push any exceptions into an "exceptions" workflow, for manual intervention. Each manual intervention feeds into our software. We use AI to make the software learn from each exception, reducing the need for manual intervention over time.

Once documents are classified, SLAs can then be applied which will ensure the mail is prioritised as per your business need.

## Data Extraction

Data extraction is a key element of the mailroom process, as it is the start of automation and operational efficiency. Not everyone requires this service, and a more basic digital mailroom is sufficient. However, if it is, extraction and automation allows your mailroom not only work harder for you but provide real ROI and operational efficiencies.

Once classified, being able to extract information such as invoice number, client name, invoice amount, a PO number, removes a layer of manual intervention. And once extracted this information can automatically be moved into emails, databases etc to prevent manual rekeying of information. There are three main tools for unlocking this data:



- **Optical Character Recognition (OCR)** is the conversion of typed, handwritten or printed text into machine-encoded text.
- **Optical Mark Recognition (OMR)** is the process of capturing human-marked data from document forms e.g. surveys & tests.
- **Intelligent Character Recognition (ICR)** is a handwriting recognition system that allows fonts & different styles of writing to be learnt.



## Automated data validation

If the extraction process flags data as “unclear”, Restore or yourselves can manually check using an easy user interface. Highlighted fields need manual intervention. The validation software is self-learning, so when manual intervention takes place the software learns from the process to limit future manual interventions.

Cognitive capabilities transform the way mailrooms can add value, through the understanding and interpretation of unstructured data, learning from past experiences to improve current tasks, and engaging with humans to improve interaction and experience.

Our software can also process forms and confirm correctly completed forms. For example, highlighting ones which haven’t followed the rules: all boxes have been ticked, or where there are marks which might or might not be a “tick”.

In the ideal scenario we would validate against a data set/ data feed. For example, matching a policy number from a letter, to a current policy number within your data set. The Restore solution can also flag within a workflow where addresses don’t match up, or the policy being quoted has expired etc.

## Workflow and automation

The digitised images are be pushed into an internal system already within your business or a Restore EDRMS platform, like DocuWare.

We will store all images within the chosen system, including any meta data. DocuWare, for example, can then be configured to either:



Have workflow folders where your teams can access the appropriate folder and begin processing the days mail.



Can store the day's mail for reference, but the information has been extracted and is "talking to" your internal databases. For example, a document classified as an invoice, can be matched to a PO within your Accounts Payable systems, and the invoice details extracted and added to the AP system, saving your team the manual data entry. Another example would be AI automatically updating your CRM system of an address change.

## Management Information and Reporting

Management Information on the whole digital mailroom process will be available in real time. This provides you with insight early in the day of the quantities of each type of mail that has arrived that day. This allows you to resource accordingly.

We will supplement with monthly reports, which will advise of quantities of mail items processed, and our performance against agreed SLAs. This is where you can define which type of mail needs processing by what time of the day.

## Additional services

Restore Digital's sister organisations can offer complementary services to support your digital mailroom. Once images are scanned, Restore will store the hard copy originals free of charge for 30 days, allowing you to complete any quality control checks your end.

After this period the post will be put into long term storage with our sister organisation Restore Records Management or securely destroyed by Restore Datashred.

We can also scan archived documents, if they will support the effectiveness of your digital workflows going forward. As

well as paper archives, some legal and insurance companies have asked us to digitise their fiche archive to support their digital mailroom and automated workflows.

Restore Digital have a trusted partner where we work together to build inbound and outbound digital mailrooms for some of our customers. This means that the printing and fulfilment of outbound post is offsite, with minimal electronic interaction by yourselves. The benefits to this, is that we work together and create the optimal workflow for your organisation, for example when a form is incomplete, usually missing a signature it would automatically be returned without passing back into your organisation. Similarly, if someone requests to update their details in an unstructured letter, if an official form is needed, this is sent without distracting your own internal teams.





# Case Study Halton Housing Trust

Halton Housing Trust are a not for profit housing association managing 7000 homes in the Cheshire towns of Runcorn and Widnes. A forward-thinking association and at the forefront for innovation both internally and the way they manage properties and look after their tenants.





## Project Overview

**One of Halton's internal goals has been to become as paperless as possible. Moving to the new purpose-built head office, Halton didn't want any paperwork to transport and take up valuable space. Staff are encouraged to work from home, hot desk and use the open office, designed for increased productivity and as a more pleasurable working environment.**

Electronic documentation is readily available to staff wherever they are via the DocuWare Electronic Document Management System (EDMS), supplied by Restore who have also captured all legacy files into the system linked to their internal housing management system.

The last piece in the puzzle was to stop paperwork being sent to their office from customers, tenants and suppliers. Restore incorporated the same digital mailroom service used for HSBC and Nuffield Health for the Housing Association. A test project was put into

practice to electronically capture the incoming mail. All paper invoices, brochures, letters and legal documentation, were re-directed to the digital mailroom.

Images are scanned and directly loaded daily into the EDMS for departments, with complete visibility and transparently for staff and managers alike. This process guarantees the safety of the business-critical documentation, provides a backup of images at the first instance and an audit trail from the moment it hits the association.

The entire process has been moved to the cloud for a truly paperless and digital working environment.





**Speak to the team today, discuss your business needs and we'll advise you on a solution for your situation.**

**Click the address below**

**[info@restoredigital.co.uk](mailto:info@restoredigital.co.uk)**

Join the digital transformation discussion on LinkedIn:

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