Document Imaging System Fulfills Hallmark Data Systems' Quest to Streamline Operations

Customized system has reduced data entry labor costs, processing times and storage requirements providing significant savings

When all the data your company needs to do business comes in the form of millions of pieces of paper, finding ways to streamline is an absolute necessity.

Such was the case at Hallmark Data Systems, Niles, Ill., a leader in publishing house circulation fulfillment. Each year, the company handles millions of subscription forms with thousands of variations. Sorting subscription forms, entering individual subscriber information, and creating and maintaining audited databases for the approximately 300 titles Hallmark fulfills is time and cost intensive at every juncture. Dozens of people were required to move forms through the system, leading to yearly data handling costs in the hundreds of thousands of dollars. Significant investments in document storage facilities were necessary to comply with BPA (Business of Performing Audits) International audit regulations.

But that's all changed now with the implementation of Hallmark's full-scale content management system from Integrated Document Technologies, Inc. (IDT). The solution has reduced data entry labor costs by more than 50 percent and also reduced processing times and storage requirements. Customer service has improved, productivity is up, man-power requirements are down, and lost documents are a thing of the past. Not surprisingly, the system investment was amortized in just one year.

Hallmark's Network Telecommunications Manager Julius Turk began investigating document imaging began back in the mid 1990s, when new technologies were just being introduced. Management initially questioned the expected return-on-investment – an important consideration for any business.

By early 2001, advances in imaging technology prompted John Kalomiris, Hallmark's Director of Data Capture, to revisit the imaging project. Kalomiris' research led to IDT, a content management solutions designer and integrator, based in the Chicago suburb of Itasca, Illinois. Although Kalomiris had completed extensive research, an advisor helped him and others at Hallmark understand imaging in easy, layman terms.

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After IDT worked with Hallmark to develop a Requirements Analysis, the recommended solution was evaluated through the purchase of an IDT pre-engineered starter system — the IDT *Pilot Pack*™. The new system yielded immediate results at Hallmark: staff members found it easy to use and it more than paid for itself during the four-month trial run. With the Pilot Pack's success and proven return on investment, Hallmark management proceeded with implementation of a full-scale enterprise content management system.

IDT's system design was based on satisfying key functionality and cost considerations for the short-term and scalability and web-based access for the long-term.

System components:
- Three **Kodak™ 7520D** scanner stations image more than 50,000 forms a day
- **Kofax Ascent®** software captures and indexes the scanned images into electronic files
- **Stellent Imaging & Business Process Management (IBPM)** software files the images for permanent storage and allows users to immediately access and view the documents
- Two **ProLiant™ servers by HP** (one acting as a back-up system to ensure that the imaging system remains operational at all times) run the system independently from Hallmark's main computing network
- **Plasmon** Jukebox stores the all the captured information
- **MagnumTRANSACT™**, a software module from IDT, enables files to be pulled automatically, without manual intervention

In addition to the daily tasks handled by the content management system, each publisher title undergoes an annual, formal audit conducted by BPA International. This audit is vital and ensures that all subscriptions are processed in accordance with BPA guidelines. Previously, the task required an individual staff member to spend two to three days recovering 127 specific documents from the warehouse. Using the automated extraction capabilities of the new software module customized by IDT, this task is now completed in just a few minutes, efficiently and accurately without human intervention.

BPA requirements also mandate that subscription data processed through an electronic imaging system have an 'audit trail,' and that the technology be Write Once Read Many (WORM). Hallmark's new system meets both requirements.

Because audits are the culmination of a year's worth of data, Hallmark views the content management system and its success as a "showpiece" of its service offering to publishers. "Hallmark is far more exacting than other fulfillment houses. Our process allows more flexibility," explains Turk.

One of the most important investment considerations for any new technology is scalability to meet future needs. For Hallmark, future plans are already underway and include; enhanced customer access to subscription data via the Internet, automated incorporation of inbound faxes, and capability to provide subscriber name lists per customer specifications.

"Continually enhancing services to our customers is one reason for our leadership position in the industry," says Kalomiris. "This technology is mission-critical for Hallmark internally, and for new business. Publishers will recognize that Hallmark's investment in this technology is an important differentiator." Hallmark's parent company, Jordan Industries, is closely monitoring progress to determine which of its other subsidiaries could reap the same cost-savings benefits by implementing a similar system.

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Hallmark Data Services (**www.halldata.com**) performs circulation fulfillment for more than 360 business publications, most of whose circulations are audited by ABC or BPAWW. Several of these must pass unit audits. Hallmark is a member of the Audit Bureau of Circulations, American Business Media, and BPA Worldwide. We provide everything from front-end clerical labor and supervision to preparation of issue labels and reports and other extracts. Our system is designed with numerous checks and balances to be sure transactions are not lost, backlogs do not arise, and that splits and extracts are shipped correctly and on-time.

IDT, Inc. (**www.idt-inc.com**) helps mid-market firms achieve maximum efficiency through document imaging, workflow automation, ERP, CRM and line-of-business solutions. From pre-engineered IDT Pilot Packs™ that ensure quick return-on-investment, to phased and flexible integration of industry leading software applications, IDT places 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.