Dialogue
THE SOLUTION FOR ENTERPRISE DOCUMENT AUTOMATION
and refused to accept any limitations we built from the ground up and refused to accept any limitations
Introduction ::

Exstream Software was launched in 1998 to change the way companies communicate with their customers. At the time, most software vendors were investing in the development of solutions for doing business over the Internet, including customer relationship management software for the delivery of messages through that medium. It seemed to us that these vendors had too narrow a view of customer contact channels. Almost all were missing or ignoring ongoing mailing activity as a means of customer relationship management. To do effective enterprise CRM, we believed companies would have to have a multi-channel strategy that included printed and mailed communications as well as online interactions. Our insight was that communicating with customers consistently and relevantly requires an integrated approach across all applications within the enterprise.

So we set out to build a software solution that would make traditional document composition software obsolete. Our goal was to address the trend toward personalisation with a faster, more efficient way of creating high-quality customer communications for delivery through the preferred print and electronic channels.

What we brought to market was a comprehensive software platform for design through delivery of any type of customer communication—whether mailed, presented electronically, or generated in real time as part of a custom application. Given that high-quality personalisation is dependent upon high-quality data, we built a platform with an open architecture that could easily fit into diverse IT environments and simultaneously access and process multiple data sources of any type. The platform was also designed from the ground up to make it easy for marketing and business users to collaborate on content creation, significantly reducing document development and maintenance costs and dramatically improving time to market.

We called our solution Dialogue to represent the type of communications that truly speaks to customers one at a time—even when your customers number in the millions. With it, we introduced a more effective, automated way of communicating with customers. Today, Dialogue is recognised as the market-leading software solution for enterprise document automation.

Dialogue—a single software platform for enterprise document automation.

Dialogue is the fastest product on the market for producing personalised documents and is one of the most advanced systems I’ve ever seen. We have yet to experience any limitations.

Per-See Technologies :: Chris Peterson
a single platform to support our vision for enterprise document automation

Dialogue is a comprehensive platform for building and deploying all high-volume, on-demand, and interactive document applications across the enterprise. It was designed with an open architecture and robust functionality to easily connect with an enterprise’s data sources, systems, and web infrastructure. With just one solution you can create relevant and timely communications that connect with your customers at every touch point.
The need for relevant, timely communications

In the eyes of the customer, communications aren’t just about the companies they do business with; they often are the company. The requirement for customer intimacy has become so essential to retaining customers that businesses will not remain competitive without the technology and processes necessary to deliver completely personalised, relevant communications consistently across all channels.

While many companies are elevating communication strategies and business processes to an enterprise level to gain a more complete view of the customer, execution isn’t always easy. For large enterprises, the necessary information is often maintained by several departments or dispersed groups using a variety of systems and technologies that aren’t integrated. To improve the customer experience while increasing internal productivity and controlling costs, an enterprise document automation platform is required.

Setting the standard for enterprise document automation

Exstream’s Dialogue is a fully integrated software solution that allows you to design, develop, maintain, and output fully personalised and consistent communications of all types for delivery in high-volume print/mail and real-time service-oriented production environments.

Companies of all sizes across industries as diverse as financial services, banking, insurance, utilities, government, telecommunications, service provider, travel and hospitality, and retail use Dialogue to reduce document development and production costs by as much as 80%, get to market with critical communications up to 85% faster, as much as triple customer response rates, and improve the customer experience with clearer, relevant communications delivered through preferred channels.

A single comprehensive solution

The Dialogue platform easily fits into diverse IT environments, streamlining document processes and workflows by automating manual steps and eliminating point solutions with its flexibility and depth of functionality. Data and content can be directly retrieved in real time from an unlimited number of diverse data sources simultaneously, eliminating pre- and post-processing systems and expensive maintenance.

Its intuitive and role-based design environment speeds document development and maintenance with collaboration from multiple lines of business and reusable components that can be automatically updated in all document applications when a change is made. Tasks that used to take weeks or months to complete are finished in hours or days using Dialogue.

For production of high-volume, fully personalised statements, bills, marketing, policies, long documents, correspondence, and real-time creation of documents such as customised contracts, and letters, there is simply no other software solution like Dialogue.
KeyBank saves £800 thousand annually in production expenses using Dialogue to create its high net worth and retail check image statements.

KeyBank :: Helene Matheny

We’ve decreased our document inventory by 77 percent.

Aflac :: Luanne Gentry

The main reason we chose Dialogue was to reduce calls to the customer service centre. Dialogue gives us the flexibility to expand our descriptions of charges, put detailed notes in the white space of the bill and use highlight colour to make things stand out.

ERTEL :: Sandra Kowalski

Dialogue customers report hundreds of thousands to millions of pounds in annual savings by trimming costs and increasing efficiency at every stage of the document production process.
Cut postal costs.
Postage and fulfilment is often the single largest expense associated with customer communications. Dialogue’s high-volume production capabilities allow you to substantially reduce postage costs and the number of mailings by householding documents; consolidating multiple applications into a single document, like statements and newsletters; and supporting many different paper sizes and output options.

Campaign management capabilities can provide additional postage savings and better customer response by incorporating marketing messages and offers into regular correspondence—where customers are more likely to read them—rather than producing separate direct mail pieces.

Reduce paper costs.
Dialogue allows you to reduce paper costs by offering customers online presentment and producing electronic output for archival systems. Dialogue can simultaneously produce output for over 20 print and electronic formats in a single pass.

Drive down call centre costs.
Improving call centre efficiency is another way enterprises can improve their bottom line. To drive down the costs of servicing calls, which can average approximately £4 each, Dialogue helps reduce call volume through clearer communications. Delivering higher quality documents that are easier to read, contain more relevant content, and use highlight colour and targeted messages to clarify information, allows you to reduce the number of expensive customer inquiries.

Reduce total cost of ownership.
Most organisations have significant costs tied up in multiple document creation technologies, processes, and facilities. Adopting Dialogue allows you to replace many existing software products and in-house systems with a single, comprehensive platform for creating all document types, resulting in considerable savings on maintenance and programming costs. Dialogue’s high-performance engine also lowers your CPU costs and the number of servers required.

Improve IT productivity.
You can further improve IT efficiency by pushing application development and ongoing document maintenance to marketing and business users who can work independently of IT. Companies that outsource document creation can dramatically reduce development and maintenance costs by keeping design and content management in-house, while still outsourcing printing and fulfilment if desired.

Reduce document inventory.
Dialogue customers can significantly reduce document inventory through on-demand generation of customised communications like enrolment kits, directories, brochures, and other documents. Dialogue’s ability to add relevant content to documents at run time lets you dynamically assemble documents as needed, resulting in reduced inventory and the elimination of outdated and unused offset printed material.

The Dialogue Difference ::

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Dialogue customers go from design to delivery of fully customised communications as much as 85 percent faster than the time it took with their previous systems. They also save substantial time when it comes to modifying and maintaining documents.

Since implementing the software, we’ve significantly reduced development time and achieved a speed to market we never thought possible.

Powergen :: Emily Ashton

The biggest advantage of using Dialogue’s real-time capabilities is decreased costs and faster turnaround of information important to the reimbursement process for our hospital clients.

Per-Se Technologies :: Chris Peterson

Fifteen weeks after Exstream presented the initial proof of concept, Merrill Lynch began production on 1.2 million retirement fund statements using Dialogue. With its previous software, it took approximately 18 months to develop an application.

Merrill Lynch :: Rich Hopkins
Reduce development time.
Enterprises spend significant time connecting silos of information to customer document applications. Through its open architecture and comprehensive connector technology, Dialogue directly accesses content from enterprise systems and data sources to drive the creation of personalised customer communications. There is no limit to the number of data sources that can be directly accessed simultaneously—from legacy print files to COBOL copybooks to ODBC databases—eliminating the time it takes to develop and run programs that consolidate and reformat disparate data.

Increase productivity through collaboration.
To increase productivity and minimise reliance on IT, Dialogue was designed to meet the varying requirements of different users with different skills—from marketing to line of business managers to operations and IT. Dialogue’s collaborative content creation model allows an unlimited number of users to easily create business rules and variable content from their desktop or through a web browser for integration into documents at run time.

Automate time-consuming design steps.
Dialogue comprises some of the most sophisticated capabilities available for automating the complexities of difficult document design. Point-and-click design features for visual data mapping, automation of growing transaction tables, dynamic insertion of variable 3D charts, and management of sections and paragraphs, make designing complex statements, long documents, and other sophisticated designs much faster than with other products.

Automate regulatory compliance.
Dialogue makes it easy to manage varying content to comply with government regulations and privacy legislation. Its compliance support capability enables companies to ensure that appropriate content is automatically included in customer documents based on effective dates and jurisdictions.

Dramatically cut turnaround time.
Dialogue’s on-demand document processing capabilities give customer service representatives, agents and other customer-facing staff the speed they need to meet immediate customer demands. Using connectors or web services, Dialogue Real-time easily integrates with your existing interactive or web-based systems to deliver fully personalised documents on demand. Your interactive system sends data entered by users to the Dialogue Real-time document service. The required document(s) is immediately composed upon receipt of the data and sent back to the requesting system in real time in the desired format.

Modify applications quickly.
Dialogue’s component-based design environment makes it much faster to change document applications. In Dialogue, applications are made up of many design objects that are stored in a component library. When a change is made to a table, design element, paragraph or other object, Dialogue automatically updates every occurrence of that object in all applications in which it resides, significantly reducing application maintenance time.

Output to new formats without redesigning.
Dialogue’s design-once-deliver-anywhere capability allows you to design an application one time for delivery through any supported delivery channel in black and white, highlight, or colour. All fonts, overlays, and resources are automatically created for the target output device so there is no need to change the original design when outputting to new formats or in different colour modes.
What we found was the mailer with the same images on every piece averaged a two percent response rate, while the mailer with the personalised images, based on customer interests, garnered between 18 and 40 percent response.

Adding personalisation and relevance to communications through customised images, messages, and other variable information generates customer response rates that surpass the typical two percent rate by leaps and bounds. Higher response rates give you more opportunity to interact with customers, ultimately driving additional revenue.

The response rate on the variable data direct mail campaign was 30 times higher than traditional static mass mailings.

W.A. Wilde :: Robert Reeder

RPT Digital :: Nicholas Brusco

Vestcom International :: Joe Mislinski

Creating highly customised booklets with three levels of personalised promotional information for a healthcare provider has tripled the response rate.

W.A. Wilde :: Robert Reeder
### Automate targeted messages.

Dialogue’s unique white space and campaign management ensure you’ll never waste valuable real estate for capturing your customer’s attention. Campaigns that include rule-driven, targeted messages are created independently by distributed users and stored in a common repository for use across all applications and touch points. At run time, Dialogue relies on the tracking Knowledgebase for information on how the customer may have responded to prior campaigns, and uses a sophisticated algorithm to prioritise and incorporate only the most relevant messages and offers into the document. Dialogue also drives inserters to select pre-printed inserts based on customer criteria.

### Create more relevant communications.

Dialogue provides the technology to dynamically build highly customised communications that go beyond basic personalisation. It easily accesses customer information from CRM, ECM, legacy, and other systems distributed throughout the enterprise and can pull content from a library of variable text and images at run time based on business rules and available white space.

### Boost response with colour.

Studies show that adding colour to communications can significantly improve customer response. Dialogue supports all colour modes and allows you to design in full colour and then output in colour, highlight, or black and white, with no changes to the original design.

### Expand touch points.

Another way to increase response from customers is to communicate with them through their preferred channel at the right time. Companies that are able to coordinate the customer experience across channels have more opportunity to follow up with them to increase touches and impact, building stronger, more loyal relationships with customers.

Business rules determine which delivery channel to use for each customer. Some customers may want to only receive their communications online, while others may want them online as well as printed and mailed. Output for high-value customers could be printed on higher quality paper in colour, while output for other customers could be directed to a black and white device using less expensive paper.
Providing high quality service and implementing programs to continually improve customer satisfaction are critical to any successful customer retention strategy. Dialogue empowers you to standardise the creation of all personalised customer communications on a single platform across all lines of business so you can deliver cohesive, timely customer communications that reflect the total client relationship.

**Clarify your communications.**
Key to influencing customer satisfaction is the clarity of the communications you provide. Documents that are confusing or difficult to understand create questions that may require your customers to contact customer service, increasing costs to the business and resulting in what can be a time-consuming, frustrating experience. Dialogue offers a robust feature set for design, colour, tables, charts, and languages to produce more graphic, visually appealing documents that simplify complex information. Its targeted messaging capabilities clarify communications with explanatory messages placed at the point of need, resulting in more effective, easier to understand documents.

**Reward your best customers.**
Progressive enterprises use tiering and segmentation strategies to interact with customers differently based on their value to the company. With Dialogue, companies can carry out strategies for controlling document production costs for low-value customers, while delivering higher quality communications with targeted campaigns that up-sell and cross-sell additional products and services to high-growth and high-net-worth customers.

**Improve customer service.**
Dialogue makes it easier for customers to do business with you. Retrieving quotes, enrolment kits, statements, brochures and other relevant information on demand allows you to meet customer expectations for better, faster service, as well as shorten the sales cycle.

**Create better customer interactions.**
Dialogue’s real-time services and document management capabilities allow customer-facing employees to quickly find and view bills and other documents online, make reprints on the fly, or email PDFs upon customer request, ensuring that service is quick and effective.

Ninety-six percent of focus group participants found the new statement easier to read and understand, and 89 percent felt it provided a clearer understanding of their investment plan and personal options.

*CIGNA :: Mary Beth McCormack*
## Sample Dialogue Document Applications

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