

Overview

Many organisations face document delivery problems. This paper explores the issues around document delivery requirements, and seeks to present some guidelines which may be useful when examining possible solutions.

Document delivery – what is it?

The term ‘document delivery’ often evokes a vague response to what may seem an abstract or particularly complex concept, and thinking of ‘document delivery systems’ may similarly evoke mental pictures of a gargantuan system with tentacles spreading across an organisation.

In some cases such images may fit the realities, but certainly not in all. In its essence, document delivery is something that *every* business, large or small, performs incessantly. Increasingly, the term ‘document’ refers to an electronic document rather than a paper document, and these forms of transmission often occur dozens of times a day even in a small office. Faxes and emails have become a mainstay of business communication, and these can be squarely located within the realm of document delivery, along with hand-delivered or posted communications.

Simply put, document delivery is getting a document from A to B.

Documentation is a predominant currency of communication within the marketplace, to the extent that most businesses could not function without it. It follows that the delivery phase of such a crucial component of a business’s operations should not be overlooked with regard to efficiency assessments.

Issues

Issues are effectively the *symptoms* of *causes* (which are explored later). That is, issues are what become manifest when an organisation has a number of factors which contribute to a difficult document delivery environment. Figure 1 on page 2 is an example Ishikawa Cause and Effect Diagram depicting a manager’s investigation of her business’s document delivery problem. This section examines the kinds of problems that may be identified in such an analysis.

Issues potentially associated with document delivery can be grouped under two broad headings (“productivity losses” and “inconsistency”), and a discussion of the subtleties of these issues is also provided below.

Productivity losses

This issue group can effectively be described as a business spending more time *administering* its business rather than *performing* its core business tasks. Put simply, in such a case, the onus of document delivery means too much of staff time is spent performing non-revenue producing tasks. Businesses in this situation have three obvious choices:

1. Quantify the cost of document delivery and pass this cost back to the customer
2. Absorb the cost of document delivery and accept lower profit margins
3. Seek efficiency gains with a document delivery system, with a view to realising return on investment (RoI) through ongoing savings.

In the case of a more complex delivery environment, productivity losses incurred by training overheads may also occur. Even basic induction associated with familiarisation around equipment use and stationery location (“the toner has run out and I don’t even know where the new cartridges are, let alone how to install one”) takes time, and with more bureaucratic organisations, hierarchical delivery and approval paths present added difficulties for new staff.

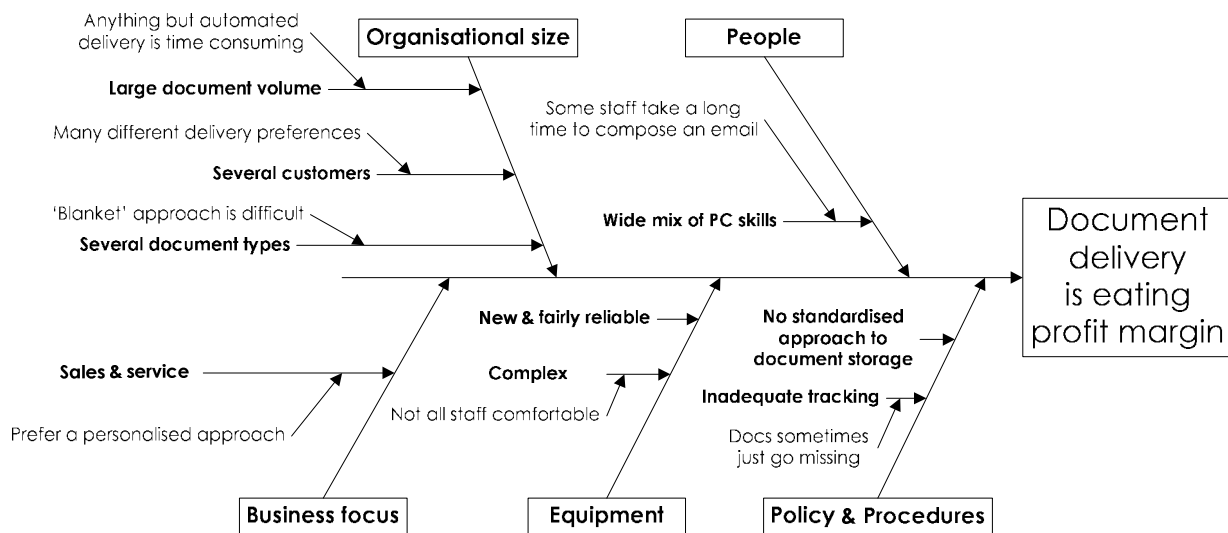


Figure 1 – An example cause and effect analysis of lost profits due to document delivery issues.

Inconsistency

Inconsistency in the realm of document delivery refers to a number of possible scenarios, including:

- Customers receiving documents in differing formats (and potentially in a non-preferred format).
- Customers not receiving documents at all.
- Internal filing completed in a haphazard manner, according to individual staff preferences/practices.
- Disparate and decentralised records of document deliveries (e.g. some in users’ email “Sent items”, some with read receipts, faxes with “faxed” date stamps), or no records at all.

“Underneath the radar”

Quite often business managers are unaware of, or only dimly aware of and resigned to, the issues surrounding document delivery. This is perhaps due to the misunderstanding which gives rise to the

misappropriation of the term 'document delivery' to describe, exclusively, complex systems which are not well-understood in terms of purpose and operation; that is, many businesses have not considered themselves as possible beneficiaries for a document delivery system because:

1. the *simplicity* of the issues has not been identified, or
2. the simplicity of the issues *has* been recognised but the issues have been considered an inevitable part of doing business, due to the perception that their simplicity falls outside the scope of a 'complex' document delivery system.

As such, many businesses exclude themselves from realising the benefits of a document delivery system by way of failing to recognise themselves as candidates for such systems.

Causes

The principal causes of document delivery issues are referred to here as "dimensions" of document delivery. Each dimension of document delivery has an impact on the overall document delivery environment, which may be positive (not likely to impact the business adversely) or negative (likely to impact the business adversely). It is therefore important to remember that the dimensions of document delivery can be causes of issues, as well as being factors which *alleviate* delivery issues.

Volume

Document volume refers simply to the number of documents an organisation delivers. It represents only one dimension of the document delivery problem, and as with the other dimensions, should never be considered in isolation. While it may seem a natural assumption that increasing volume will relate to increasing negativity of the delivery environment, it is possible that a 'tipping point' will determine the volume at which the delivery environment becomes unacceptably problematic. Prior to the tipping point, volume growth may actually lead to greater productivity as the business evolves internally, using internal resources and skills to increase efficiency. Again, however, it cannot be assumed that this trend will apply to all businesses, or that there may not be other negative effects occurring.

For example, this period of pre-tipping point internal optimisation may be eroded by a decrease in the personalisation of deliveries: the business may use its own resources to improve processes and procedures, and make better use of their existing IT infrastructure to reduce the work involved in document deliveries (for example, using mail merge functionality), but staff may have less involvement with the output as a result, losing the personal touch. Figure 2 on page 4 depicts such a scenario.

Type

The dimension of 'type' effectively encompasses two dimensions – the type of documents to be delivered, and the *number* of different types to be delivered.

Document type is important as it creates the context of the delivery. For example, in general, it will be seen as essential to create a warm context for a document such as an introductory letter or a sales proposition, and less important to achieve a personalised approach for a remittance advice.

Similarly, the number of document types delivered by an organisation will impact on whether the business experiences a problematic delivery environment or not. The need to cater for a wider variety of contexts may limit some of the efficiency options available to a business, as they may support some document contexts better than others.

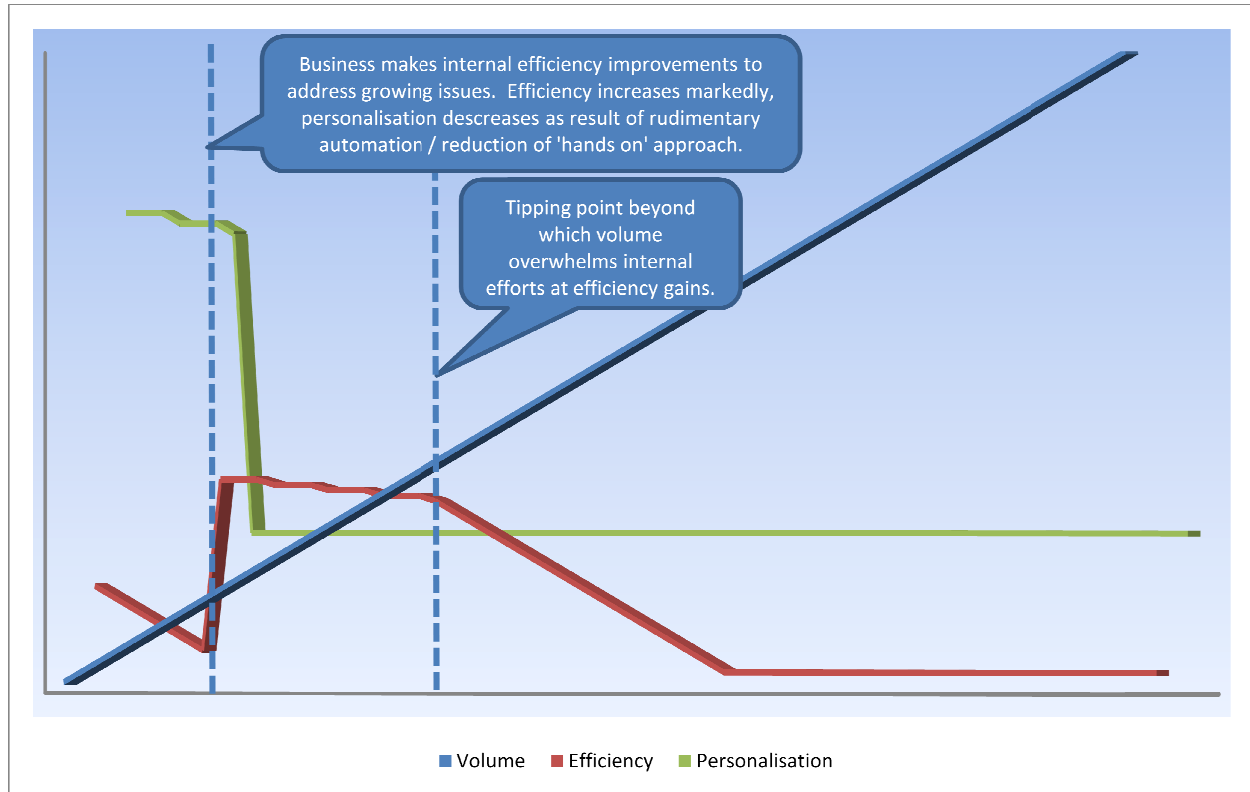


Figure 2 - Possible trends in efficiency and personalisation, in the face of increasing document volume. In this example the business starts with a small volume, and is able to personalise documents very well, and finds the inefficiency acceptable until it reaches extreme inefficiency in the face of increased volume. The business then implements changes in procedures and makes better use of their IT infrastructure, resulting in efficiency improvements, but reduced personalisation of document delivery. As document volume continues to increase, a tipping point is reached where efficiency declines as the limitations of previous improvements are reached.

It should also be noted that document type can also include the broad groupings of “internal” and “external”, and that these in turn may create their own contexts.

Organisational size

Organisational size can be regarded as a document delivery dimension simply because of the way in which an organisation’s size intersects with other dimensions. In short, organisational size is another dimension of the problem, which can potentially multiply or reduce any given set of document delivery dimensions.

It is important to remember that organisational size may not have the kind of effect which may at first present itself as obvious. While, in general, different issues apply to different organisations in differing orders of magnitude, these orders of magnitude may not necessarily reflect a trend towards consistently

proportional or inversely proportional relationships between the scale of the business and the scale of its document delivery issues.

For example, a small business may actually suffer greater productivity losses due to document volume, relative to its FTE base, than a larger company: due to the economies of scale enjoyed by the larger company, a devoted resource to manage document delivery may be a reality for the large organisation, but an expense that could not be justified in the smaller business, due to the lower volume (see Figure 3). Conversely, smaller businesses may find themselves more comfortably placed, compared to larger organisations, in terms of document type – that is, they may have less a less varied range of document types and formats to be delivered, and may therefore be able to handle their requirements with a more rudimentary system.

	Number of staff	Person hours available (38 hr week)	Hours spent on document delivery per week	Document delivery hours as a percentage of available hours
Large organisation	100	3800	74	1.95%
Medium organisation	25	950	30	3.16%
Small organisation	5	190	8	4.21%

Figure 3 - Document delivery scenarios for organisations of various sizes, assuming greater demarcation in larger organisations.

Similarly, a large organisation has a greater potential for granular demarcation, while the smaller business may not. As a result, key staff with specialist skills may spend unacceptable amounts of time on non-core administrative tasks in the smaller business, while the larger organisation may largely avoid this problem. Once again, though, a dimension such as document type may cut across the organisational size dimension and limit the level of demarcation an organisation considers acceptable: a sales package, for example, may not be the kind of document entrusted to a new administrative staff member to deliver, or the sales manager may simply prefer to further develop rapport with the potential client by accepting responsibility for personalised delivery.

Evaluation guidelines

Quantifying the problem

While there may still be benefits to be gained from a document delivery solution even if an organisation does not have a negative delivery environment, the benefits may not be significant enough to provide RoI. As such, businesses will usually attempt to quantify the problem, keeping in mind that, as yet, it may not have been recognised as a problem.

Short of embarking on a time and motion study (which may or may not be appropriate), quantifying the problem may be difficult, unless the organisation has detailed timesheet data available. Best estimates may need to suffice. Items to be considered should include, but not necessarily be limited to:

- time involved in producing deliverable output

- time involved in personalising deliveries
- time involved collating deliveries and extra information to be included
- time involved in using equipment (physically getting to equipment, loading paper, clearing paper, reloading toner, staff training)
- associated expenses – paper, toner, phone calls
- time/cost/loss of goodwill incurred by any inconsistencies (see page 2).

A qualitative investigation may also be beneficial – a brief consultation with staff to gain an insight to how they feel about their current document delivery workload can be useful. Given the opportunity, many staff will be vocal regarding any task they feel requires an undue proportion of their time. It is important to remember that administrative staff may consider document delivery to fall squarely within their role, and as such may not regard *any* amount of time as excessive, but as a rule, most staff, regardless of role, will value any efficiency improvement.

A demonstration of document delivery systems is one way to effectively gauge what kind of efficiency improvements can be gained. Due to the ‘underneath the radar’ nature of document delivery problems (page 2), presenting staff with an alternative reality can awaken them to the possibilities of which they may have been previously unaware.

Using a tool such as the Ishikawa diagram (page 2) may also assist managers to isolate which dimensions contribute to, or alleviate, a negative delivery environment.

What to look for in a document delivery system

Key criteria for assessing document delivery systems should include:

- flexibility
- robustness/reliability
- RoI

The criteria of reliability and RoI are self-explanatory, but the notion of flexibility needs to be expanded to demonstrate its importance with regard to the different issues and dimensions of document delivery.

Different issues and dimensions

An effective document delivery system will cater for a wide range of document delivery environments, comprised of a variety of different dimensional requirements. While the ability to handle large volumes will be paramount for some organisations, a system should also cater for a large number of document types if it is to provide a ‘one solution fits all’ system.

For those organisations where document types include those which have a personalised context, the system should allow the organisation to achieve personalised, yet automated, delivery. Personalisation should include the ability to address the documents personally, to create personalised cover letters conforming to organisational standards, and to perform deliveries in the format preferred by the customer, rather than one dictated by the system. A flexible system would ideally support a variety of

different delivery setups, together with sub-setups, to facilitate support for minor but important contextual differences with regard to the document or the recipient.

Inconsistencies should be able to be addressed by the system, in the form of providing the ability to store documents in a consistent, logical, and accessible manner, as well as providing a record of what has been delivered, including such information as to whom, by whom, when, and by what means.

Productivity and cost savings should be addressed on multiple fronts. Automation of the delivery task itself is the obvious cornerstone of any successful document delivery system. Ideally, a system would operate in cross-application fashion, allowing all of a business's IT infrastructure to leverage the benefits of the system and therefore provide faster RoI. Ability to interface with other applications would provide further benefits. Any system that extends an organisation's ability to deliver documents electronically should be looked upon favourably from a cost-savings point of view, due to the reduction in paper costs, postage, ink/toner costs, and (if supported) professional letterhead printing.

In conclusion

This paper has attempted to demonstrate that whatever the approach taken to evaluating a document delivery environment, businesses should consider differing dimensions of document delivery *as they apply to that business*, since, as discussed above, different dimensions can interrelate in ways which have different outcomes in different businesses. Assumptions around organisational size ("too big" or "too small") should be abandoned until a genuine assessment has been made.

Successful document delivery systems should address the issues explored in this document, operating in a flexible manner that can accommodate a wide variety of, and combinations of, delivery dimensions.