

## success story

# Global Financial Services Company Brings It In House

Printable and HP enable Global 2000 financial company to produce personalized collateral on demand.

A combined solution from Printable Technologies and Hewlett-Packard made it possible for a Global 2000 financial services company to bring localized variable data printing, mailing, and fulfillment in house. The European-based global company provides financial services, including banking, insurance, and investment management, to millions of clients on every continent.

### The Problem

The Financial Services Company's in-plant printing center – a "print manufacturing facility" – originated to produce "system output" in the form of confirmations, checks, and statements. As the operation grew and developed, more services were added such as fulfillment of marketing materials, kits, and applications. A key staff member, trained and certified in Lean manufacturing processes, was tasked with finding technology that would bring digital print production for those marketing materials in house.

By 2005, the time had come to invest in new color devices and the print manufacturing team began exploring options that would provide a better quality of print than those in use at the time. Presses from three providers were evaluated and the team selected two HP 3050s to replace existing equipment from another provider. At the same time, corporation's marketing department asked about implementing new programs involving production of personalized marketing materials.

It was a simple question the team posed to HP: "How can we produce customized and localized marketing collateral in house with the equipment we've selected?" In response, HP introduced Printable Technologies, a long-time software partner. Solutions from Printable are optimized for HP production workflows and create customized marketing collateral, manage collateral catalogs and direct mail, and provide e-procurement capabilities.

### The Solution

Using the FusionPro® Web "Software as a Service" and FusinPro VDP tools, the print manufacturing team created three storefronts to manage catalogs of marketing collateral. Each storefront is designed for a particular product line and is built on a particular set of rules. One of the storefronts is actually used by an internal sales person who will submit the order on behalf of a broker or dealer. Another is set up so that representatives can order independently without having to go through a sales desk. The third storefront supplements a co-op marketing program with the ability to pay for items ordered above the program budget with a credit card. All three stores are integrated with Clipper Ship, the company's shipping application to provide labeling, manifesting, shipping, and customer reporting, by implementing Printable's optional Data Feeds.

### The Results

"Our Marketing Department wanted to give people the ability to procure a pre-approved piece of sales collateral that also allowed them to add personal contact information," said the Team Leader. "The products are then printed and mailed from our facility or bulk shipped back to the agent or dealer to use for seminars, conferences, or to mail themselves." For the direct mail programs, the agent or dealer uploads his/her own mailing lists.

Going from zero to full speed with three storefronts to manage catalogs of marketing collateral and offering personalized documents eliminates any history against which to measure. The independent agents and brokers simply had no access to variable printing capabilities.

**PRINTABLE™**

201 Lomas Santa Fe Drive  
Suite 270  
Solana Beach, CA 92075  
tel / 858.847.6600  
fax / 858.793.4120  
tf / 800.220.1727  
www.printable.com

For more information:  
[www.printable.com/success](http://www.printable.com/success)

Among the three stores, nearly 300 products are available to independent representatives. The storefront used by the internal sales desk offers more than 100 products, the storefront supporting a marketing coop program based on budget "points" offers more than 125 products, and the site offering products for purchase with a credit card has 46 products on it.

Because storefronts launched using Printable's solutions manage secure access based on predefined business rules, hundreds of agents and brokers go online each month and order personalized pieces that have already met compliance requirements and are pre-approved. They can be comfortable knowing that they can personalize and procure collateral appropriate for their own product line.

The variable document technology built into the solution also allows each agent or broker to upload his/her own mailing list for direct mail campaigns.

Two years into the program, the number of direct mail pieces distributed has leveled at a fairly constant amount. It's clear that customers are comfortable using the system because they are requesting additional options and programs. New functionality is always being explored and more storefronts are in development.

## Benefits

- Control of production and fulfillment of marketing collateral and direct mail is moved in house.
- Storefronts reflect procurement workflows already in place.
- More than 300 static and personalized products are offered online.
- All items in product catalog are pre-approved and compliant with regulations.
- Agents and brokers can upload their own lists for direct mail campaigns.

\* The global financial services company described in this case study has requested that their name and the name of their document services manager be kept confidential.