



# **Intelledox intelligent content creation**

---

**Managing bulk and ad hoc document generation**

---

Written by: Sue Clarke

Published August 2010, © Ovum

---

## ABSTRACT

Organizations in customer-facing industries require the ability to produce targeted output in the form of mass communications such as bank or utility statements, ad hoc documents such as quotations, or dynamic highly personalized content. However, they face a number of challenges in the production of these communications, which are costly and time-consuming to produce but are critical to the business and therefore need to contain consistent and relevant information delivered in an accurate and timely way. If not, the business risks non-compliance, associated brand damage, and ultimately, lost customers.

In an increasingly digital age it is no longer enough for organizations to produce communications in a paper format only. Increased competition and a more discerning public dictate that companies allow customers to choose their preference when it comes to how they receive and consume communications materials. At the same time organizations must be able to scale up their ability to produce mass communications and ad hoc documents. Robust systems and processes must be in place to ensure efficient production and guard against inconsistencies and duplicated work effort.

Although most organizations with large volumes of unstructured content now have enterprise content management (ECM) platforms in place, these systems alone do not adequately manage the process of creating structured documents. They also do not address the problem of so-called “document chaos” caused by insufficient management of the document creation process. Often the critical missing ingredient from the document lifecycle management system is a document creation facility for mass communications and ad hoc personalized documents. This is a specialist capability that is best left to specialized document generation vendors such as Intelledox.

Intelledox provides a rules-based content generation solution that separates the content from the presentation layer to enable business users rather than IT specialists to manage the content generation process. This allows organizations to create timely and highly personalized content that exploits cross-sell and up-sell opportunities and is delivered via the customer’s preferred channel.

This White Paper will examine the business and technical challenges faced by organizations in customer-facing industries such as banking and insurance, utilities, telecommunications, government, manufacturing, and trade in effectively producing communications for a diverse customer base. It will show that while ECM platforms are effective in managing the lifecycle of documents, they were not designed to manage the creation of mass communications or ad hoc documents containing similar elements, nor are they particularly good at managing data entry via web forms. It will explain how specialized document generation solutions can step up to the challenge and address these shortfalls. We will focus on how one solution, Intelledox Intelligent Document Creation, meets the challenge of mass-producing accurate and timely customer communications content, and highlight a number of real-world case studies at a variety of companies that have implemented and benefited from the Intelledox solution.

---

## BUSINESS ISSUES

Organizations operating in vertical industries such as banking and insurance, utilities, telecommunications, and government need to be able to efficiently produce targeted mass communications for consumers, such as statements, business-oriented documents (for example, the water usage guidelines in the Sydney Water case study), and ad hoc personalized documents. Getting these mass communications right is critical to the success of the business. Inaccurate, inconsistent, untimely, or wrongly targeted communications can damage the company's brand image, accelerate customer churn, and expose the organization to non-compliance with the risk of fines and bad publicity.

### **Decentralized control of the document-management process results in document chaos**

A lack of formal control over the generation of repetitive documents results in a variety of problems, not least producing multiple versions of the same document. This is often the result of a "copy and paste" paradigm, where errors in a document are propagated into new documents. The lack of centralized control over documents and associated content is a symptom of a broader lack of information governance in the enterprise. Left unchecked it leaves the organization vulnerable to the risk of non-compliance.

Haphazard document storage and access strategies exacerbate the problem. Without a centralized management strategy, documents created across the enterprise are typically stored in a variety of locations such as local drives and departmental shared repositories. Although most organizations now have enterprise search capabilities, the lack of consistent document-naming conventions makes it difficult to locate relevant documents using traditional keyword searches. Moreover, some search technologies are not able to search for and return locally stored documents or those residing on a departmental drive that the user does not have the appropriate rights to access. In addition, a search can return thousands of results, which the user then has to sift through to locate the relevant document.

Finally, there is the risk of duplicity and version control. The advantage of using version control is that content can be created well in advance of it being required because it can have start and expiry dates set against it to determine the timeframe in which it can be used. This is particularly important because standard content may be updated over time to take account of new terms and conditions or special offers for example, and without version control, users will not know which version of the content is the latest and should therefore be used, and could have repercussions if content is amended to reflect changes to regulations or legislation.

The net result of these challenges often means that users recreate documents because they are either not aware that a document has already been created, or they cannot locate it. This is particularly true where ad hoc documents need to be created. In many cases sections of these types of communications are standard, for example in an employment contract. However, users are still not able to take advantage of this. Even if a user is aware that a similar document already exists and is able to locate it, the solution is often to copy and paste portions into the new document. These inconsistencies can result in serious business errors such as failing to change personal details or a failure to use the appropriate corporate branding.

An additional complication is that customers have preferences with regard to the format they would like to receive communications in, and more importantly formats they will not respond to. A failure to recognize and adhere to these preferences can result in customers failing to read communications, or in the worst-case scenario, lost business.

---

**Organizations that do not control their content risk exposing their brand and themselves to non-compliance**

Traditionally, the task of creating mass communications has been handled by technologists, with business managers putting in a request to the IT department to create the communication that would then be approved by the business managers before publication. The process was often complex, costly, and riddled with latency, resulting in delayed business communications being sent out to customers. Clearly this is not acceptable in highly competitive market sectors where churn rates are high and organizations require a much faster time to market, and there is a need to be able to react speedily to changing regulations and legislation. Worse still, a failure to act quickly to these changes can result in non-compliance. The easiest and least costly way for organizations to speed up the process of producing communications is by putting the design and development of outbound communications into the hands of business users. However, the content produced must be tightly and centrally managed because a failure to do this can also result in the propagation of errors, inefficiency, and increased non-compliance risk.

If content creation is left entirely in the hands of business users without any pre-built design templates or guidelines to provide information on how communications should be structured, then it is difficult, if not impossible, to ensure that all communications are consistent in their look and feel. Business users can also waste a great deal of time attempting to achieve the appropriate brand image. In addition, legally required content could fail to appear in the communication, which might result in penalties being levied against the organization resulting in negative publicity and brand damage.

Finally, miscommunications also carry the real risk of non-compliance through the inability to control content created by individual users. Unless the communications creation process is tightly controlled and monitored, managers might not be aware of the content of communications that leave the organization, and this content could easily be non-compliant. In many cases the production of non-compliant content is not deliberate on the part of employees, but rather a result of a lack of knowledge of the content that should be produced. This is something that can easily be rectified through additional user training. However, managers need to be aware that it is occurring in order to solve the problem and reduce the risk of non-compliant material.

**Issues with the IT infrastructure can arise**

Corporate data and content is stored in a number of different repositories across the enterprise. Traditionally these have been siloed and implemented on a departmental basis and therefore owned by different parts of the organization. There has typically been little or no integration between these disparate systems. As a result users often have to re-key data into each system, which can be an error-prone process. Although there is clearly a need to integrate many of these siloed repositories, there is still a culture of individual ownership over systems and their associated data, and this is something that organizations need to address to implement efficient processes that take data from a variety of systems.

A lack of integration between systems can result in users having to work from within one system such as an editing environment to create communications and then access and re-key data from different systems, a process that is time-consuming and costly as well as error-prone. For example, a user dealing with a customer complaint might need to access information stored in several repositories to build a complete picture of the organization's interactions with the customer to appropriately handle and resolve the complaint.

**User-created templates do not meet corporate-branding standards**

More often than not business users will create their own templates containing macros that do not meet corporate-branding standards. Every time software upgrades are implemented, these macro-driven templates have to be recreated. In addition, a lack of integration between web forms used for data-gathering, and back-end systems results in users re-keying data at additional cost and with a risk of errors.

**Misalignment of content with business objectives means missed marketing opportunities**

Different departments in an organization have their own expectations of what information should be communicated to customers. From a finance perspective, customers need to receive statements and other information about their accounts, but from a marketing perspective, communicating information about additional services, special offers, and other items that could increase the value of the interaction with the customer and generate additional revenues is more important. Above all, communications need to be accurate, relevant, and timely. However, organizations should guard against bombarding the customer with too much information or mixed messages. Excessive communications from different departments in a company that do not communicate with one another will at the very least result in customers failing to read the communications, resulting in missed business opportunities. Worse still, it might annoy the customer, resulting in the risk of churn. In addition, organizations often miss opportunities to personalize content based on information they know about a person and their circumstances in order to exploit cross-sell and up-sell opportunities.

Gathering information from customers can also be problematic. Many organizations now use self-service initiatives to allow customers or citizens to complete forms online. However, creating templates for official forms is usually a task that needs to be undertaken by IT, particularly as organizations often attempt to replicate official forms online, which can be time-consuming if the form is complex and contains branding elements. This can make forms more difficult for users to complete because they have to navigate through unnecessary elements. Yet there is no reason why an online form has to replicate the official form it is gathering information for, and the advantages of a simplified form are that it can be created speedily by business rather than IT users, and it can be filled in more easily by customers.

**The cost of content creation can reduce profit margins**

The cost of creating personalized documents is high if individual employees have to create documents from scratch every time communications need to be sent to customers, or users spend long periods of time searching for similar documents to base their communications on. There can also be a high cost attached to this process if templates are created on an ad hoc basis every time a document is created, particularly if users have to create their own templates.

**CURRENT TRENDS IN INFORMATION MANAGEMENT**

Most organizations that need to create documents for mass distribution have already invested in ECM platforms to manage unstructured information or content. Although there are a number of technologies that can help them to manage the lifecycle of content within the ECM platform, these have not been designed to manage document generation processes.

**ECM is an effective mechanism for managing individual pieces of content**

Document management is a core component of an ECM platform because it provides the ability to create and manage documents. It includes check-in and check-out facilities, version control, and the ability to put documents through review processes, but it does not include the ability to easily create rules to manage the creation and distribution through multiple channels of documents for bulk communications that contain both standard and personalized elements. Although web content management systems separate the content from the presentation layer, document management systems are not usually designed to work in this way and their strength lies in the ability to create individual documents using environments that users are familiar with.

---

### **Transactional content management enables content-centric processes**

Organizations can take advantage of the transactional content management (TCM) or case management capabilities that many ECM vendors offer. TCM combines ECM functions and business process management (BPM)-created workflows to manage both transactional data and unstructured content. ECM vendors have created content-centric process-driven applications that sit on top of the ECM platform and perform specific tasks by using the BPM capabilities within their platforms. These include horizontal tasks such as invoice processing and purchase orders as well as vertical solutions such as claims handling in the insurance industry. A popular application is the digital mailroom, which allows organizations to scan and process paper-based documents containing information that might be required for customer communications. Producing customer communications may be part of a larger process that has been created using TCM. These processes help to manage the lifecycle of content, but deal largely with existing content that has been created outside of the ECM platform, supported by documents that may have been created by the document-management capabilities. However, the TCM functionality in itself is not usually concerned with content generation.

### **ECM offers capabilities that support the lifecycle of one-off pieces of content**

Digital asset management (DAM), a component of many ECM platforms, allows organizations to manage images such as photographs and graphics such as a company logo or other branding items in a dedicated repository. DAM has been designed to allow easy access to images that can be easily resized and used as required. These images are increasingly being used in mass and ad hoc personalized communications.

Many ECM vendors also offer web content management (WCM), which allows organizations to create and publish content for customers via websites. Many sites provide online forms for users to complete, such as application forms that might have been created using a WCM system even though they are not optimized for this task. Although it provides content creation facilities, and the presentation layer is separated from the content, WCM is not optimized for bulk communications that need to be provided for customers via multiple channels including the Web.

Although ECM platforms include a search capability, this is often a cut-down version of an enterprise search engine, and only provides the ability to search content repositories. Many organizations have implemented an enterprise search engine that enables users to search across multiple repositories, allowing them to bring together information and data from a variety of sources that are required for customer communications.

Information rights management (IRM) or digital rights management (DRM) are available in some ECM platforms. These provide the ability to protect documents by ensuring they are viewed only by the person for whom they are intended. This is an important capability where sensitive information (such as statements containing personal details) is communicated to individuals via the Web.

All of these capabilities support the lifecycle of documents, but they are not optimized for bulk and ad hoc communications. Although some ECM vendors are beginning to move into this area through the acquisition of niche vendors, document generation is an area that is missing from most ECM platforms and it is this capability that has been addressed by the specialist document generation vendors.

## **DOCUMENT GENERATION SOLUTIONS**

Document generation tools enable organizations to easily create and manage mass communications and ad hoc personalized documents. This functionality is still usually provided by niche vendors, rather than offered as part of an ECM platform. However, some of the larger vendors are beginning to add these capabilities to their portfolios, typically through the acquisition of a niche content generation vendor. Document generation tools are template-driven and separate the content from the presentation layer in a similar way to a web content management solution.

By contrast, document management systems are focused on enabling users to create content using editing environments that they are familiar with and who are not concerned with the presentation of the content.

**Document generation tools enable business users to design and create mass communications**

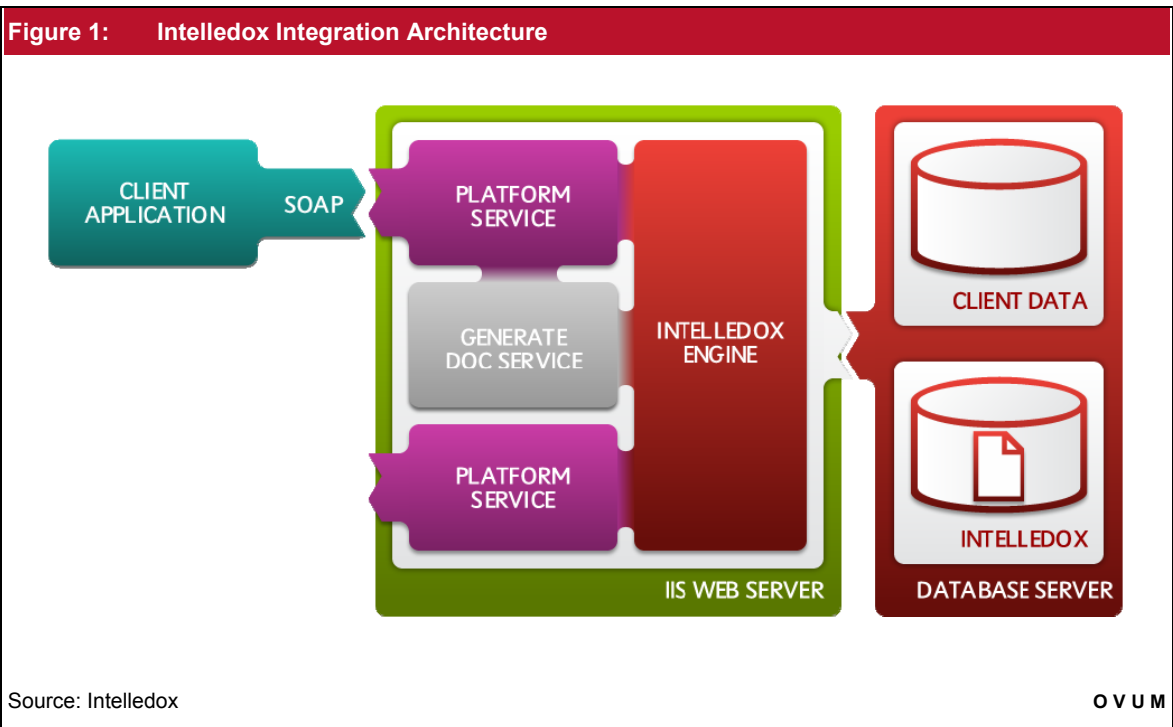
Document-generation solutions manage the end-to-end process of creating and delivering personalized customer communications. They address the problem of slow delivery by enabling business users, rather than IT specialists, to create professional quality communications and correspondence, which can range from one-off personalized documents such as driving license correspondence, employment contracts, complaints handling, equipment user manuals, or other user-driven content which are dynamically created and sent to individual business customers, through to very large batch mailings such as statements.

A document generation solution must support agile marketing, particularly in a difficult economic climate, in order to take advantage of known attributes of a customer by dynamically generating documents or correspondence that contain additional information or offers relevant to the customer. In addition, organizations must recognize that in an increasingly competitive landscape, customers are much more discerning and able to dictate the format of communications. Therefore organizations need to be able to deliver communications via multiple channels on-demand. This is something that document creation solutions must support. Popular communications channels include email, the Web, mobile devices, web feeds, or social networking, as well as the traditional printed format. In addition, there are emerging channels such as VoiceML and RSS/Atom that also need to be supported.

It should also be applicable to ad hoc one-off communications where there may be a repetitive content element, particularly if there is a requirement to tightly control content for compliance or disclosure purposes, and where there is a desire for strong information governance.

Another important area is in the creation of standard documents such as contracts or driving license correspondence. A big advantage in a document creation solution is the ability to create context-aware content that allows content to be created dynamically in response to customer or citizen requests.

**Document creation solutions must provide integration capabilities**



Integration with business applications and content management systems is an important element of a document creation solution because it enables content and data to be easily brought together from a variety of systems to create communications. This eliminates problems caused by lack of communication between individual data silos. Users can use content that has already been created by the content management system as well as new content. Web content management systems can also be used as a delivery channel for communications.

This integration extends not only to content repositories but also enterprise workflow and BPM systems, as well as other content-centric business applications. The goal is to deliver a single integrated solution for both interactive real-time and batch communications. This leaves IT staff to deal with the data management aspects of mass communications, while business users are able to create templates and populate them with content and business rules to create documents and other communications.

The user environment has to be designed with ease-of-use in mind to enable business users to easily and speedily create content, if necessary using templates that have already been created. Document template migration should also be supported to future-proof document templates against software upgrades, eliminating the typical internally managed macro-based approaches that can be compromised by software version upgrades.

However, an area that document-generation forms typically ignore is the ability to create forms to enable the dynamic publication of a document as an outward-facing web form, allowing customers or citizens to maintain an electronic relationship with an enterprise or agency. This is particularly relevant in the public sector where there is a need to support constituent self-service strategies.

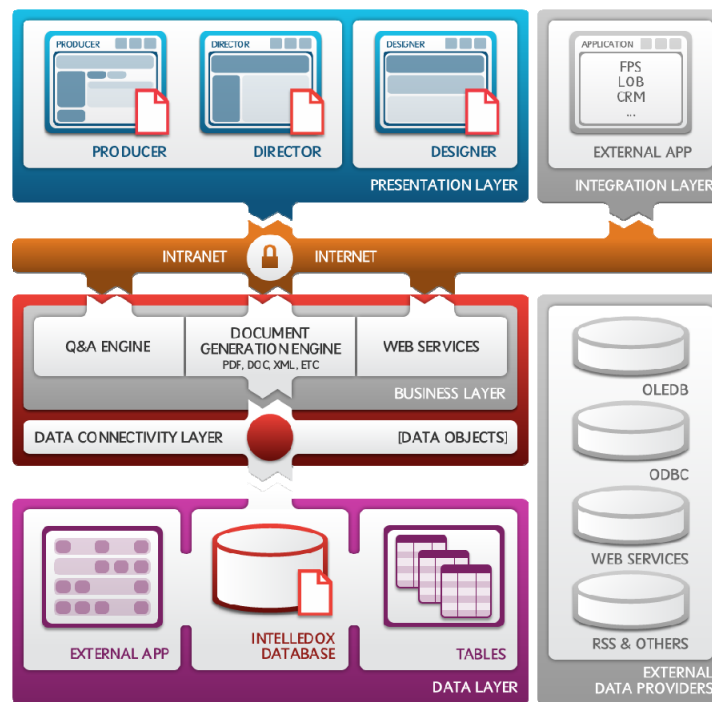
## **INTELLEDOX INTELLIGENT DOCUMENT CREATION**

Intelledox provides a document creation and management solution that enables organizations to create both one-off ad hoc documents such as equipment user manuals, contract, or procurement agreements, and bulk communications such as statements or bills. Examples of correspondence the solution has been designed to create include contract generation, employment contract generation, statements of financial advice, pilot and ground-crew licensing correspondence, citizen driver's license correspondence, dynamic generation of equipment user manuals, complaints case management, and grants management.

Intelledox is a web-based system designed to be easy for business users to work with, fast to deploy, and cost-effective, which allows organizations to reduce the time to market for communications. It also enables users to locate and reuse content, which increases productivity, reduces duplication, and eliminates errors that result from duplicated work. Intelledox does not see this product replacing an ECM platform, but rather positions it as a focused product that sits at the front end of a content management system to specifically provide tools for document creation, and a repository for document assembly components and business rules.

By managing the control of corporate content down to the granularity of individual portions of documents from a single point of administration, organizations are able to ensure that all document templates use centrally approved and managed content that is accurate and appropriate, which virtually eliminates the risk of non-compliance. In addition, Intelledox uses Active Directory for its rights and access management, which enables centralized control of access to content as well as the facility for auditing and reporting to provide a framework for information and document governance.

**Figure 2: intelledox High-Level Platform Architecture**



Source: Intelledox

OVUM

Intelledox is built on Microsoft.NET and integrates with common document and records management solutions including EMC Documentum, HP TRIM, and Microsoft SharePoint. There is also integration with Compuware ChangePoint for end-to-end case management. Intelledox is capable of creating Word, PDF, XML, Postscript, and email-formatted documents, and works with most formats used to generate an electronic form. Using its rules-based approach to achieve consistent document branding as well as approved customization and personalization, Intelledox Enterprise provides a scalable dynamic server-side engine for high-volume document generation, with proven scalability of over 100,000 documents per hour.

**Business rules help speed up document creation**

The solution has been designed to automate the document generation process, automate business rules, enable the dynamic publication of forms to the Web, and to make the document template creation process flexible and easy to use at the point of delivery at the same time as providing a consistent, secure, and safe business offering.

Intelledox enables the automation of complex business rules that define the inter-relationships across the data items. These rules are created using an intuitive drag-and-drop web-based environment. The sets of rules are presented as a series of questions formulated at the time of design. When authorized users have a requirement to make use of an existing Intelledox template, they can use a series of questions and responses to populate the document and confirm the attributes that will define the document’s form factor, such as whether it should be published as a PDF or Word document, or whether it should be routed via a printer or email channel. The ease with which these complex rules are created means that IT does not need to be involved in the process.

Business users can formulate and use rules without having specific knowledge of programming. In addition, all the documents and templates created through Intelledox are version-controlled and saved in a common central repository with appropriate access controls using existing LDAP access management technology. This allows organizations to ensure that all of their content adheres to branding standards and is compliant.

#### **Personalized content is an important element of document creation**

Intelledox is a context-aware solution, using information about the customer to generate personalized content for a variety of business purposes such as exploiting cross-sell and up-sell opportunities. It is ideal for any company that has a requirement to generate and update large volumes of document content, such as bills, contracts, agreements, or periodic documents, while at the same time ensuring that the output conforms to pre-defined standards, such as text, layout, and branding common and consistent to all recipients. In addition, Intelledox can be used to manage the delivery of document content as well as automate internal document generation such as contracts and agreements that are typically driven by a need for compliance.

It can be used to control the use of data items that relate directly to a billing amount or payment plan along with the personal customer details of recipients. Aligned with the direct data management approach, the fields within a set of data items for a specific recipient are interrelated. For example, the billing amount depends on the billing plan the customer subscribes to, and the itemized components in the bill could also depend on the specific parameters of the billing plan. Therefore, an Intelledox document template contains rule sets that govern the inter-relationships between the data items and the document management components that define layout and common usage scenarios. Because it is context-aware Intelledox can be used to dynamically add content such as offers or product recommendations to an existing document cycle.

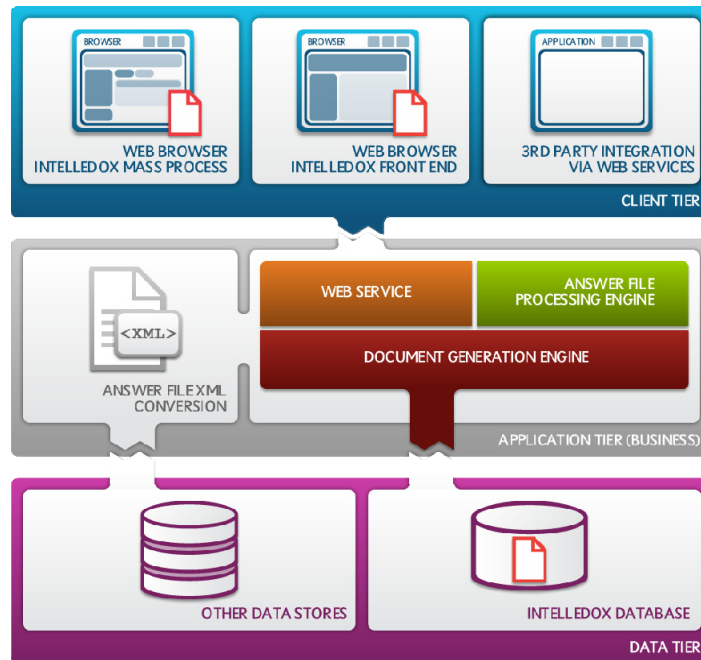
#### **Separating templates from content and business rules promotes reuse**

Separating the content generation and presentation layers allows multiple users to develop their own templates and create and manage the content. The main advantage of managing both content and layout templates separately is that while a layout template manages a document's style attributes and formatting options, the content template maintains a document's content and the logic surrounding how it is generated. The approach allows various styles to be applied to the same content template and vice-versa, promoting the reuse of both the content and templates on which they are based.

The management of rules is also separated from the layout and content, which means making a change to one document does not have an impact on others. Also because this change can be performed centrally and in real time, all downstream templates and resulting documents generated are kept updated and current at all times.

By creating and storing content in XML, Intelledox Enterprise enables the delivery of content through multiple channels including a print format such as Word or PostScript, email, the Web, PDF, web services, and RSS. Intelledox Enterprise is an open standards-based solution that provides its own Web Service API suite through which Intelledox document services can be integrated with the client organization's existing applications.

**Figure 3: Intelledox Logical Tier Structure**



Source: Intelledox

OVUM

Another feature of the functional role of the data tier are the integration capabilities that enable Intelledox Enterprise to interact with a variety of external data sources to retrieve data. Data sources supported include OLEDB/ODBC, RSS feeds, XML, and web services. Intelledox achieves connectivity to these resources by using connection strings. Access can be configured using tables or views that are exposed, and can be filtered down to the user layer according to what is relevant or appropriate to the user’s role. This allows users to use content from many different data sources.

**Web forms allow organizations to gather customer information online**

Document creation is only half of the process. Many documents originate from content provided by a customer, and in the digital age this content is increasingly created online, particularly in the public sector and insurance industry. Traditionally, web forms that allow this information to be input have mimicked the paper version of a form, which is often complicated and time-consuming to recreate online, as well as being difficult for customers to navigate. However, there is no reason to replicate the form at the point at which the user inputs the information. In contrast to most document creation solutions, Intelledox provides web forms to enable organizations to create online forms for customers and citizens to complete. The information can be entered using a simple input screen, and once complete can be displayed in the “official” form, using a template that is populated dynamically. Back-end integration to electronic document and records management systems, SharePoint, enterprise resource planning, and CRM systems enable seamless data capture.

---

## CASE STUDIES

### AXA AUSTRALIA

AXA Australia, a member of the global AXA Group, needed to simplify its document system in order to manage licensee growth and potential changes to the regulatory environment. Operating as it does in a highly regulated industry, AXA's documents must meet standards to satisfy specifications set by Australia Securities and Investments Commission in the construction and delivery of statements of advice (SoAs) and financial services guides (FSGs).

The company undertook a successful implementation of Intelledox, which was rolled out to its network of financial advisers in December 2008. By the end of February 2009, it was able to decommission the old system. Intelledox provides AXA and its network of advisers with an automated document system, enabling it to create and manage all documentation. Documents can be designed, templates managed, and legal changes updated and controlled from a central point, guaranteeing compliance. AXA is able to ensure that all SoA and FSG documents comply with formal regulations, adhere to corporate branding and style guide, and allow advisers to incorporate personal business graphics into documents. Access to Intelledox is via an online portal and financial advisers are able to customize documents for clients. Advisers use the Intelledox Wizard to capture customer data, and the online form changes dynamically, based on the answers to questions. For example, the answer yes to the question "do you have a partner?" could trigger additional questions.

Benefits of the Intelledox deployment include an improvement in document completion times (reduced on average from seven hours to 40 minutes) through the automation of business rules, the separation of the content from the presentation layer, and the reuse of templates, more efficient processes, improved content accuracy, and full usage metrics.

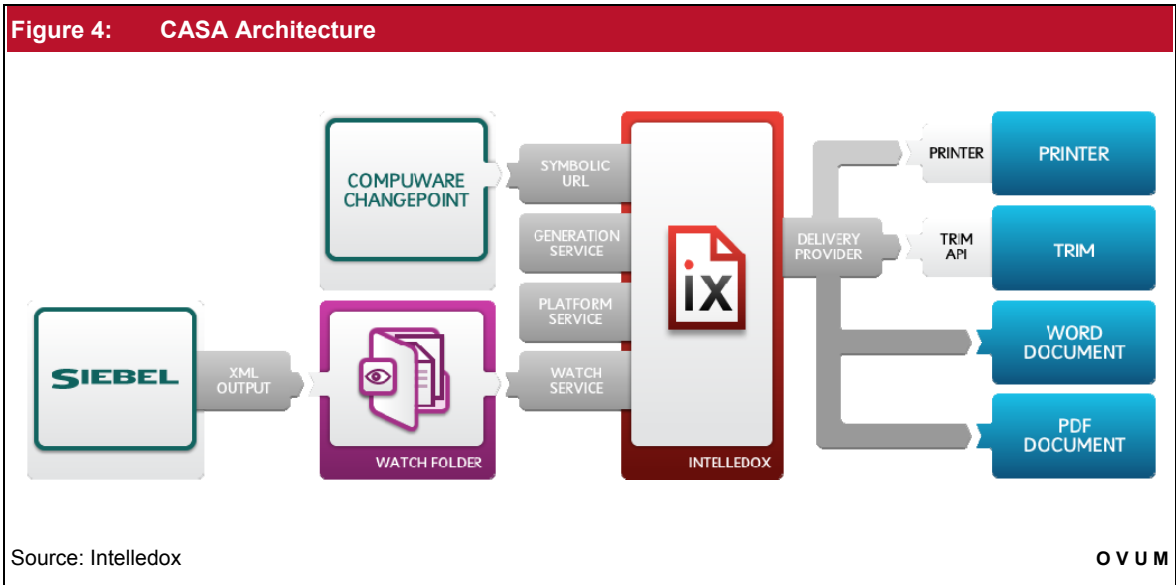
### CASA

The Civil Aviation Safety Authority (CASA) was created in 1995 as the federal government regulator of the civil aviation industry in Australia with responsibility for safety, oversight, and licensing of commercial operators, aircraft, pilots, and licensed engineers. The types of documents it manages include flight crew licensing procedures manuals, certification correspondence, and manuals relating to aircraft registration, flight operations, flight crew licensing, and aerodromes and airspace.

These documents need updating on a regular basis, and the creation of new documents can mean many days document reviewing and editing. CASA is undertaking an IT transformation program and required a document assembly solution that would support growing business requirements and improve return on investment. It selected Intelledox as a core part of the platform, replacing a proprietary code-driven template solution that required specialist programming requirements and took a long time to implement and release changes to document templates.

Intelledox has automated several business processes at CASA, which leverage the Compuware ChangePoint workflow solution. These are:

1. Pilot and aircrew licensing, which automated the licensing workflow, including the dynamic generation of related correspondence. It has full integration with TRIM, and interoperability with Siebel.
2. An alcohol and other drugs program, which deals with the automation of workflow, including the dynamic generation of related correspondence with full integration with TRIM, and interoperability with Siebel.
3. Implementing gateway, which is an Industry-facing web-service delivery channel to enable CASA customers to transact online.



Intelledox enables business users to change document templates using familiar tools such as MS Word, and integrate with data published by IT from line-of-business systems without having to write any code. Corporate data is drawn from a number of line-of-business systems including records management, CRM, and a human workflow and resource management engine to populate required document fields. Documents can be delivered to users in the format of their choice. With the implementation of Intelledox, the document creation process has been centralized, productivity has been increased, there has been a dramatic increase in the accuracy of documents, and security has improved as access to CASA document templates is permission-driven.

## SYDNEY WATER

Sydney Water provides drinking water, recycled water, waste-water services, and some storm-water services to more than 4 million people in Sydney, Illawarra, and the Blue Mountains. Its “Every Drop Counts” (EDC) business program offers advice to help businesses cut their water use. EDC involves the production of water efficiency and water management publications, which can be downloaded from the Internet. Sydney Water plans to work with all customer segments on a one-to-many basis and deliver customized information to cater for customers’ specific requirements, via the Internet. Each type of water user has different requirements and static publications contain a high level of content that is not relevant to everyone. They also lose their relevancy quickly, cannot be easily updated with new data and research, and have high costs of production and distribution.

The EDC program needed to be able to tailor its publications that were available online to meet the demands of an expanding customer base. Sydney Water selected Intelledox as its document creation system to deliver the “Customised Water Management Publication Tool”. Users are able to dynamically create detailed and industry-specific “Best Practice Guideline for Water Efficiency” publications that are tailored to their requirements. In addition, Sydney Water has access to metrics that record usage and publication downloads per industry type and is able to analyze the data to identify market sectors that are not participating in the program.

RECOMMENDATIONS

Organizations that can identify with the problems outlined in this White Paper should consider implementing a document creation solution. This tool should not necessarily replace an ECM platform, but should work alongside it to support the creation of mass and ad hoc communications, something that is not handled efficiently by most ECM platforms.

Careful and adequate planning is the key to success. Pre-deployment tasks that must be undertaken include examining and understanding how communications are currently created and how the process can be simplified with a document creation solution by talking to the users that create communications and finding out what their pain points are, and how they believe the process can be improved. The sources that data comes from to create communications to ensure that the solution selected has integration points into those sources should also be addressed. If the information is to come directly from the customer, then the facility for them to enter information via the Web should be available through a simple to use and navigate input screen. How the document creation system will work alongside the ECM platform should also be considered. For example, if communications must be declared as records then integration with the records management capability is required, or if existing content stored in the ECM repository is required then this should be accessible.

The document generation application must be flexible to accommodate the fact that not all communication content is the same but has different requirements in terms of accuracy, consistency, and delivery timelines. Common templates should be created as part of the implementation process wherever possible to speed up the document creation process and ensure consistent branding across all communications. This will provide benefits in terms of increased productivity and efficiency as well as ensuring that content is compliant. Implementing the appropriate system allows business users, rather than IT, to create and customize documents, which reduces the time to market from hours to minutes, allows organizations to use consistent branding in templates that are future-proofed against software updates, and allows web forms to be created to gather information from customers or citizens in a straightforward way.

Table 1: Contact Details	
<p><b>Intelledox Pty Ltd</b>                      Canberra, Australia                      Tel: +61 2 6280 6244                      Fax: +61 2 6280 6244                      sales@intelledox.com                      www.intelledox.com</p>	<p><b>Intelledox Asia Pte Ltd</b>                      Singapore                      Tel: +65 6603 9237                      Fax: +65 6886 9333                      sales@intelledox.com                      www.intelledox.com</p>
Source: Intelledox	OVUM

Ovum's Knowledge Centers are new premium services offering the entire suite of Ovum information in fully interactive formats. To find out more about Knowledge Centers and our research, contact us:

**Ovum Europe**  
 119 Farringdon Road  
 London, EC1R 3DA  
 United Kingdom  
 t: +44 (0)20 7551 9000  
 f: +44 (0)20 7551 9090/1  
 e: info@ovum.com

**Ovum Australia**  
 Level 5, 459 Little Collins Street  
 Melbourne 3000  
 Australia  
 t: +61 (0)3 9601 6700  
 f: +61 (0)3 9670 8300  
 e: info@ovum.com

**Ovum New York**  
 245 Fifth Avenue, 4th Floor  
 New York, NY 10016  
 United States  
 t: +1 212 652 5302  
 f: +1 212 202 4684  
 e: info@ovum.com

All Rights Reserved

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior permission of the publisher, Ovum Europe Limited. Whilst every care is taken to ensure the accuracy of the information contained in this material, the facts, estimates and opinions stated are based on information and sources which, while we believe them to be reliable, are not guaranteed. In particular, it should not be relied upon as the sole source of reference in relation to the subject matter. No liability can be accepted by Ovum Europe Limited, its directors or employees for any loss occasioned to any person or entity acting or failing to act as a result of anything contained in or omitted from the content of this material, or our conclusions as stated. The findings are Ovum's current opinions; they are subject to change without notice. Ovum has no obligation to update or amend the research or to let anyone know if our opinions change materially.

© Ovum. Unauthorised reproduction prohibited

This report is a licensed product and is not to be reproduced without prior permission.