



SUCCESS STORY FOR SOFTWARE

Personnel Concepts

Situation

Personnel Concepts receives the bulk of its orders via an order card that accompanies the tens of millions of direct mailers it sends to customers and prospects each year. When the completed orders were received at Personnel Concepts, the envelopes were opened and orders were manually entered into the legacy system called Mail Order Manager (M.O.M.). While manual order entry was adequate for eight months out of the year, during the four peak order months of December – March, the company had to significantly increase its order entry staff, including adding a second shift of temporary workers, to accommodate the increased volume. Even with bolstered manpower, the company struggled with issues related to manual processes, such as order backlogs, overtime costs, training and seating issues, and human error.

Challenge

In 2008, Steve Slezak, Director of Quality Management - Direct Marketing Americas at Personnel Concepts set out to modernize the company's order entry process with an automated information capture solution. Slezak explained, "We wanted to use technology as a reliable platform going forward -- one that could easily handle peak volumes and resolve resource issues, and that would be sustainable if the company doubled or tripled in size." Slezak sought the expertise of long-time Kofax partner, Portford Solutions, to help identify, build and implement the right capture-driven technology solution.

Solution

Working with Bradley Grell and Bruce Bolton, founding partner of Portford Solutions, the Personnel Concepts team defined the following basic requirements for their new automated order capture/order entry solution:



Personnel Concepts pioneered the labor law and health and safety compliance poster industry in 1989 with its All-On-One approach. Acquired by Brady Corporation (NYSE: BRC) in 2006 it also led the industry in developing a skilled, knowledgeable and experienced research team that keeps constant vigil on government regulatory changes and updates clients on changing labor law and OSHA requirements. Personnel Concepts' 1.2 million business customers rely on the company to protect them from government fines, employee lawsuits and other costly consequences associated with non-compliance.

Products in Use:

- ◆ Kofax Transformation™
- ◆ Kofax Capture™

Speed and Capacity

- ◆ Ability to handle 2500+ orders daily with a reduced headcount and no backlog

Flexibility

- ◆ Capable of processing varied forms without disrupting operations

Accuracy

- ◆ Proven ability to accurately read all document types including handwritten information, enabling fast and complete order verification

Performance

- ◆ An easy-to-use solution that improves efficiency and operates without problems – no IT skills required

Scalability

- ◆ A sustainable process and solution that would continue to be viable if the company expands rapidly

In August of 2008 when Slezak initially approached Portford Solutions, he had an aggressive goal in mind. He wanted a production solution in place, and his team trained, before the peak order cycle began in December. He also wanted assurance that the order entry volume that required 12 staffers in the past could be handled by no more than 1.5 full time employees with the new solution in place. Bolton, confident in Portford Solutions' ability to define and customize a winning solution, provided Slezak with a "success clause" that included a money-back guarantee if his primary objectives weren't met.

The initial evaluation cycle was accelerated in order to achieve the timing objective Slezak set forth. Portford Solutions presented three potential platforms and Kofax quickly became the frontrunner for its proven capabilities.

Post-evaluation, Portford Solutions recommended a customized solution based on the Kofax Capture™ software platform and Kofax Transformation™. According to Bolton, "Kofax was a more mature solution, well-proven with thousands of customers in production. We felt very comfortable recommending Kofax to Personnel Concepts."

Before the decision could be finalized, Portford Solutions demonstrated the Kofax solution to the Personnel Concepts team. Personnel Concepts' head of IT evaluated the architecture on how well it fit within the company's existing environment and operations team members assessed how usable the solution would be on the floor.

"Kofax was the perfect solution at the right time for Personnel Concepts ... [it] resulted in such measurable process improvements and cost savings that our Ontario office has gained global exposure as a technology innovator within the Brady Corporation. It was a win for all."

Mark-Anthony Nel, Manager Business Support System, MBSA

"We all knew that because the solution would displace some staffers, it had a very high bar to clear. It had to work." Because there was no room for error, the support for the Kofax solution over any other was unanimous. Portford Solutions immediately created a detailed implementation plan that Personnel Concepts signed off on. Included in that plan was some customization and the very important "success clause."

Within four months of their initial meetings with Portford Solutions, Personnel Concepts had a new, Kofax-based order entry solution in full production, just before their order volume increased by 130% during peak season. Additionally, Portford Solutions posted an engineer on site to ensure the Personnel Concepts staffers didn't encounter any problems as they ramped up on their own. "From the outset, orders were processed same day in, same day out, with no carryover and no backlog," said Slezak. "It was well executed."

Results

Today, 1.5 full time employees are able to routinely handle the same peak volume that formerly required 12 staffers. The process now includes batching order cards into stacks of 50, then scanning them into the Kofax Capture system. The order entry staff then views and validates orders on the highly user-friendly, 25-field order screen which was customized for them by Portford Solutions.

"The accuracy and reliability of our new solution is extremely high," noted Slezak. Once an order is validated, it is released and a CSV file is created, which then automatically is uploaded into Personnel Concepts' main system where the order is built. The Sales team then calls every customer to verify the information on their order.

Because the outbound Sales team is now able to receive their orders sooner and view an image of the actual order card for accuracy, they are perceived as more responsive, improving customer satisfaction.

“Kofax was the perfect solution at the right time for Personnel Concepts,” commented Slezak. “Teaming with Portford Solutions to customize and implement our Kofax solution

resulted in such measurable process improvements and cost savings that our Ontario office has gained global exposure as a technology innovator within the Brady Corporation. It was a win for all.”

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