EPHESOFT

Automation Seen Clearly with Ephesoft Platform

A large marketing services company specializes in the development, management and administration of channel marketing programs for their many customers. The company serves the trade promotion industry by professionally developing, managing and supporting co-operative advertising, trade promotion and sales incentive programs that help customers meet their corporate goals and help drive sales. They also monitor policies, programs, practices, trends and reporting in all trade sectors.

Challenge

For one of their customers in the eye lens industry, the Company would collect and process a mailed postcard-size rebate card from someone who ordered a pair of glasses. The number of rebates were substantial and required a huge amount of data entry. Each for had to be manually entered and processed into another system. Prior to implementing the solution in 2016, the Company processed 450,000 claims per year. To manually enter the data, they employed 15 data entry staff, 15 audit staff and 1 scanner operator, which is 31 employees in total.

The Company knew there was a more efficient way and turned to an Ephesoft solution partner for a solution to help automate their document capture processes for this customers and others.

Customer
Large Marketing Services Company

Industry
Marketing Services and BPO

Application
Form Automation

Results
- Reduced headcount by 55% from 31 to 14 staff
- Saved approximately $516,000 per year in labor
- ROI achieved in 6 months
- Increased accuracy and reduced processing time

Solution

On the front end, the Company used scanners to digitize the rebate forms to then be fed into Ephesoft Transact. A batch class was created to process rebate cards for their eye lens customer. When eyeglasses were sold, the customer would handwrite the Name, Address, Date of Birth, and other personal information along with the type of eyeglasses they selected. The Ephesoft batch class used RecoStar to process the form and capture the data. Fuzzy database lookup was also implemented and used the United States Post Office database for City, State and Zip Code. This gave a huge boost to Intelligent Character Reading (IC) and raised the level of recognition and accuracy significantly.

The Company saw enormous efficiency gains. Shortly after Ephesoft was installed, their direct labor was reduced by two thirds, going down from 15 data entry staff to only 5 people in that role. Additionally, the audit team was reduced by 47%, reducing headcount from 15 to 8 people. The team was now 14 people, with an overall reduction of 55% in labor costs. In terms of actual savings, the labor reduction accounted for about $43,000 per month, or $516,000 per year. The Company achieved ROI in less than 6 months. In summary, the rebate cards are now easily and accurately classified and exported, which dramatically reduced processing time and cut labor costs.