

# EngageOne™ Interactive

An Advanced Interactive Technology Solution  
for a New Era of Enterprise Communications

# Enterprise Customer Communication Management

Companies send many types of document output, varying in format, content and delivery channel – print, fax, Web, email and SMS – to conduct hundreds of daily business transactions. Now enterprises require even faster, more intelligent, personal customer interaction, and with greater control, to build lasting relationships and increase profits.

These output types include:

## High Volume

Structured documents, such as statements and bills, are scheduled for production, consistently formatted and delivered to large numbers of customers. Beginning with our flagship product DOC1® Software, Pitney Bowes Business Insight has been a leader in traditional document composition and output for a number of years.

## On-Demand

Communications are delivered when needed, with zero human interaction. Customer-oriented events – via Web, fax, phone or transaction system – trigger on-demand output such as quotes or proposals. Businesses worldwide are leveraging Pitney Bowes Business Insight's on-demand solution to help close business on the spot.

## Interactive

Individualised, ad-hoc communications, such as insurance claims or credit card disputes, require real-time information and human touch in order to complete. Pitney Bowes Business Insight's solution, EngageOne™ Interactive, offers an advanced technology solution for managing interactive content.

The collage features several overlapping documents:

- GRNCOM Bill:** A utility bill for GRN Communications, dated Sep 26, 2008. It includes account information for MARCO ANDRETTI and a payment table showing a previous balance of \$11.89 and a new charge of \$1.26, totaling \$12.01 due by Sep 30, 2008. It also includes an account summary and promotional offers like 'Save \$60' and 'Get a FREE Standard Modem'.
- GRN Insurance Policy:** A policy document for Linda O'Hagan, subscriber ID 561231212. It details the 'GRN Insurance Advantage! Manage Care Plan' and includes a 'Welcome to GRN Insurance' message. It also mentions 'Employee Group Services Provided through' Pitney Bowes.
- GRN ENERGY Credit Card Notice:** A notice regarding a pending credit card expiration for Jack Laurence. It states the card is set to expire on 07-31-2007 and provides contact information for GRN ENERGY at 5555 MAIN STREET, CITY, STATE 12345-4789.

The above example documents and other documents shown throughout are completely fictitious and are intended for illustrative purposes only. GRN (Finance, Insurance, Utility, etc.), the individual names and account information contained in these statements have been made up by Pitney Bowes Business Insight. Any resemblance to real companies, people or accounts is strictly a coincidence.

As the pioneer in Customer Communication Management (CCM), Pitney Bowes Business Insight provides businesses worldwide with state of the art technology, knowledge and experience needed to create the next generation enterprise communications platform.



## EngageOne Interactive for Real-Time Communications

- Generate real-time interactive communications in an efficient, controlled manner
- Ensure branding and compliance automatically
- Tailor individual communications to the specific needs of the interaction
- Deliver, instantaneously, through the customer's preferred delivery channel
- Improve business process automation with built-in document management, workflow, Web services and optional archive for easy integration in existing systems

### Meeting a Growing Interactive Business Need

More and more companies are faced with the task of optimising the preparation of interactive correspondence, negotiated documents and other communications. Typically created in Microsoft® Word, these communications are error-prone and not controlled. Front-line users should be able to directly insert customer-based information into existing, standardised documents with minimal time, effort and risk for error.

Today, companies, regardless of industry, require interactive solutions to meet the growing demand from customers and business partners. Each industry experiences its own, unique set of challenges.

- **Insurance Agencies** – handling claims, policy holder correspondence and underwriting communications
- **Financial Services** – processing credit card and mortgage applications
- **Government Agencies** – processing various tax and benefit documents
- **Telecommunications and Energy Companies** – providing customer assistance through call centers

### EngageOne Interactive Applications

Businesses can use EngageOne Interactive for interactive communications such as correspondence, new business applications and negotiated documents and proposals, including:

#### Insurance

- Claims correspondence such as denial, exclusion and subrogation letters
- Policyholder services such as policy changes, renewals and quotes
- Underwriting information requests

#### Financial Services

- Credit card dispute letters
- Loan origination correspondence
- Confirmation notices

#### Government

- Taxation letters
- Workers compensation letters

#### Telecommunications

- Customer service communications

# Interactive Correspondence Challenges

For many businesses, creating interactive correspondence is not new. However, the actual process of creating the correspondence can be a difficult and expensive undertaking. Costs and errors increase whenever the human element is introduced to the document process.

Interactive documents require users to make decisions and provide information as the document is unfolding. Documents may be completed during the initial user interaction, or they may be worked on over a longer period of time, and even collaborated on by multiple users. Often, the documents require review and approval before they are delivered to the intended recipient.

Many companies prepare interactive documents using Microsoft® Word templates or via expensive host applications. This practice often results in confusion with hundreds of templates, created by multiple users, stored in different locations. Without centralised management and administration, it is nearly impossible to keep templates up-to-date and ensure branding and compliance.

In addition, this approach requires in-depth integration into CRM, ERP or ECM systems. The complexity of such solutions is always associated with high implementation and maintenance expenses.

# Agility, Flexibility and Control Beyond Other Solutions

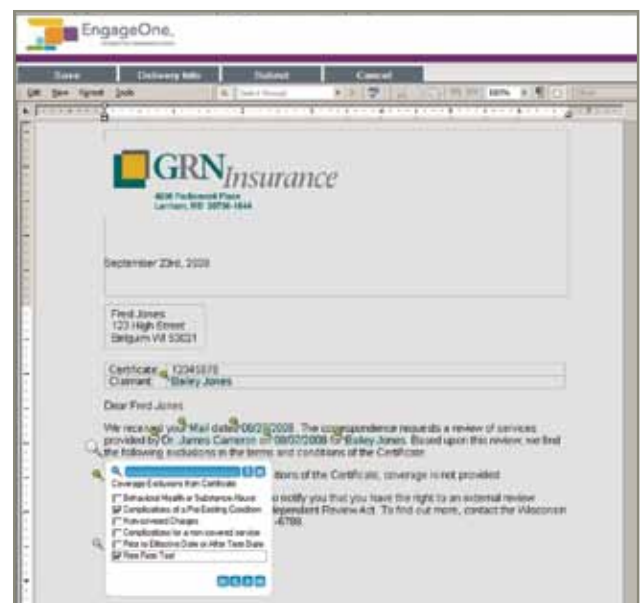
EngageOne Interactive from Pitney Bowes Business Insight is a comprehensive solution for interactive communications, designed to overcome challenges typically found in traditional systems. EngageOne Interactive ensures a highly productive, accurate and personal interaction – enterprise-wide – each and every time. With built-in document management and approval workflows and an optional document archive, business transactions are managed with maximum speed, control and compliance. Business users will love it, IT departments will rest at ease, customers will remain loyal and, most importantly, your business will thrive.

# Control Content and Design Documents on the Canvas

Think about the great masters. Now, imagine your business users creating interactive communications by simply designing 'on the canvas.' Unlike other solutions, EngageOne Interactive offers template designers – your business users – a single controlled WYSIWYG design environment for manipulating and creating content, styles and layouts.

To maintain corporate identity, designers define fonts, colors and other formatting functions directly in the templates. Consistent branding and style is enforced by storing templates in a shared repository.

All communications are managed by the business user designers, allowing the creation of pre-defined templates with optional and protected content, shared objects and interactive data prompts. Employing this user managed content system boosts productivity and accuracy for your business users. Document interactivity is previewed and tested on the canvas to ensure quality and accuracy. Data prompting is tied directly to the template, ensuring templates stay in-sync with data collection.



On the phone with a witness to an accident, the Claims Analyst creates a claims letter from a template. Pop-up data prompts ensure all required information is not missed and added in the right location.

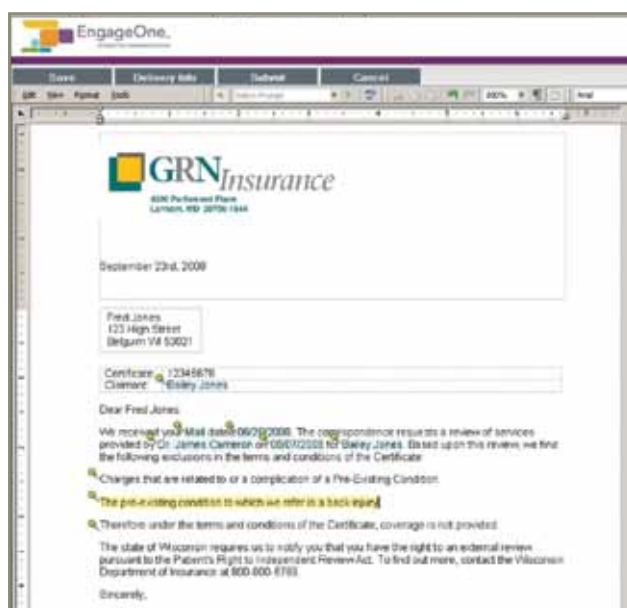
## Create and Deliver Accurate Communications Fast

EngageOne Interactive, the only solution that uses an innovative, truly interactive, Web-based WYSIWYG document editor, lets front-line users create communications in-context of the document itself. Users are prompted for information relative to the document that is immediately populated, without having to go to other locations to preview. EngageOne Interactive's interactive editor presents the document exactly as it will be printed. The intuitive user interface, based on the familiar Microsoft® Office, helps increase acceptance among employees and requires little training.

The smart combination of functions reduces the preparation time per document. More customer inquiries are handled with high quality in a shorter time frame, thereby reducing costs and increasing customer satisfaction.

## Speed Approval Processing and Collaboration

The EngageOne Interactive front office application features workflow and approval mechanisms, customer delivery preference and interactive collaboration through work queues. The interactive work queue capability streamlines efforts on documents that require close collaboration over extended time periods, ensuring content is accurate before distribution.



The completed letter identifies interactive content with visible push pins and free form text highlighted in yellow. Pre-defined formatting such as address block placement, fonts and colors ensure branding and corporate identity is maintained.

## Integrate into Business Processes and IT Infrastructure

With EngageOne Interactive, users print the interactively prepared documents directly at their workstations, forward them to central production and shipping offices, process carbon copies and distribute electronically via e-mail or SMS. This all-in-one solution saves time, material and, ultimately, money.

EngageOne Interactive can be easily integrated into your existing CRM, claims, BPM or other application services, systems and repositories, so you can manage and control interactive communications in your critical business processes.

EngageOne Interactive is the only content solution that encompasses data capture, data cleansing, document composition, stream manipulation and document archive.





## ROI for Employees and the Company

EngageOne Interactive allows in-depth management, control and compliance for all communications. Since the document is simultaneously stored in a digital company archive, all legal requirements are automatically satisfied. EngageOne Interactive enables users to verify precisely when documents were prepared or sent, and by whom. This critical step allows communication with the customer to be verified and business processes better managed.

EngageOne Interactive offers flexibility to all employees who handle corporate and customer communications. Now, the IT department can focus on what they do best, instead of spending valuable time creating document templates. Business units can quickly and efficiently prepare letters to customers that conform to the legal and internal requirements for corporate layout and company brand. The integration of interactive correspondence into the existing application landscape saves the company both time and money.

## How Does EngageOne Interactive Work?

Through its scalable architecture and ability to support a multitude of users, EngageOne Interactive makes creating and managing interactive content extraordinarily easy, simple to deploy and a breeze to integrate.

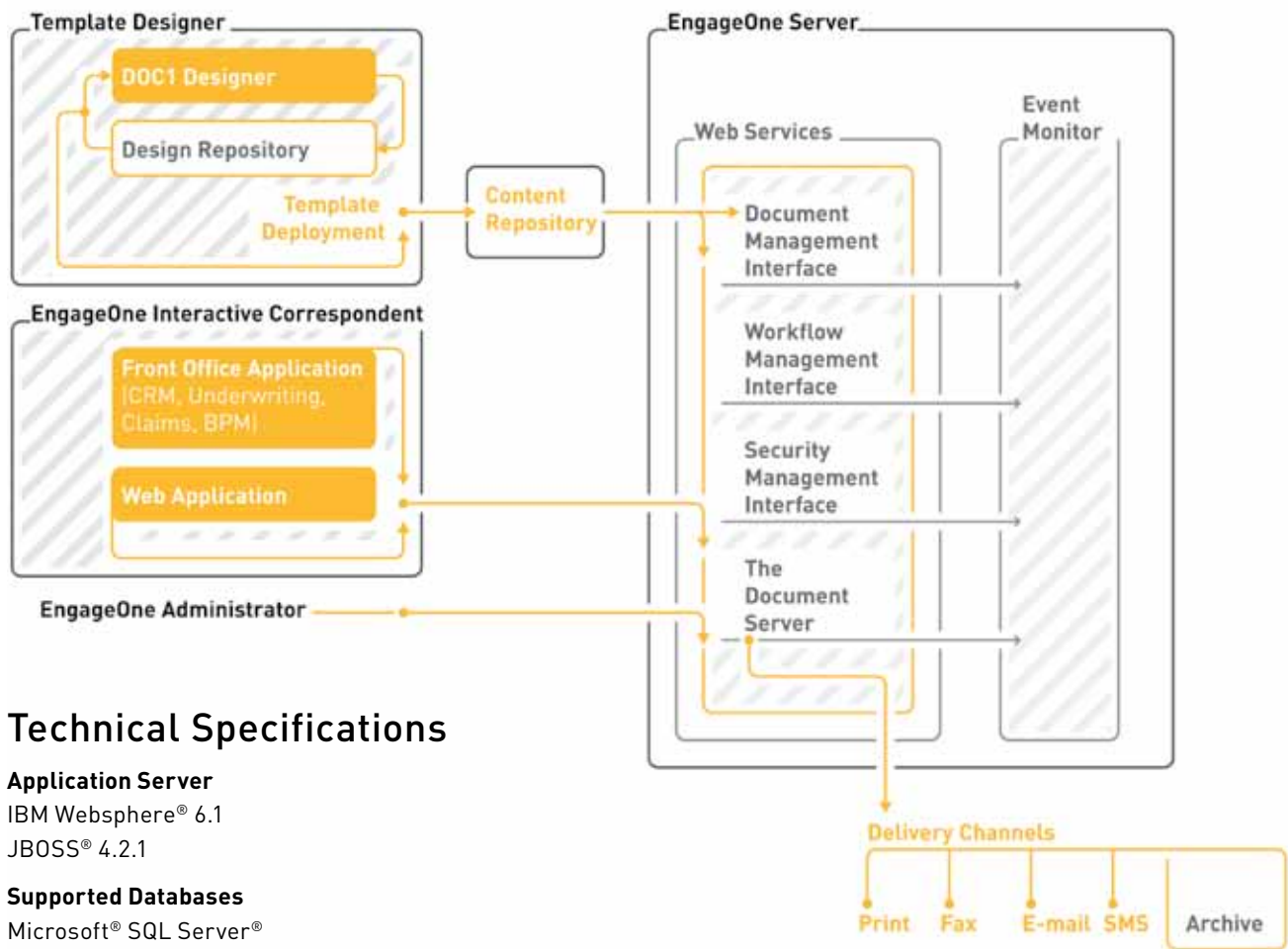
EngageOne Interactive consists of the following four components:

- **Template Designer.** Using the DOC1 Designer defines document templates, optional content objects, interactive data prompts and content protection. All templates are managed in the share content repository.
- **EngageOne Interactive Correspondent.** Through the Web-based interface, templates are made available to front office users, where they create and modify personalised documents in a controlled manner and distribute to various delivery channels.
- **EngageOne Interactive Administrator.** Manages several key functions. The Document Administrator defines template organization and workflows. The Output Administrator defines delivery channels, including managing batch jobs. The System Administrator handles general system administration, such as setting up and maintaining domains, document classes and user roles and access rights.
- **EngageOne Interactive Server.** Provides a full complement of Web services to access the features from a front-end business system. The Server centrally provides content management, workflow management and composition and output management services. The Event Monitor provides visibility into system operations including robust reporting on all aspects of the interactive document lifecycle.

***“Most enterprises investing in customer correspondence software realise their ROI within a year... This ability to realise a return helps make CCM software a good investment despite poor economic conditions.”***

Forrester Research, Inc., “The ROI of Correspondence Management” 2009

# EngageOne Interactive Architecture



## Technical Specifications

### Application Server

IBM Websphere® 6.1

JBOSS® 4.2.1

### Supported Databases

Microsoft® SQL Server®

Oracle®

### Server Operating System

Microsoft® Windows 2003 Operating System

IBM AIX® 5L

### Client Operating Requirements

Microsoft® Internet Explorer 6.x

## Your Customers Have Come to Expect a High Level of Communication Satisfaction From Your Company

Take that satisfaction to the next level with EngageOne Interactive, and open the door to faster, more personalized customer interactions, while boosting your efficiency along the way. For more information on EngageOne Interactive, call us today at **+61.2.9437.6255** or visit **www.pbinsight.com.au**.

## ASIA-PACIFIC/AUSTRALIA

Level 7  
1 Elizabeth Plaza  
North Sydney NSW 2060  
main: 61.2.9437.6255  
fax: 61.2.9439.1773  
[www.pbinsight.com.au](http://www.pbinsight.com.au)  
[pbbi.australia@pb.com](mailto:pbbi.australia@pb.com)

## UNITED STATES

One Global View  
Troy, NY 12180  
main: 518.285.6000  
800.327.8627  
[www.pbinsight.com](http://www.pbinsight.com)  
[pbbi.sales@pb.com](mailto:pbbi.sales@pb.com)

## CANADA

26 Wellington Street East  
Suite 500  
Toronto, Ontario  
M5E 1S2  
1.800.268.DATA  
[www.pbinsight.ca](http://www.pbinsight.ca)  
[pbbi.canada.sales@pb.com](mailto:pbbi.canada.sales@pb.com)

## EUROPE/UNITED KINGDOM

Minton Place, Victoria Street  
Windsor, Berkshire SL4 1EG  
United Kingdom  
+44.1753.848.200  
[www.pbinsight.co.uk](http://www.pbinsight.co.uk)  
[pbbi.europe@pb.com](mailto:pbbi.europe@pb.com)

