

Using the **hp** document router
in CRM environments.



Executive Summary:

This white paper explores how the new hp document router can help ensure the successful delivery of business-critical documents in CRM environments.

Users and systems can easily distribute information to multiple people, in different locations and in the appropriate format. The result is automated, timely and assured delivery.

Enhancing customer satisfaction with reliable document delivery.

Companies today are on a quest to build customer loyalty. By deploying customer relationship management (CRM) applications, companies are able to automate business processes and focus on improving customer interactions. The success of the entire organization—from customer service to sales and marketing groups—depends more than ever on timely, reliable access to critical customer information. And that information must be available in multiple locations via multiple output devices and formats.

At the same time, companies must also manage an increasingly complex environment of disparate communication resources. An incompatible mix of platforms, applications, legacy systems and networks must be made to work together in the midst of continual technology change. Plus, companies face a proliferation of output devices—from printers and fax machines, to e-mail systems and intranets—with no common management resource.

Enter the hp document router—an innovative server appliance that enables users to successfully deliver documents across an entire network. A plug-and-play device that captures the output from any application and then routes and tracks the output job to its final destination. And an ideal solution for output management in the CRM environment.

The need for output management in CRM environments.

To improve customer satisfaction and build loyalty, companies must ensure that all communication with, and related to, customers is streamlined and smooth. The entire organization depends on the reliable delivery of customer information. According to the Boston Research Group, IT managers estimate that 30 percent of business process failures are due to document delivery problems. Any failure in delivering business-critical documents can result in the loss of time, money and most importantly, customers.

Typically, companies deploy CRM applications for customer/call center support, sales force automation (SFA) and marketing automation. But to receive the maximum benefit of these applications, critical business documents must be successfully delivered to multiple people in multiple locations and formats. For example, customer problem reports generate internal work orders for regional technicians—but the reports also need to be used by corporate decision-makers for planning and by account managers for follow-up calls.

To manage the delivery of these critical documents, companies often depend on the print services provided by the underlying operating system. However, UNIX® and Microsoft® Windows®

Capabilities	UNIX	Windows	hp document router
monitor output devices	✓		✓
track delivery success/failure	✓	✓	✓
automatically retry delivery			✓
resend jobs			✓
reroute jobs			✓
provide single interface for multiple output destinations			✓

systems cannot provide reliable output delivery and management (such as error detection and recovery) across a distributed, heterogeneous environment. These systems require separate interfaces for different output devices, and users cannot easily track or monitor the success of their output jobs across these multiple devices. If there is a printer failure, the systems have no capabilities for automatically resending or rerouting documents. And a significant amount of administration is required to restart stopped queues.

In addition, with CRM applications, the need to recreate output can be a difficult, time-consuming task. For example, in the case of a printer failure, users cannot easily reprint a transaction-based document. In order to reprint these documents—which are created as the result of running a series of tasks within a complex application—the process usually needs to be repeated. This means that users must first retrace their steps in order to recreate the documents and then send them to new output destinations.

Leveraging proven technology for output management.

For companies desiring to gain a competitive edge with CRM applications, the hp document router delivers an ideal solution. This new server appliance combines hardware and software for delivering electronic documents via outbound fax, e-mail systems, local/remote printers and corporate intranets. It enables both end users and IT professionals to:

- deliver a single document to multiple output devices—printers, fax machines, e-mail systems or intranets—from any application's standard print command
- send documents to devices at remote locations, such as branch offices
- track and monitor delivery of documents via a Web-based interface

Building on the HP history of innovation, the hp document router enables organizations to leverage both industry-leading HP hardware and cutting-edge output management software. It is based on output management technology that has been meeting the needs of large Fortune 1000 enterprises for more than seven years. The new hp document router evolved from

the recognition that companies of all sizes—not just large enterprises—must deliver business-critical documents in a timely and assured manner.

Automated and assured delivery.

With the hp document router, companies utilizing CRM applications now have one way to access, manage and use all output devices—instead of using single-solution products, such as print spoolers, outbound fax servers and Web products. By automating and ensuring delivery of documents, the hp document router enables organizations to improve communications, decrease help desk calls and reduce errors and delays in critical business processes.

Key features of the hp document router:

- Single, multi-function resource.

The hp document router provides a single point of integration for all corporate applications, eliminating the need to customize applications for separate output devices. It intelligently formats and reliably delivers documents to any combination of output destinations—intranets, e-mails and fax transmissions or to any local or remote printer on the network. Through this single, easy-to-use resource, users can tailor the delivery method for different individuals or processes, without needing to make any document conversions or even leaving their desks.

- Automated delivery.

The hp document router monitors the output devices and automatically retries failed deliveries. Companies can configure the number of retries per device in the Web-based interface. Because the hp document router stores failed documents for three days or more, documents can be resent to an output device without being regenerated. Plus, users can e-mail documents or post them to an intranet, even if the documents were generated from applications that are not e-mail- or Web-enabled.

- Cross-platform compatibility.

The hp document router supports a wide array of industry-leading printers, e-mail servers and Web server software. It works across Microsoft Windows, UNIX, AS/400® and mainframe computing platforms. This means that users can easily send documents from any enterprise application, including CRM solutions from FrontRange Solutions (formerly Goldmine), Great Plains (with Siebel), Epicor, Intentia or Symix. And IT managers can seamlessly integrate output management services across the entire network.

- Web-based management.

The hp document router empowers users and administrators to track, control and manage the delivery of critical documents via a single Web-based interface. Users need only learn how to print documents in the application, rather than how to handle individual output devices. The Web-based management also empowers users to monitor and ensure that documents are successfully delivered. This leads to reduced training costs and fewer help desk calls related to printing, intranet posting and automated faxing.

The hp document router in action.

The following three scenarios explain how the hp document router improves business processes in the CRM environment—including customer/call center support, sales force automation (SFA) and marketing automation.

Scenario 1: customer/call center support.

Diane, a customer service representative, responds to a customer's call about a copier problem. She creates a customer support case in the company's CRM system. In the associated customer profile, she notes that this is a key customer—so she escalates the support incident to one of the senior technicians in the customer's area. Using the hp document router, she faxes the customer support case to the technician and also posts it to the company's intranet site (without needing to contact the company webmaster). Business managers who follow the intranet site closely—to identify common questions, track suggestions and determine the most frequent sources of support calls—have immediate access to this new information.

After solving the copier problem, the technician contacts Diane to update the customer support case. Using the hp document router, she e-mails the support case to a field sales representative for follow-up with the customer and also posts the case to the company's intranet site. The hp document router ensures the reliable delivery of the customer support documents, speeding up the process of satisfying the customer request.

Scenario 2: sales force automation.

Sam, a sales representative, is in the final stages of closing a time-critical deal with an important customer. He needs to make sure that both the customer and her attorneys are able to review the contract and give their approval by the end of the day. To get a jump start on the negotiations, he dials into his company's network from his hotel room. After finalizing the contract within his company's SFA application, he uses the hp document router to fax the contract to the customer's attorneys and also sends it to the laser printer at his branch office for his records. While following up on other paperwork,

Sam is able to use the hp document router's Web-based interface to verify the successful transmission of the contract. The hp document router enables this easy job tracking and monitoring—helping Sam to close deals in much less time.

Scenario 3: marketing automation.

Bob, an IT administrator, receives a frantic call from Marcia, the manager of the marketing department. Within minutes, she needs to present the results of the latest marketing campaign at an important client meeting. However, she has just learned that the vice president will be calling in from a remote branch office and will need a separate copy of the report. The detailed report takes too long for her team to generate with the company's CRM package, and there's not a fax machine in sight!

Using the Web-based interface for the hp document router, Bob looks through the recent jobs submitted by Marcia. Then, he simply selects the appropriate document and resends it to a printer at the remote office—without having to regenerate the report in the CRM application. He also uses the interface to verify that the document is successfully delivered. The hp document router speeds up critical business processes across the entire organization.

Summary.

The hp document router enables companies to manage business-critical output and deliver electronic documents across the entire organization. Individuals receive the information they need, at the correct location and in the appropriate format—whether it's via fax, e-mail, printing or the intranet. Plus, the hp document router enables users and administrators to track, control and manage all jobs and oversee output devices through an easy-to-use, Web-based interface. The result is more timely, assured delivery that allows companies to better serve both customers and sales organizations—leading to improved customer satisfaction and retention.

For more information on the hp document router, call us toll-free (in the United States) at 877.591.4647 or visit us on the Web at <http://documentrouter.hp.com>

While streamlining document delivery within an organization, the hp document router also lightens the workload for IT staff. The plug-and-play appliance requires a one-time-only integration with applications. Forget about the need to configure individual output devices and hire outside consultants each time you want to add a new device. IT staff can easily configure the hp document router to work with any corporate application, utilize a point-and-click driver download for all desktops and then centrally manage all output devices.



united states

Hewlett-Packard Company
301 Congress Avenue, Suite 1100
Austin, Texas 78701
U.S.A.
800.357.8357
512.494.7300
fax: 512.494.7394