

# Azuba CCM 8 Express Document Platform

## Benefits

- **Improved Customer Service** – Delivers great-looking documents that are personalized and distributed in the method each customer prefers
- **Expense Reduction** – Saves you money with reduced postage fees and other operational expenses
- **Business Growth** – Transforms routine correspondence into personalized messages for selling new services to existing or new customers
- **Process Optimization** – Optimizes the processes of template creation, document formatting, generation, and distribution so employees can be more productive with their core responsibilities
- **Regulatory Compliance** – Facilitates regulatory compliance by using required formats and terminology
- **Reduced IT Support** – Simplifies document creation and maintenance. Easily integrates with enterprise CRM, ECM, ERP, and other systems.

*“Without Azuba CCM it would be difficult for us to establish and maintain the level of responsiveness that our customers have come to expect from us. Our customer service teams are impressed by the time they save using Azuba CCM to deliver timely and high-quality correspondence to our customers.”*

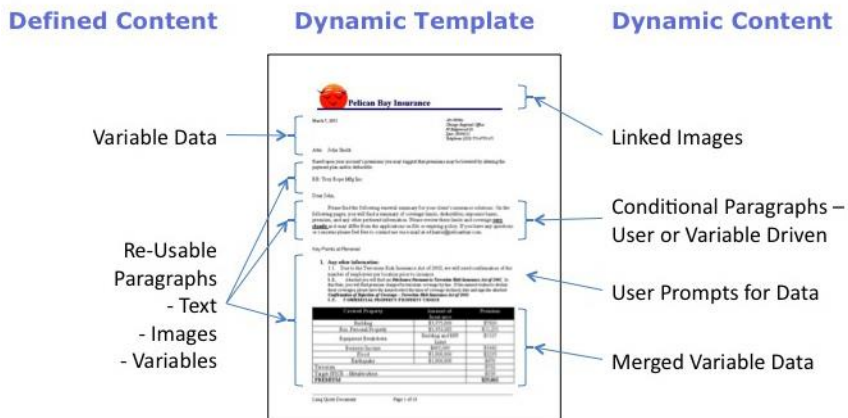
AVP Information Systems  
Mid-size Mutual Life Insurance Company

## Overview

Azuba CCM Express Document Platform provides software solutions that automate the creation and distribution of all types of documents such as customer correspondence, policies, agreements, explanations of benefits and other forms of personalized documentation. The Azuba Customer Communications Management (Azuba CCM) solution combines an easy-to-use document template design tool built on Microsoft Word along with a sophisticated server-based workflow engine that allows you to create and distribute documents based on your choice of process methods: Batch, Interactive and/or OnDemand.

At the time of document creation, variable data can come from a variety of sources including existing legacy applications, databases and/or user prompts, and be merged into templates to create a highly personalized document for a specific customer. Azuba CCM handles all the tasks of merging data, inserting paragraphs and images according to the template design and formatting the output into a professional, great-looking document you will be proud to send to a customer.

In addition, the Version Control feature allows for multiple versions of the same content objects (e.g. templates, paragraphs, images, etc.) to be drafted, maintained, tested, approved, stored, and scheduled for production all in one place. The use of pre-approved, rules-based document templates and content will ensure consistency and reduce errors in customer documents, simplifying the document creation process and increasing customer satisfaction by reducing document turnaround times. The Compose on Date feature even allows a document to be created based on a past date, using the specific content objects that were in production as of the date specified.



**Figure 1: Azuba CCM Templates**

Azuba CCM Express Document Platform capabilities don't stop there. After the document is created, Azuba CCM allows you to archive the document according to internal and regulatory standards and distribute the document to your customer, based on their preferred method of receiving information (e.g. mail, email, fax, self-service through a Web portal, etc.). Azuba CCM's householding functionality features sophisticated distribution management capabilities that allow you to group and sort your documents before distribution and significantly reduce your distribution costs.

### A Solution That Can Grow With Your Needs

Start with Azuba CCM Express Batch Option for a quick and easily integrated solution that allows you to replace older systems and take advantage of the significant productivity benefits offered by Azuba CCM’s template authoring tools and cost saving distribution management capabilities. Or, take the next step and use Azuba CCM Express Interactive Option to allow your employees to improve customer service by delivering accurate, highly-personalized documents in shorter response times. Then, when you’re ready, you can implement Azuba CCM Express OnDemand Option to take advantage of the significant benefits and savings realized by allowing your customers to view and create documents on their own through your customer self-service Web portal.

### Quick Start Implementation Program

Azuba’s customer-acclaimed Quick-Start implementation program provides installation of our platform, initial integration with one business application, design and creation of 3-5 document templates and training for authors and IT personnel at the customer site in a 1-2 week engagement. Our hands-on methodology, which prioritizes the “train-the-trainer” approach, will improve your knowledge of how to use Azuba CCM most effectively to facilitate project success across your organization.

#### Contact us today for more information:

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### Document Platform Options Included

With Azuba CCM Express Document Platform, you have a choice of which methods you employ to create documents: Batch, Interactive and/or OnDemand. Each method has its own advantages and the potential to deliver significant productivity, customer service and financial benefits to your organization.

- **Batch Option** – Azuba CCM integrates with your databases and files to automatically produce high volumes of documents on a scheduled basis.
- **Interactive Option** – Azuba CCM integrates with your business applications and data to allow your employees to interactively create documents on an ad-hoc basis.
- **OnDemand Option** – Azuba CCM integrates with a Web portal and data to allow your customers to interactively create, view and optionally distribute documents without requiring help from one of your employees.

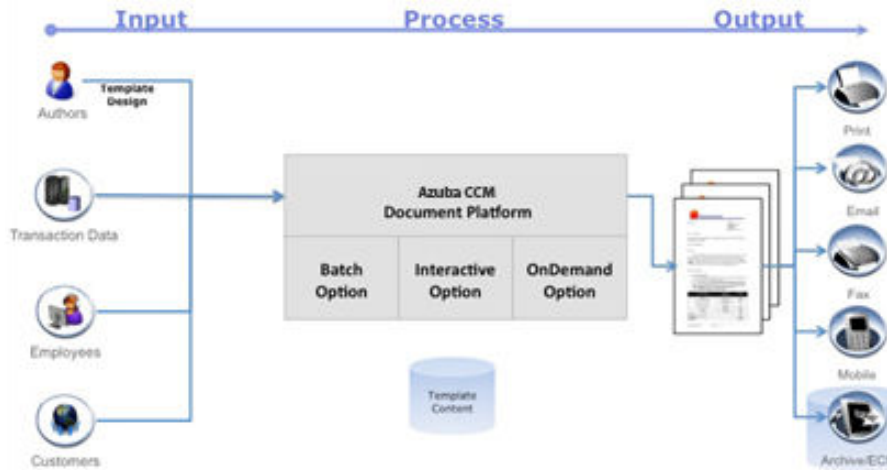


Figure 2: Azuba CCM Express Document Platform Workflow

### Functional Role Options

Depending upon your document creation needs, you also have the choice of several functional roles:

- **Users** – Users are employees, agents or other company representatives who interactively create, distribute, store, search or retrieve personalized documents.
- **Authors** – Authors are employees, agents or other company representatives who create and manage document templates, paragraphs, images, prompts and document workflows. Authors can also perform all User functions.
- **Developers** – Developers are employees or other company representatives who use Azuba CCM development tools to program extensions, integrations and other functions beyond the out-of-the-box capabilities of Azuba CCM. Developers can also perform all Author and User functions.
- **Casual Users** – Casual Users are customers, prospective customers, press and other people not associated with your organization who are authorized to view and create personalized documents via your self-service Web portal.

**The choice is yours.** At Azuba, we realize each customer is unique and will want to create and distribute documents according to their own requirements and methods. One size does not fit all, so where you start and what you implement is your choice. No matter which methods of document creation you choose, Azuba CCM delivers consistent capabilities for template design, workflow management and document distribution management. And, it is all backed-up with the reliable service and support our customers have known for years.