



## Print Room Outsourcing

learn about how the Perigord Group  
developed an innovative outsource solution  
for a leading **Financial Services Provider**





# Case Study

A global financial services business with a portfolio of residential home loans, commercial loans, equipment finance and consumer finance.

## The Challenge

The company operated an internal print room and it's primary function was the production and distribution of loan support correspondence including,

- Loan statements
- Notice of direct debit defaults
- Arrears statements
- MARP Guides and documentation
- SFS forms
- Confirmation of arrears agreement
- Direct Debit Mandate forms

The company employed a print room team on a full time basis. The team were responsible for printing, collation, folding, packing, despatch and manual fulfillment of all documents.

The print room occupied in excess of 200 square metres within their corporate offices.

The documentation was printed using multiple Hewlett Packard non-industrial laser printers. Generally, each printer was allocated to a specific type of documentation. All documentation was printed single sided and document packs were all collated, folded and packed by hand. Each pack component had to be matched manually and then assembled.

## Overview

### Financial Control

The internal print room represented a significant overhead for the organisation.

- Capital expenditure and associated expenses including equipment leasing and maintenance, printing materials and shipping.
- 200 Square meters of corporate office space occupied.
- Full time personnel with the associated employment costs.
- Back office staff.

Our analysis pointed to significant savings, achievable by outsourcing the transactional print production.

### Quality & Efficiency

- As every mail piece or pack was assembled and packed manually, the company was exposed to a risk of human error within the fulfilment and distribution process.
- The company did not avail of postage management discounts.



# The Solution

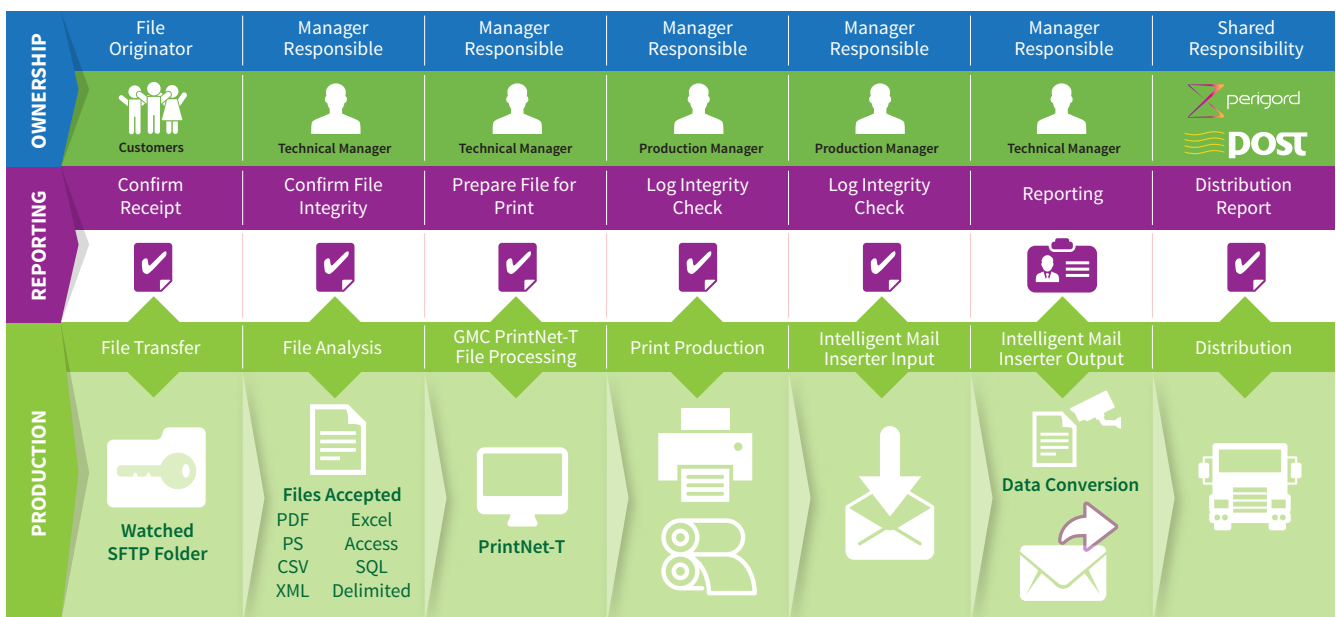
Working with the customer, the Perigord Group developed a print room outsourcing solution.

## File Transfer and Interrogation

The company's internal system produced a data file, which contained each document and instructions for fulfilment.

This was uploaded in real-time to Perigord's secure FTP server. Included in each transfer was unique information eg batch number. A confirmation receipt was automatically generated.

The Perigord Group's system then interrogates the file to capture the components required per piece/pack, such as, forms, direct debit mandates, BRE (Business reply envelope) etc.



## Printing & Fulfillment

Our production team work off the data received on our server. Based on the content of each document a unique barcode is applied. This contains embedded information and instructions for that page, such as a transaction number and it's sequence and place within the pack.

The printed material is then loaded into a central feeder for our inserting and folding line. Codes then tell the feed and folder to stop and start to ensure the complete integrity of each individual pack. Also, contained within the barcode are instructions that control the hopper units on the

inserter which dictate if a pack gets a BRE or a booklet. The process is entirely automated.

Using the embedded bar code on each document the solution constantly logs and records the movement and fulfillment of each page. This data is then reconciled with the input and print file confirmation of successful processing delivered securely to the clients crm system. This confirms which packs have been despatched and records the date of despatch. Any packs that jam or are misfed are sent to a divert tray and a reprint log is automatically generated.

## Compliance

There are specific regulatory requirements for handling financial services documentation. Within the solution a 2D matrix bar code can be added to each secure document and camera recognition within the high speed inserting line, records and captures identification data associated with that document.

## Features of the solution

- Automatic confirmation of receipt of the data file
- Capability to print double sided as opposed to single sided, thus creating a saving on paper stock and postage costs as the weight of each pack can be potentially halved.
- Bar Code generation and reading of all documentation, which determines folding and packing instructions.
- Comprehensive reporting/records of movement and fulfillment of each and every piece.
- Instant updates to the company's CRM once fulfilled to facilitate accurate communication of status to customers.

# Security

- **Data Security**  
The Perigord Group, operate to ISO27001 data security standard.
- **SFTP Connection**  
All files are sent and received via SFTP. This secure FTP connection ensures that an encrypted end-to-end transfer has taken place and that no files can be intercepted en-route.
- **Encrypted Server**  
All client data is stored on an encrypted server.

work to a line-clearance procedure on all jobs. All documentation and mailing pieces are removed from the area before commencing another job. All spoils, other than security documents, are shredded securely.

### Audited Sign-Off

An audited and traceable sign-off takes place when releasing all printed goods for distribution.

### CCTV

A Closed Circuit Television Camera network records all activity at our production facility on a 24/7 basis.

### Access Control

The Perigord Group operate from a secure production facility. All entry points are guarded by double-lock access card doors. All internal doors between departments are guarded by swipe-cards.

### External Security

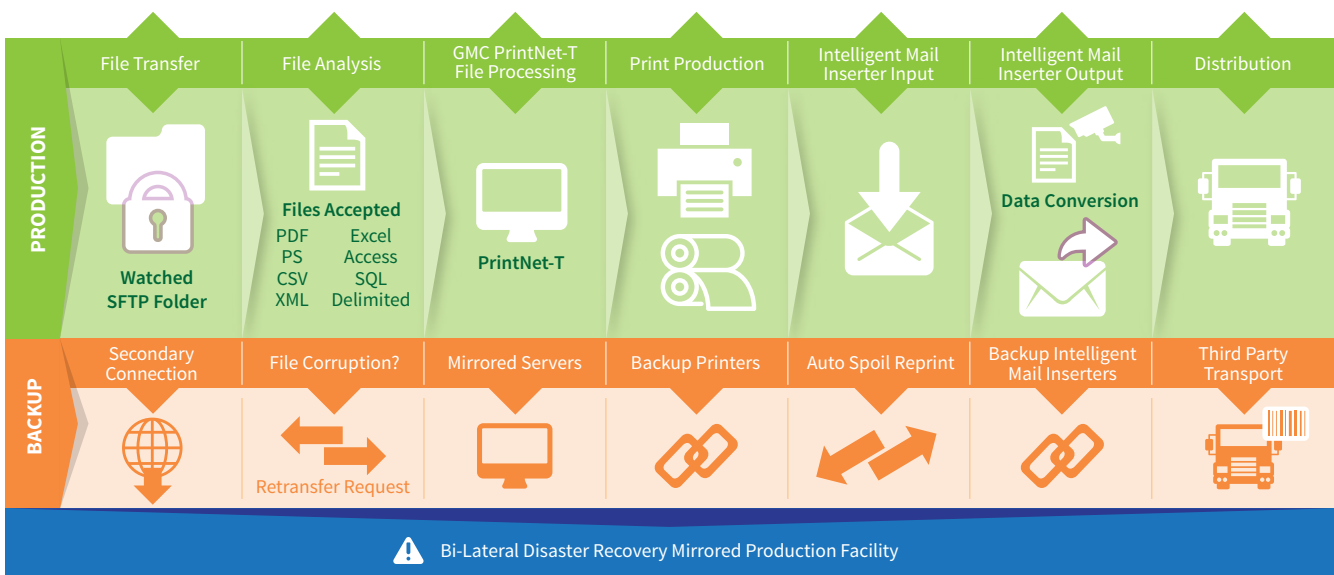
The building is guarded by a perimeter fence and automated access gates, which are monitored by CCTV cameras. Mobile security offers 24/7 security patrols.

### Secure Vault for Documents

All security documents are stored in a lock-down room. Access is limited to a responsible member of staff. All security documents are signed in and out of this secured area. Any spoils will be contained in this area until such time as they are returned to the customer and a spoil report sent to the customer.

### Intelligent Mailer Input | Output

All staff are employed by the Perigord Group on a full-time basis. All staff have signed confidentiality agreements. We





# Disaster recovery

**Prior to the solution the company did not have a robust disaster recovery plan for production of documentation. In the event of a complete cessation of production at our facility in Damastown, our disaster recovery plan will be implemented.**

## Site Relocation

In the event of a disaster which renders the premises at Perigord house unusable then the Critical Operations will be relocated to our DR production facility.

## Immediate Restoration of Services

- All primary systems are backed up off site. They can be restored at our DR production facility immediately following the unavailability of our primary production facility.
- Restoration of our Management Information System will allow for administration and management services to resume. We will utilise our DR production facility to allow for the immediate resumption of all electronic and voice communications services.

## Restoration of Production Services

We will utilise our DR production facility to allow for the immediate resumption of all Production services.

Data manipulation will also be controlled from our DR production facility. All production at our facility will be monitored as usual by our quality team.

This will guarantee continuity of supply and ensure that the integrity of the job and of our security policies are maintained at all times.

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# The Results

**The company has now completely outsourced their requirements for the printing and fulfillment of all regular process documentation.**

**Key advantages of the solution are as follows:**

- Release of prime office space.
- Elimination of all personnel costs within this function.
- Reduced printing costs by producing the documents on the Perigord Group industrial standard printing equipment and movement to double sided printing.
- Elimination of all print equipment leasing and associated depreciation costs.
- Reduction in back office costs in respect of staff payroll and the provision of benefits and processing of purchases.
- Improved and automated compliance with regulatory bodies.
- The company has now made significant saving by managing its postal requirements to avail of discounts.
- Significant reduction in the instances of human error within the printing and fulfillment function.



## ELIMINATE

Eliminate Artworking Costs

## PROTECT

Gather and Protect your  
Marketing Digital Assets

## REDUCE

Dramatically Reduce  
Cycle Turnaround Time

### Perigord Group

Established in 1976, the Perigord Group is an Irish owned marketing services group that specialises in the provision of marketing communications services, outsourced solutions, print services and technology. We deliver the technology to manage your marketing services and outsource requirements and then ensure all production is implemented to quality controlled standards.

For further information

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