

Smooth Sailing With ECM Solution

Selecting the right document data capture system helps a planned tour company process customer satisfaction surveys.

BY BRIAN ALBRIGHT

Companies looking for an enterprise content management (ECM) or document data capture solution have dozens of products to choose from. Each of these systems has strengths and weaknesses, which is why an experienced integrator can be an invaluable resource. Apple Vacations, a planned vacation/tour operator, learned the value of an experienced integrator when it contracted ImageSoft to design and deploy an automated document capture system in 2007.

Apple helps its clients plan and book vacations in locations around the world. As a service to its hotel partners, Apple regularly conducts customer satisfaction surveys and forwards the results to its hospitality vendors. "We use the information to monitor client satisfaction, and we share it with various hotels," says Colleen Caponi, senior marketing executive at Apple. These questionnaires include a number of "check box" type questions, as well as space for customer comments. In the past, the company manually entered the data from these forms into its SAP enterprise resource planning system, a process that took approximately two minutes per form. Since the company handles some 200,000 of these documents per year, survey handling had become inefficient and time-consuming. "It was a fairly complex, long form," says Gary Van Buhler, director of sales at ImageSoft. "Someone had to manually go through and pull the information off every form to enter into their system. They had a deadline to get the information back to the hotels, and this took a lot of time to complete."

Document Automation Speeds Forms Processing

Apple initially looked for an automated solution that utilized scanning and optical character recognition (OCR). It sent out an RFP to a number of companies, eventually choosing ImageSoft. "ImageSoft was not the least expensive quote, but we felt we were getting good service from the sales reps we were working with," Caponi says. "They were answering our questions and seemed to be able to find a solution to any problem we had."

ImageSoft specializes in advanced data capture and enterprise content management solutions. For the Apple application, the company implemented AnyDoc Software OCR for AnyDoc solution and a Fujitsu 5530C2 color scanner. The system also includes several other AnyDoc modules, including CaptureIt, Verify, Forms Processing, and AccuZip. "The system is very good at mark-sense recognition on structured forms," Van Buhler says. "To better utilize that, we helped Apple redesign their forms so the data could be recognized

more easily by the system and they could get a high hit rate on that information. The redesign of the form has been a key part of the solution's success at Apple, and ImageSoft's knowledge of the document data capture solution helped that process go smoothly. The redesign changes included switching from check boxes to ovals and adding registration marks so the forms were aligned. The system went live early in 2008.

Under the manual process, survey processing was split among several agents. With the automated solution, all of the forms are sent to Apple's Chicago office to be scanned in batches by a single employee. Once the forms are in the AnyDoc system, two employees verify the hotel name the client has written on the form and type the code for that hotel into the system. The remainder of the information on the form is automatically captured. Once scanned, the data goes into the company's SAP system, and employees can run reports to send to hotels. "Now the data capture is very consistent," Van Buhler says. "They run the surveys through the scanner and pull all of the data into their own reporting tool. We can also autodetect if there is text in the comment area and save image snippets of the comments for review, if required."

With an investment of \$35,000 for the software and less than \$6,000 for the hardware, the system paid for itself in a year and produced immeasurable goodwill for Apple with its hospitality vendors. "The time savings is huge," Caponi says. "It has cut the amount of time this took by more than half. We've been right on time with the survey results every month, and our hotels are happy because we can provide those results quickly." ImageSoft provides continued support by helping Apple with its annual form redesign and testing the new forms with the system to ensure the highest possible capture rates. "We've been able to get answers whenever we needed them," Caponi says. "Our account reps are very attentive and call back right away whenever we need something. But we haven't required a lot of relationship management because the system has worked so well." ●

The screenshot shows a software window with a form. The form has several sections:

- A header row with a grid of small boxes.
- A field labeled "Name of your destination or island" with a grid of boxes containing the text "P O A A E S A S".
- A field labeled "U.S. Departure Airport" with a grid of boxes containing the text "S T L O I S".
- A section titled "1. YOUR HOTEL ACCOMMODATIONS" with a list of options:
 - a) Comfort of your hotel room. ...
 - b) Maid service/maintenance of your room. ...
 - c) General hotel cleanliness. ...
 - d) Food quality in the hotel. ...
 - e) Service in the restaurant(s). ...
 - f) The hotel hours and bar service. ...

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