From Post Room to Portal
Publisure

Enable, Simplify and Accelerate your organisations Digital Transformation Strategy

Publisure Service Definition

Contents

An Overview of the G-Cloud Service

Publisure is a fully integrated software and SaaS based Multi-Channel communications Platform. Our objective is to facilitate the secure delivery of your documents (based on recipient preference) through the most expedient and cost effective communications channel.

Publisure does not require you to re-engineer your business processes. It works by integrating your existing print streams, facilitating a smooth transformation of your physical documents to deliver an integrated, corporate wide non-proprietary e-delivery platform.

Hybrid Mail

Publisure delivers a 'best of breed' Hybrid Mail solution enabling you to electronically submit your ad-hoc, departmental and centralised documents for automated print, enveloping, and despatch.

Secure Email

Publisure offers secure email functionality - Sensitive documents are password protected with a unique ID and encrypted (AES 256 bit) before being emailed to the intended recipient as attachments.

SMS Communications

Publisure offers a fully integrated SMS module. This Module allows you to either integrate via your current SMS solution (using a documented API) or deliver our own corporate wide SMS technology.

Web Portal

Publisure provides a truly 'open' architecture.

Publisure can integrate with your existing web portal technology by adding additional content without the customer needing to invest in expensive application specific APIs. Alternatively. Publisure provides its own corporate wide web portal. This includes a fully integrated registration and authentication process for on-boarding recipients.

Hybrid Mail should be a simple stepping stone in the journey towards an integrated multi-channel communications platform. Unlike traditional postal operators or mailing houses, Publisure offers a completely integrated, modular, and multi-channel e-Delivery platform.

Whole Life Costs v Cost per Envelope

Consolidation of documents into single envelope

The most immediate and effective way to make significant savings is to use fewer envelopes to enclose your documents. Based on our experience with existing Revenues and Benefits Clients in the public sector, we believe the (additional) Publisure consolidation module is capable of reducing your total postage bill by up to 30%.

The Publisure platform is specifically designed to reduce your postal costs and offers a simple methodology that allows your postal volumes to be migrated into an electronic delivery platform.

Rather than looking at the unit cost of an envelope (which is the traditional way of comparing Hybrid Mail solutions), we recommend focusing on the whole life costs of your communication strategy.

By facilitating and enabling the migration of your documents to e-delivery, Publisure offers a competitive and future proofed 'total cost of delivery' platform that one-dimensional Hybrid Mail suppliers will find difficult to match.
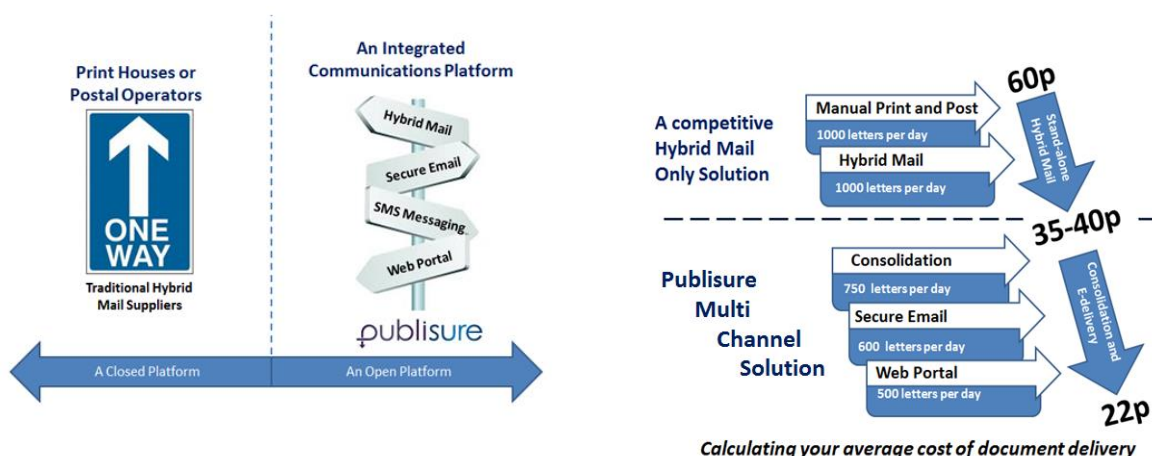
Calculating your average cost of document delivery

By facilitating and enabling the migration of your documents to e-delivery, Publisure offers a future proofed and competitive 'total cost of delivery'.

A quick overview of Publisure functionality and USPs

1. **Integrated as part of an a wider Managed Print Service** - The successful roll-out of the Publisure Hybrid Mail solution, will directly impact on your requirement for managed print services.

   Unlike postal operators or mailing houses, we see a direct correlation between the two strategies of print and post. We will pro-actively engage with the contracting authority to facilitate the implementation of an ***optimised <u>Print and Post</u> solution.***

2. **Integrated Multi Channel Platform** - Publisure provides an integrated single multi-channel communication platform incorporating Print, Post, and Publish technologies. Publisure is not just a Hybrid Mail platform

3. **Consolidation across document types and different print streams (Co-Mingling)** The ability to match, collate and envelope documents addressed to the same recipients across multiple print streams and departments.

   The consolidation module can be implemented as a stand-alone solution.

4. **Secure eMail** - Publisure is able to identify individual recipients and if appropriate (based on the individual's preference), attach a password protected PDF using a configurable and personalised email message

   Secure eMail has been shown to deliver significant incremental savings.

5. **Integrated Web Portal** - Publisure offers an integrated and configurable Web Portal technology.

   Using the Publisure APIs, Publisure works with virtually any application and can either integrate into an existing web delivery platform, or provide each authority with their own corporate wide solution using either a local or SaaS based model.

6. **All data is indexed and held within the customers firewall** - Unlike many cloud based Hybrid Mail solutions, all data and documents are securely encrypted and held inside the customers firewall.

7. **Integrated SMS Messaging** - Publisure offers an (optional) integrated SMS portal. For example, simple business rules can be configured that send an SMS notification to a patient or customer when a new document has been published, or to remind them of an appointment.

8. **Authorisation (Print and Post)** - The traditional Hybrid Mail Model is to 'print and post'. All Hybrid Mail technologies have the ability to recall documents, however Publisure is able to create simple, robust, workflows for more sensitive documents that may require authorisation before despatch

9. Change Control - Digitising your pre-printed stationery - We recognise that individual departments and business processes have different requirements. Publisure is able to use simple business rules to apply either digital or pre-printed resources to your outbound correspondence.

10. Does not lock you into a single production model - Publisure does not lock you into a single print and post model. Publisure offers both an in-house and outsourced solution. Importantly, the Publisure Hybrid Mail license can be easily converted to support a shared services model if required.

11. Modular Implementation - The Publisure model is not a 'one size fits all' solution.

    You are able to select some or all of the services mentioned. For example:-

    - In House / Outsourced
    - Hybrid Mail
    - Consolidation
    - Archiving
    - Secure Email
    - SMS Communications
    - Web portal

    All functionality is delivered within a single integrated solution. If an authority has an existing solution such as a CRM or archive platform, Publisure delivers an open documented integration framework ensuring it will deliver the data and documents required in the appropriate format and using the recipient's preferred methodology.

12. Management Reporting - We believe The Publisure Management Reporting interface is one its greatest strengths. It allows you to analyse, profile and act on the many different facets of document delivery.

We see management reporting as a key differentiator.

The MailMark Process

We recommend using Mailmark when posting your documents

Mailmark enables an organisation to view various reports on-line.

These reports provide various metrics based on the processing of your post and also highlights individual letters (via the exceptions report) that are 'not seen' by Royal Mail during the automated sortation and delivery process

PAF Validation

MailCentral uses the PAF database to determine the quality of an address and create the Delivery Point Suffix.

This option requires the customer to have a licensed copy of the PAF database.

MailMark integration

MailCentral automatically creates and stamps a 2D DataMatrix barcode on every outbound document.

The DataMatrix barcode contains the following key information:

Supply Chain ID: (Supplied by Royal Mail) – links to your online Mailmark account
Item ID: Unique Item ID – created by the MailCentral process
Delivery Point Suffix: - Validation of the address

The combination of Supply Chain ID and Unique Item ID creates your unique document ID.

What do Mailmark barcodes look like?

2D - Type 9	2D - Type 7	2D - Type 29	4-state - Barcode L
Size: 16mm x 16mm	**Size:** 12mm x 12mm	**Size:** 8mm x 24mm	**Size:** Up to 89mm
Content: 90 characters 45 for customer use	**Content :** 51 characters 6 for customer use	**Content :** 70 characters 25 for customer use	**Content :** No characters for customer use

Billing

The eManifest is not used by Royal Mail to create an Invoice. This process is done using your existing on-line Business Account

Using MailMark with Publisure

Most print rooms produce multiple post streams on a daily basis.

For example:-

- First Class Mono
- Second Class Mono
- First Class Colour
- Second Class Colour

Each outbound postal streams is consolidated into a single eManifest.

The MailMark Customer (reporting) Interfaces

To access the MailMark reporting tools, the customer must be registered with Royal Mail

The first set of management reports available through the customer interface(s) are based on managing the delivery of the documents detailed in your eManifest.

Usually these reports are available on the day after your documents were picked up by Royal Mail.

Fuel Dial

This is the **Fuel Dial** which displays all of the eManifests which can be selected.

By clicking on red, amber or green, you can select a set of eManifests based on their performance.

Predicted Delivery

This is the Royal Mail **Predicted Delivery** performance for the selected eManifest.

Volume

This is the Royal Mail **Volume** measurement for the selected eManifest.

Performance

This is the Royal Mail **Performance** measure for the selected eManifest. It shows your mail performance against the categories shown.

Batch Performance

Click here to view performance of the batches within the eManifest

This provides a 'high level' view of what is happening to the daily volumes you submitted through MailMark.

The MailMark Web interface allows you download exceptions.

Exception reports: These are the items that were submitted, but which have not been seen by the automated MailMark processes.

These reports can be used to pro-actively manage potential delayed/non delivery of important customer communications.

Hybrid Mail on-site solution

The Publisure Hybrid on-site solution operates inside the Contracting Authorities firewall

Utilising Existing Equipment

Multi-Function Devices/Printers - By default the standard Publisure offering integrates with any Postscript or PDF printer. Other types of Printer can be supported on request, but may require additional RIPs to be added to the core Publisure engine to enable additional output streams.

Envelopers/Letter Inserters – Publisure is capable of working with any intelligent fulfilment device:-

The standard fulfilment methodologies supported are:

- Barcode
- 2D barcode
- OMR
- OCR

In addition Publisure will work with any documented ADF solution (individual piece tracking)

IT Hardware

As part of the initial engagement with the contracting authority we will provide full details of the hardware and software specification required:

The typical specification for an internal Hybrid Mail server is as follows:-

Hardware: Intel Quad Core processor
                   8Gb memory
                   500 Gb Hard Disc

Operating System: Windows 2012 (or above) operating system

Although the hardware platform can be provided (at an additional cost) by Publisure, we would normally expect the customer to provide this as part of their supported ICT infrastructure.

Networking requirements

In addition to the above, we will advise on the suitability of the network, and ensure that the proposed solution is 'fit for purpose' based on agreed requirements.

Innovations

Publisure fully supports the digitisation and delivery of your documents.

Publisure provides a fully featured interactive web portal option in addition to SMS, email and secure email modules.

Publisure provides its own secure document archive platform and/or uses an API to export its documents to the Contracting authorities preferred EDRM system.

Publisure can be used to enforce a default postal service (typically 2nd Class)

Publisure also supports the use of both Physical and Digitised stationary enabling a Contracting Authority to continue to use their existing stocks of pre-printed materials.

Note: If closed face envelopes are used, the Contracting Authority will need the ability to spray on the address of the intended recipient of the document as part of the enveloping process. Publisure can drive the typical enveloping processes, if available, to enable this.

Publisure can be configured to produce the appropriate mailing reports and methods of presentation for the customers preferred postal carrier.

Consolidation is a key driver of postal discounts and Publisure provides a fully integrated consolidation module.

The Authorities Requirements

- Publisure is compatible the any Postscript or PDF printer

- Publisure can work with any document fulfilment methodology – barcodes, 2D barcodes, OMR, OCR etc.

- Publisure operates across any Windows environment including Citrix and Terminal Services

- All print drivers and other Publisure components are fully compatible with the above environments

- Publisure can be implemented in a clustered environment

- Consolidation (or co-mingling) is configured using whatever business rules the contracting Authority requires. The Publisure system provides a test environment in which any consolidation rules can be thoroughly tested before Go-Live.

- As the software authors, we are able to offer the contracting authority (as an additional service) bespoke software or customisation

- In addition to the Purchase Price of the software we can offer additional delivery and installation services. Typically the software is licensed across the whole contracting authority. All updates, support and maintenance is covered under the annual support and maintenance contract.

- Training and implementation are provided as a consultancy service - We believe in the 'train the trainer' approach. This empowers and enables the contracting authority to take ownership of the Hybrid Mail solution - We will advise each contracting authority of the recommended number of days required.

- The software is licensed on the basis of co-terminus (i.e. it ends at the end of the contracted period)

- Publisure provides a full test environment allowing the Publisure clients and server to be thoroughly tested against the contracting authority's mission critical applications.

- The customer can configure whatever consolidation rules they feel are appropriate

- Publisure provides the customer with the ability to add inserts on submission either through business rules, or print driver integration.

- Publisure provides Word templates which define how the default format for letter templates

- Publisure allows any document to be recalled and amended before it is resubmitted

- Using a documented API Publisure provides full integration with the Royal Mail PIF and PAF databases

- Publisure supports Mail Sortation options enabling the contracting Authority to maximise postal discounts.

The Publisure Business Process

Publisure Inputs

You can continue to simply print your documents

As Publisure can integrate into your existing print environment, applications do not require significant change. They simply print their documents to a different print device

Or drop PDFs into a watched Directory

Publisure can work with PDF documents. These can either be printed directly or dropped into a watched directory

Or Mail Merge your documents

Publisure allows any user with the appropriate permissions to submit mailshots from desktop applications such as MSWord

Or use Publisure to create a new document from data extracts
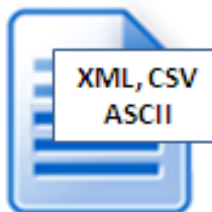
Publisure can work with existing or new data extracts, to create dynamic print ready documents

Creating the Appropriate communications (adding additional resources to your primary document

At the point at which the document is printed, or by using simple business rules , additional resources (letterheads, back pages, attachments etc.) can be added to the document pack.

Creating Simple Business Rules

Simple business rules can be configured that identify the individual types of documents created by your systems, and extract additional information for indexing, archiving, and multi-channel delivery (i.e. Post, SMS, Voice, (Secure) Email, or Publish).

Unique Document IDs
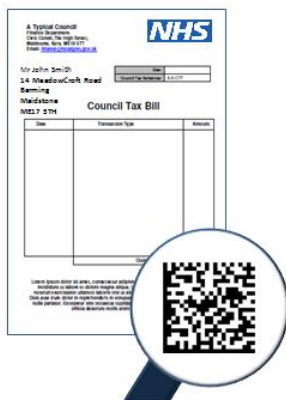
Every document submitted through the MyMail system is allocated a unique 24 digit ID. This ID is used to track the individual mail piece throughout the Publisure process.

As each document is processed by the Publisure system, a unique ID is added identifying each document and its attributes.

Secure Document Archive

Publisure creates an indexed PDF archive of every document that is submitted. These documents can be accessed securely by users with the appropriate permissions, or exported to your preferred corporate EDRM platform

Agreed Cut Off Time

At the agreed cut off time, all documents that have been submitted but not recalled are marked for despatch

End of Day Routine

All documents and the manifest are collated and prepared for submission

Document Manifest

A detailed manifest (piece tracking file) of every document submitted is submitted together with the encrypted data files to the Internal Print Room.

The Print Process

All jobs are audited, and released for print in accordance with agreed SLAs.

Intelligent Fulfilment

Documents are fulfilled using whatever agreed methodology is supported by the Print Room.

Barcode, 2D Barcode, OMR, OCR etc

Track and Trace

Depending on the sophistication of the enveloping process Publisure can work with virtually any documented piece tracking system the customer requires

Operational requirements

Publisure can be configured to optimise the production window and ensure all documents are formatted, optimised and presented to the Print Room in the agreed manner.
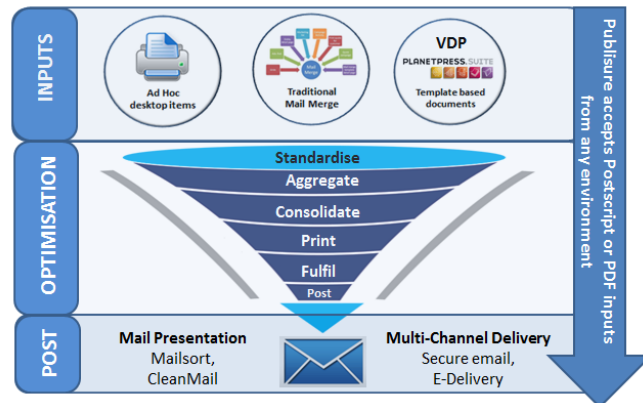
- Publisure produces configurable job tickets (and information) for each type of print stream produced.

- Publisure provides a full management interface enabling jobs to be stopped, started, paused, deleted etc.

- Publisure provides a secure operating environment requiring user and adiminsitartive authentication.

- Publisure can interact with one or more output devices (clustering)

Software

- Publisure enables Jobs to be automatically submitted, archived and deleted after expiry.
- Publisure Holds detailed accounting records for a configurable period of time (up to 7 years)
- Publisure provides an integrated web based user interface to manage the submission of jobs.
- The Log In page may be tailored (if required) by the contracting authority – this is an additional service.
- Job Tickets are automatically produced for each workstream
- Publisure provides an integrated print management system for the release of jobs.

Service Levels

Management reporting

Publisure monitors and reports on all aspects of service delivery and agreed KPIs – from the initial submission of a user's documents to their print, fulfilment and despatch, Publisure provides both simple user interfaces and configurable management reports that deliver the detailed information required for measuring Publisure system performance, auditability and compliance.

The Publisure Help Desk

The Publisure help desk provides detailed and accurate information relating to any issues that have been raised by the customer with regards to the performance of the solution against agreed service levels and KPIs.

Any problem identified by the customer is logged with the Publisure Help Desk. The Help desk will raise a support ticket and provide an incident number. Publisure will agree on the Incident severity and engage with the customer to resolve it within the agreed timescales.

The help Desk and the function it serves form part of the vital part of the Publisure on-going support service delivery platform. The help desk produces a monthly report of issues that have been logged, their resolution and any documented actions required in the future. This report forms part of the quarterly review we recommend is initiated between the Publisure Account Manager and customer.

A Dedicated Account Manager

A dedicated account manager will be allocated to each client. Each one of our Publisure Account Managers has a detailed understanding of the Publisure system, architecture and processes.

By being involved in every stage of the initial implementation, the Account Manager will be able to identify and tailor the delivery of the Publisure services to the specific requirements of each customer.

The Account manager is responsible for the delivery of the agreed Service Levels and KPIs to each customer. In the unlikely event that issues are identified or KPIs not achieved, the Account Manager will be responsible for identifying and documenting the reasons for non compliance.

The Account Manager will also put forward and agree with the customer an improvement plan designed to eliminate any on-going issues that have been identified.

Dispute Resolution and Escalation Procedure

Publisure has a fully documented complaints procedure of which the following provides an outline: If a client is not fully satisfied with the service or output received from Publisure, the Account Manager will obtain all the relevant information from the Client, i.e. estimate number, nature of complaint, details, timing and other forms of documentation. A verbal response will be made within 8 working hours and any written response within 3 working days.

On receipt of notification from a client of a non-conforming product/s, all relevant suppliers/sub-contractors are notified immediately. On receipt of a serious customer complaint or identification of a significant non-conformance, a record is maintained on a non-conformance form.

Non-conformance forms are passed to the Internal Publisure Quality Manager who investigates to determine the cause of the problem and where necessary, discuss the error with staff and/or suppliers responsible to prevent recurrence. A record is kept of any corrective actions deemed necessary.

Security – Information Assurance

Employee Checks

Where required, SLM employees are vetted to ensure they meet the security criteria laid down by the Disclosure and Barring Service Checks (DBS).

SLM is currently applying for IS027001 accreditation which we expect to complete by June 2018

The Security of the Hybrid mail process can be broken down into three distinct areas:-

- The Local collection server - Intranet based security for data held inside the customers firewall

- The Publisure DataCentre - Security of the data being held in the Cloud

- The Publisure Print and Production facility

The Local Collection Server

The software installed at the Contracting Body's site is compliant with the information security requirements of the N3 and GCSX networks, it has been approved as compliant with the Code of Connection (CoCo) scheme and compliant with Citrix Secure Gateway.

Unlike Cloud based solutions, the Publisure software is installed on PC or virtual machine provided by the customer and operating inside their firewall. This is known as the 'Collection server'.

Rather than requiring the organisation to configure individual PCs or application(s) to connect to a cloud based solution, the Collection server acts as a single point of

access for all back office applications and Publisure Print Drivers installed on the desktop.

Aggregating individual print files before submission optimises bandwidth and minimises transmission times between the organisation and the fulfilment centre. Publisure provides a secure **internal** web based interface that enables users to view and manage the documents they have submitted.

Different permissions can be configured in terms of who is allowed to access documents based on the requirements of the business process.

For example, a post box can be configured to enable only the user who has submitted a document to log in and view it. Alternatively, documents can be viewed by a workgroup or department.

Access to the internal Publisure system is enabled via a secure authentication process. This requires each user to have a username and password.

Integration with Active Directory

Publisure provides integration with an organisations Active Directory eliminating the need to duplicate user profiles.

Security of Data held on the local Collection Server

By default, all data held on the local Collection server is compressed and encrypted using AES256bit technology.

Until the agreed cut off time on each day, no data leaves the customer's network. At the agreed cut off time (typically 4pm), the collection server aggregates, compresses and encrypts all submitted documents before onward submission to the DataCentre.

Optimised use of Bandwidth

By aggregating all documents into a single file, the enhanced compression algorithms have been shown to reduce file sizes by up to 90%. The larger the number of documents submitted after aggregation, the greater the number of documents being sent, and the better the optimisation of your Network Traffic.

Secure Firewall Configuration

Only _outbound_ ports are configured between the Collection Server and the Data Centre. The status of each document that has been submitted is pulled from the data Centre rather than being pushed requiring outbound only communications

Compression and Encryption Techniques

All data is encrypted using AES256 bit technology

Compression

The data stream is compressed before any data is sent optimising the bandwidth required between the collection server and Datacentre. This provides the first level of security as the entire stream can only be uncompressed once it has been received in its entirety. No error correction techniques can be applied to rebuild a corrupted or incomplete file. This feature was implemented to ensure only a complete file transmission (rather than a fragment) can be processed successfully.

Encryption

All data is encrypted using AES256bit encryption technology.

Information Assurance C Impact Level (IL) at which the G-Cloud Service is accredited to hold and Process Information

Publisure is hosted in a secure, fault tolerant (99.95% availability) . The Data Centre holds full ISO27001 security accreditation. Our hosted Data Centre
is now one of a select few holding the highest level of accreditation for Cloud hosting services. Completing the IL3 accreditation process, They are compliant to process "OFFICIAL information and connected to the PSN Encrypted Overlay", to use the new Government Security Classification terminology.

The datacentre indexes and collates data from each customer. It is used to relay customer data to the Publisure production centre. This approach enables the data centre to re-route data (if required) for Disaster recovery.

The DataCentre provider uses two UK Datacentre facilities. Both have state-of-the-art facilities, top-quality connectivity and are manned 24/7 with skilled personnel.

Data Centre Security

The Data Centres all have the standard set of security measures; 24/7 monitoring, secure perimeters, personal swipe cards for entry, and no one is allowed into the buildings unaccompanied by the cleared staff.

The Data Centre Provider has multiple data centre locations with independent power and fibre links, allowing us to provide multi-site resilience. They have an organisational separation between the mechanical & equipment data centre layer, and the IT layer. This means that the staff who have physical access to the servers do not have access to our customer data base.

- All staff are CRB & background checked.
- Only systems administrators have access to customer servers.
- Access to customer servers is gained via personal keys, and all access is logged.
- Logs and activity are routinely checked by our head of security.
- Organisational separation of those who have physical access to servers, and those who know what is on the servers (see above).

Confirming Successful receipt of Data from the Customers Collection Server

Upon receipt of data, a secure handshake takes place with the Collection Server at the Contracting Body's site to confirm that all the data sent has been received. After indexing and verification, this Data is then securely transferred to the Publisure production centre using the identical and secure communication processes described above.

Deletion of Customer data on the Datacentre

When confirmation is received that print and fulfilment process has been completed, the data held on the datacentre is deleted.

The security SLA for this part of the Hybrid Mail process is that all data is deleted within 24hrs of the despatch date.

The only electronic copy of documents are held in the Archive facility on the Customers local Collection Server at the Contracting Body's site.

PRODUCTION CENTRE SECURITY:

The Production facility is accredited to ISO 27001:2005 and has been renewed to 2016. All the relevant staff at the Production Centre meet the security requirements of DBS and the company operates to ISO 9001 quality standards.

Access to the facility is by electronic pass only and all phones, recording equipment and cameras are not allowed into the production area.

The production part of the journey of the letter starts with the receipt of the encrypted data.

The data is decrypted and passed to the production software to be made ready for the specific print and enveloping processes used at the Production Centre.
The Production Centre uses a high speed, continuous print process, this means that the documents are printed onto large rolls of paper as opposed to individual cut sheets.

After printing, the rolls are loaded onto fulfilment equipment that splits the roll, guillotines the document into A4 pages, collates the relevant pages into a pack and then envelopes and seals it as a complete mail piece.

All 'wrecks' are placed in secure bins and shredded.

The envelope used is dependent on the size of the document. When the data is decrypted and processed, an analysis of the data confirms for example whether the recipient address is positioned correctly for a window envelope or whether it will require a wrapped envelope with the address printed on it.

It will also assess the size of the document and determine whether it will require a C5 envelope or a C4. Various print files are created dependent on documents mutual requirements and those files are sent for production.

This means that a roll fed production process is not only faster and cheaper than its cut sheet counterpart, but is also more secure as the printed matter goes from a roll to the inside of a sealed envelope without any human intervention.

Completed envelopes are placed into trays and handed over to a licensed DSA carrier. The postal carriers used by The Production Centre and Royal Mail are all compliant with ISO 27001 Under the DSA license, Royal Mail is used for final mile delivery.

On Boarding and Off Boarding Processes/Scope

Publisure have developed a tried and tested implementation methodology for Hybrid Mail.

Any successful implementation means working in partnership with each contracting authority to develop a specific project plan based around their current situation, requirements and expectations.

Engaging with the IT department early on - The most important department we need to work with early on in any engagement is the IT department.

The delivery of the Publisure Hybrid mail solution depends on their active support and participation.

Because we are a software house we are specialists in ICT. In addition to our own application we have an in depth, detailed understanding of the problems that can be faced implementing across different and varied operating environments.

This experience has been earned working by with many different types of corporate customer over 20 years.

Step 1 - Identify the Project Management Team

As a first step, it is important to identify the key members of the project team:-

- The project sponsor who has overall responsibility for the delivery of the Hybrid Mail project within the contracting authority
- An Internal project manager from the Contracting Authority
- A senior representative from the contracting Authority's ICT department
- A senior representative from the 'pilot' department(s) within the contracting authority
- A user representative from the lead department(s) within the contracting authority
- Publisure will allocate an overall Account Manager, a Prince2 accredited project manager and lead technical consultant to each project board.
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Step 2 – Project Goals

Once we have initiated the project, it is important that the project team clearly understand the aims and expectations of the customer.

The role of the project board is to articulate and agree these objectives by creating and agreeing a project plan which will convert them into tangible deliverables, implemented within an agreed and realistic timescale.

It is important at this stage to test the assumptions made by the customer about their current environment. For example, many customers believe the levels of Cleanmail they are achieving are actually higher than they actually are.

Step 3 – A Detailed Print and Post Survey

In order to 'benchmark' the current costs, we would normally recommend undertaking a thorough 'Print and Post' survey inside the target organisation.

Although an organisation may have a good idea what their total postal volumes are, these need to be profiled and broken down by department. Most Post Rooms can provide this level of detail.

Comparing Physical volumes against Actual Billing

We would recommend carrying out a comparison of the customers' historical postal volumes, against the actual bills received by the postal carrier.

Most billing is done retrospectively by the postal carrier.

In our experience there is often a discrepancy between what the customer thinks they should be paying in terms of CleanMail and the charges actually made by the Postal Carrier.

This is an important first step as it sets a benchmark in terms of how 'Clean' the current mail processes actually are.

If there are any discrepancies, it is important to identify their cause and origin from within the organisation.

Prioritising the delivery of the Hybrid Mail solution

We would not recommend a 'big bang' approach to deploying a Hybrid Mail solution across the Contracting Authority.

Prioritising Delivery - One of the key objectives of the 'Print and Post' survey is to identify those departments which generate the largest postal volumes, and prioritise those areas of the business where the implementation of Hybrid Mail could deliver 'best bang for your buck'.

For example, in a typical Local Government organisation, we know Revenues and Benefits accounts for 35-40% of the total postal volumes. After Revenues and Benefits, we would then look at the Planning, Housing (if still retained in-house), and Finance departments.

Communications Plan

An integral part of the project delivery is agreeing a document which articulates who needs to be kept informed about the project and how they will receive the information.
The most common mechanism is a weekly or monthly progress report, describing how the project is performing, milestones achieved and work planned for the next period.

Risk Management Plan

Risk management is an important part of project management. Although often overlooked, it is important to identify as many risks to the Hybrid Mail project as possible, and be prepared if something unexpected happens.

Typically areas to be considered are:-

- Time and cost estimates too optimistic.
- Customer review and feedback cycle too slow.
- Unclear roles and responsibilities.
- Stakeholder input is not sought, or their needs are not properly understood.
- Stakeholders changing requirements after the project has started.
- Stakeholders adding new requirements after the project has started.
- Poor communication resulting in misunderstandings, quality problems and rework.
- Lack of resource commitment.

We suggest risks are tracked using a simple risk log.

Each risk identified is added to the risk log; The Log will suggest how these risks can be mitigated or resolved. The Risk log should be reviewed on a regular basis, adding new risks as they occur during the life of the project.

A Specimen Project Plan for the Implementation of hybrid mail

1. **Contracting Authority appoints overall Project manager** - The role of the project manager is to manage and co-ordinate the resources required by the contracting authority to implement the Publisure solution in accordance with the overall project plan

2. **Publisure appoints a dedicated Account Manager, Prince2 accredited project manager, and Technical lead to the Project**

3. **Contracting Authority appoint ICT lead** -   The ICT component is a critical part of implementing any Hybrid Mail solution. We strongly recommend that a senior ICT lead is appointed to the project management. ICT will be responsible for building the internal Publisure server, updating your firewall configurations, and supporting the implementation of Publisure across your IT environment.

4. **Contracting Authority appoints Departmental Lead** – It is important that we have the 'buy in' of the lead department that will be piloting the Hybrid mail solution.

5. **Contracting Authority appoints a User Representative** – It is important that we always consider the users of the system and ensure they have their views represented. Ultimately it is the users who will dictate the success or failure of the project

6. **Conduct a detailed Print and Post Survey –** We believe it is essential that the project team has clearly defined the current postal activity across the organisation and identified any 'risks' associated with this analysis.

   This information will be used to identify which business areas to initially focus our efforts in and serve as a base-line for determining the success criteria for the Hybrid Mail project.

7. **Articulate, agree and Document the Success Criteria for the project**

8. **Articulate, agree and Document the Management Information required by the contracting Authority to monitor and report on the Hybrid Mail Implementation** – We believe the MI provided by the Publisure system is a key differentiator. Not only does it audit activity, it also provides a wide ranging number of reports such as CleanMail Analysis, Consolidation analysis, analysis by recipient (highlighting quick winds for e-delivery etc). *These reports enable us to work with the each Contracting authority to articulate and implement a process of continual business improvement.*

9. **ICT Build the Publisure Server and configure firewall environments for external post**

10. **Publisure Implement and test the Hybrid Mail Software on local server**
11. **ICT Set up appropriate authenticated remote access to enable Publisure Support –** This ensures Publisure are able to deliver fast and immediate support as appropriate without the need to involve internal ICT resources

12. **Identify the appropriate Hybrid Mail component that should be used as part of the initial implementation (Desktop, Backoffice, Mailmerge)** – Although many people think of Hybrid Mail as a desktop solution, over 70% of document outputs are generated by 'back office' solutions. Typically, these documents are template based - If we look at a typical Revenues and Benefits department the majority of their documents are created and printed by the back office system as print ready print files or PDFs. By using the information gathered in step 6 – a detailed print and post survey – we will have identified the technology best suited for the initial implementation.

13. **Identify Document templates that are being used and whether they are CleanMail compliant –** The Print and Post survey will have highlighted any potential Cleanmail issues with the documents as they are currently being generated. Whereissues have been identified, the Publisure business rules or the templates themselves should be modified to ensure CleanMail compliance .
14. **Identify additional resources (such as Inserts or Letterheads) that may be required** – If documents are currently being printed and enveloped locally, they may require the use of pre-printed stationary such as letterheads, Additional inserts may need to be added to the letter by users before it is posted etc. - these resources will need to be catalogued and digitised.

15. **Identify Departmental or Workgroup Structure and Users** – It is important that the Hybrid Mail system mirrors the current work practices of each department. Access to documents and how they are managed needs to reflect the current requirements of the business.

16. **Demonstrate the Publisure system to the users to ensure we have their 'buy in' and not missed any 'gotcha's'.** – Nothing is more important than user acceptance, The idea of this step is to sanity check the proposed implementation before it goes ahead, to ensure it meets both the business requirement of the department and the aspirations of the users.

17. **Agree central (internal) point of contact for 1st line support –** As part of any implementation there should be an agreed escalation procedure for problems. We need to ensure the customer has allocated someone responsible for 1st line support.

    MileStone – Initial implementation Scoped, validated against user expectations, and agreed

18. **Configure and deploy Hybrid Mail Clients -** ICT Deploy the print driver (if desktop implementation) to test clients and/or Publisure works with contracting authority to set up and configure the Publisure business rules identified as part of the actions above.

19. **End to End Testing of Publisure Hybrid Mail Configuration** – Work with the departmental lead to ensure that all the appropriate document templates and documents identified as part of the initial implementation have been tested on an end to end basis.

    Note: To achieve this Publisure provides a fully integrated test environment ensuring the integrity and security of the testing and sign off process

20. **Test Implementation Signed off by Project manager**

    MileStone - Publisure system ready for deployment

21. **ICT deploy Publisure clients to appropriate desktops or server(s)**

22. **Publisure and /or Contracting Authority deliver user training (Train the Trainer)**

23. **'Go Live'**

    MileStone - Phase 1 completed

24. **Project review -** Assess the project against agreed success criteria and review 'Lessons Learned'

25. **Contracting Authority Sign off technology and take ownership of implementation for phase 2 and wider deployments**

26. **Project Team agree Wider Rollout with Publisure providing 2nd and third line support going forward** – A major objective of the initial implementation is to hand over the skills required to the contracting authority enabling them to take ownership of the Hybrid Mail application.

Publisure provides a multi-faceted solution that is suitable for virtually any type of document output. As we hope we have illustrated in the detailed project plan above, we deliver a professional, focused, in-depth and detailed implementation tailored to the individual needs of each contracting authority.

Consultancy, Implementation and Transactional Print Services for Hybrid Mail and Outbound Communications

May 2019

Contents

About CDS

CDS is an award-winning communications agency with over 170 staff throughout the UK including creative, UX and designers, web developers, print managers, print buyers and print operatives, graphic designers, editors, copywriters, journalists, project managers, web developers and programmers.

Our company provides multi-channel communications through a comprehensive range of services from consultancy, through to writing and design to production and delivery of conventional paper and digital solutions.

Hybrid Mail / Transactional Print

To delivery multi-channel Hybrid Mail solutions, we use our partner Publisure, a leading implementation and development partner of Neopost, together with transactional print services from our secure document management facility located in Aylesbury

CDS Production Centre

The Aylesbury production centre is a fully accredited site to MOD standards and with significant recent investment in systems, processes, equipment and personnel has the capability and scalability to deliver digitally printed and mailed products to a high standard.

CDS is experienced in the provision of digital print and mail solutions incorporating variable data templates, application creation, print production, enclosing and distribution.   All mailing processes are supported by 100% integrity and reconciliation reporting.

With a sophisticated print and mailing operation based in Aylesbury, CDS is an accredited user of the Royal Mail "Mailmark "postal discount service. This is widely accepted as the standard in mail distribution services through Royal Mail and is also acknowledged as the most economical route available through the Royal Mail for mailing in the UK.

Capacity

CDS is also a print management specialist (purchasing over £12m of printed materials for our clients annually) and has a wealth of experience, systems and processes enabling the sourcing and provision of specific printed items, envelopes and inserts at the most cost effective rates for the determined specification.

Our daily production capacity is in excess of 1m mono and 400k colour pages per day, and automatic enclosing capacity delivers around 140k mailpacks (with selective inserts if required) enclosed and mailed per day.

Security

CDS' physical and data security is to a high standard at the Aylesbury print and mail plant and is regularly audited for the work that we carry out for the Ministry of Defence and other clients that entrust us with sensitive data. We print cheques for Local Government organisations and are audited to ensure full compliance throughout this process.

Features and benefits of our service

Features

- Hybrid mail automation of desktop, print and post
- Centralised outbound communications solution
- Auditability and full audit trail of all outbound communications
- SMS integration
- Secure email - PIN encrypted
- Integrated web portal - print, post, email, SMS or publish
- Detailed Management Information
- Automatic registration and authentication
- Digitises your physical communications
- ISO certified environment (27001,14001, 9001)
- Full MailMark integration

Benefits

- Immediate cash savings
- Increased auditability and compliance of outbound communications
- Simple and easy to deploy
- Automatically digitises your outbound communications
- Automates and eliminates manual processes
- Track posted documents via MailMark
- Generates an archive of our outbound integration
- Integrates with your existing multi channel applications
- Provides full MI reporting
- ISO certified environment (27001,14001, 9001)

On-boarding and off-boarding Services

On-boarding

CDS provides a tailored on-boarding pathway based on your individual requirements. On-boarding is a collaborative process, involving stakeholder interviews and workshops, through which we will ensure we fully understand your

functional and technical requirements. This includes process design, workflow, user experience design, template development, data migration, system integration and hosting.

Testing

CDS operates a dedicated test team with ISEB qualified test analysts. We provide a structured test approach that is aligned with the project methodology, to ensure your service is robust and prove your success criteria have been met. We utilise automation frameworks to enable continual testing of systems throughout development, removing human error and increasing test coverage.

Our testing services comprise:

- Test strategy and planning – Developed at the outset of the project, confirming how testing will be undertaken through development, pre and post-go-live, and the customer's participation.
- Test plans
- Automation test framework
- Test execution – Testing, defect management and reporting
- Support of customer UAT
- Security (perimeter/application) testing
- Performance & Stress testing

Training

We offer multi-level training for administrators and users, tailored to each user level. We also provide train the trainer capability so that you are fully equipped to manage your own training.

Training sessions are "hands-on", delivered by one of CDS' experienced experts, on-site or at one of CDS' locations in Leeds, Cheltenham or London. We provide supporting documentation which includes step-by-step instructions and screenshots of your delivered system.

Off-boarding Services

CDS can provide a range of services to support off-boarding, including:

- Content archiving
- Content exports
- Supply of all IPR materials including designs and content

Ownership of the data contained in the solution belongs and rests with the client/customer. As the service is decommissioned the data will be extracted in its

native format and transferred to the client via trusted hand or other agreed transport mechanisms.

The service offering will hold data in a fully relational database and all data held as part of the service will be made available to the customer in the following options.

- Disconnected copy of the database
- Full data extract into csv file format
- A full documented data dictionary to define the data structure

Our reporting structure means that the data is always maintained separately from the reporting and metadata layer. This guarantees that it is always possible to move customer data to and from our service or utilised in tandem with another service.

CDS are ISO27001 certified for information security management and would adhere to these standards at all times including data removal and destruction.

The above services will be charged for based on effort required and our SFIA rate card.

Support

Support is provided through Publisure's Support Desk, which uses an industry leading call logging, service tracking and resolution reporting system. All tickets raised are prioritised and logged in the Service Desk System are directed to appropriate support staff based on priority of ticket and skill set of the support staff. All actions relating to a support ticket are logged in the system and a full audit trail is recorded which enables full reporting of performance against support targets and speed of resolution.

Ordering and invoicing process

CDS recommend contacting our sales team prior to placing your order with G-Cloud. Invoices are issued monthly in arrears with payment terms of 30 days.

Termination terms

By consumers (i.e. consumption)

Minimum 12 month term. Thereafter 3 month termination notice is required in writing. E-mail termination by approved contact is sufficient

By the Supplier (removal of the G-Cloud Service)

3 month termination notice in writing. E-mail termination by approved contact is sufficient.

Contact Details

Company Name:	CDS
Correspondence Address:	7 Eastgate Leeds LS2 7LY
Registered Address:	As above
Telephone Number:	0113 399 4000
Fax Number:	0113 399 4200
Website:	www.cds.co.uk
Name of Contact:	James Davis / Jonathan Astin
Telephone Number:	0113 399 4076 / 4023
Fax Number:	0113 399 4200
Email Address:	sales@cds.co.uk

Industry Standards

CDS delivers all our web products to internationally recognised standards. CDS is accredited to the following quality standards:

- BS ISO 9001 Quality Management
- BS ISO 27001 Information Security
- BS ISO14001 Environmental Management
- BS ISO 20000 Service Management
- CyberEssentials Plus
- ISO 22301 Business Continuity Management
- ISO 18001 Occupational Health and Safety
- ISO 10008 Evidential Weight and Legal Admissibility
- General Data Protection Regulation 2016
- PRINCE2 / Agile (BCS)