

Global Business News Provider Bets on Papyrus Digital Communication Platform

Ready for a modern CRM landscape, enabling successful Customer Experience and Business Empowerment

The Business

Dow Jones is a global provider of news and financial information, delivering content to a vast number of consumers and organizations around the world. Starting in 1882 as a niche news agency in a Wall Street basement, Dow Jones now features brands including The Wall Street Journal, Dow Jones Newswires, Barron's and MarketWatch.

The company's advanced data feeds, innovative technology and delivery systems provide information and financial tools in multiple languages to customers globally.

The Challenge

With a large customer base and huge portfolio of financial services and information in more than 30 languages, Dow Jones needed a Billing and Statement Presentment Platform adequate to meet the scope of its world-wide operations.

The systems in place were slow, difficult to change and siloed across products and lines of business (LOBs). The staff dealt with poor system performance and functionality issues in many areas, including multi-language, multi-currency billing, refunds, adjustments, balance transfers, delivery suppression, pre-pay and credit checks.

A simple paper bill could take up to four days to process, and it was not possible to provide joint invoices across LOBs. Often the only solution was to layer another workaround, with multiple manual batch processes that required 'hand holding,' constraining business flexibility and causing revenue loss.



The Solution

The new Statement Presentment and Delivery Solution running in the Amazon AWS cloud was built using the agile approach by three teams around the globe in the US, India and Europe.

The solution provides consolidated print and electronic delivery of statements, bills and letters. The system allows business departments to manage the print and email bundling selection. Data originates from PeopleSoft worldwide with a mixture of languages, including Japanese, Russian and Mandarin – often in the same data field.

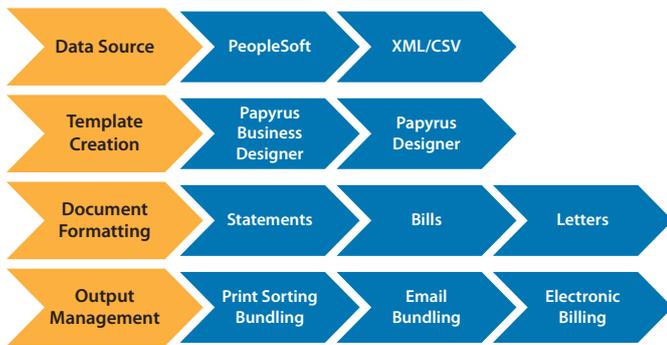
Multichannel output occurs via email with attachments, archived PDF and mailroom PDF for invoices and letters. Electronic billing is provided via integration with payment portals and XML/EDI files used directly in their customers' procurement systems.

Business Goals

- Eliminating operational complexity and performance issues
- Flexibility in handling the corporate invoice process
- State-of-the-art functionality across content, channels and formats
- Seamless communication via preferred channels – digital and traditional
- Significant business performance gains

Functional Requirements

- Invoice customers per ad-hoc request
- Consolidate charges for multiple LOBs in one invoice
- Present promos, variants and more info on invoices
- Support multiple languages, currencies in one template
- Produce tax-compliant invoices in multiple countries
- Specify delivery method for customers (mailroom, emailing, payment portals, etc.)
- Minimize number of templates



Papyrus WebArchive based on the Papyrus Distributed Depot technology stores all documents – PDFs, letters, email body with attachments, EDI files – with no change to the format or content in multiple depots as long as needed. The solution provides flexible search views and custom production reporting based on different metrics: per channel, per countries, etc.

Ensure Efficient Bundling for Print and eDelivery

Due to the company's multitude of specialized products and large volume of documents being sent to all clients, the solution had to ensure efficient bundling of both print and email outputs.

Bundling is managed by business users via the user-friendly Business Template Administration View based on criteria, such as product, country, etc. and business rules. Once the criteria are set, a process runs through specified conditions and collects the targeted emails to bundle into a single package. Instead of receiving hundreds of emails to their inbox, Dow Jones customers now receive a weekly or monthly collection of bills and attached PDFs in one single email.

A similar process is used for printing – based on a list of attributes business users can decide which invoices are to be sent to the customer and define which print provider should handle the output. Bundling logic is completely flexible and extendible using any kind of input data. Documents are bundled, sent for printing and distributed with least-cost routing.

Multi-Environment Bundling

The system provides multi-environment bundling in different environments – DEV, PROD, STAGING, UAT for a true parity from DEV – PROD, ensuring that any change can be rigorously quality assured.

All functionalities developed specifically for Dow Jones are now part of Papyrus Software's standard solutions and available to all customers.

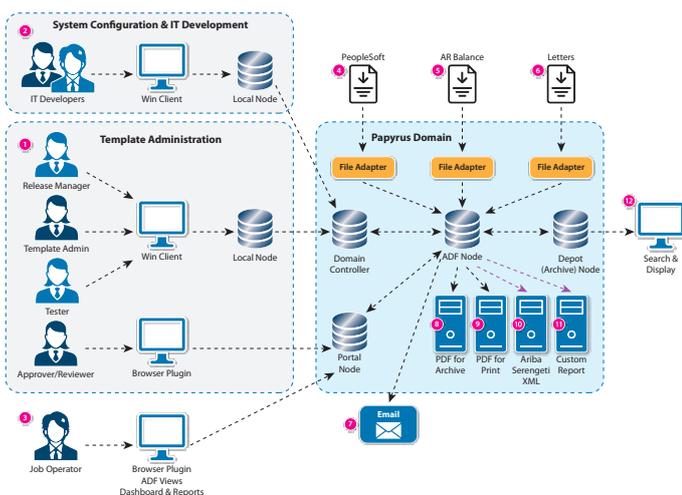
Business Benefits

- Business takes ownership of the entire letter content creation
- Controlled and transparent Change Management process
- Flexible handling of multi-language input data
- Efficient print and email bundling
- Business control over complex delivery rules
- Custom production reporting/oversight

IT & Business Collaborate on Template Creation

The template creation process leverages a hybrid approach using the **Papyrus Designer** for IT and **Papyrus Business Designer** for business departments, allowing the business to self-serve its needs by creating and managing templates independently of IT.

With B2B bills exceeding hundreds of pages and containing multi-column tables based on advanced rule-based requirements, a rock-solid logic was needed. Papyrus Designer for IT fulfilled this need. The tool works in tandem with the Papyrus Business Designer and solves more complex communication demands that go beyond the capabilities of business departments, allowing business and IT to work collaboratively.



Letters have variable data content and are composed by letter writers in a simple and efficient way. Completed letters are taken into the **Papyrus Automated Document Factory** workflow and scheduled into a depot for distribution. Everything is bundled straight out of the depot into the file system to be sent to print providers or via an email.

Papyrus Products at Dow Jones

- Papyrus WebRepository
- Papyrus WebArchive
- Papyrus Business Designer/Correspondence Solution
- Papyrus Designer Package
- Papyrus DocEXEC/PDF
- Papyrus Server Email SMTP, HTTPS, PDF-In

Snapshot

- **Organization:** Dow Jones
- **Business Challenge:** Inefficient Multi-Language Billing & Statement Presentment process
- **Goals:** Business performance improvement
- **Integration:** File-based input and output
- **Solution:** Papyrus Communications and Process Platform