RSA ROCHESTER SOFTWARE ASSOCIATES

Transamerica Retirement Solutions

Print as Diversified as Their Retirement Plans

"WebCRD has helped us become more efficient and better equipped to meet the demands of our internal customers. The application has allowed us to save time and money, achieve more with fewer people, and add flexibility and control to the entire print and fulfillment process ."

Andrea Eshoo,
Assistant Director Participant Solutions

Challenges	Solution	Results
• Streamline time-intensive process to create custom sales presentations • Increase efficiency and accuracy of the print fulfillment process • Gain control over non-printed premiums inventory	• WebCRD™ web to print submission software hosted in the Cloud • WebCRD Dynamics™ Variable Data Module • WebCRD AutoStock™ Inventory Module	• 85% reduction in manual work; custom material creation in minutes VS days • 100% electronic order submission • 90% of touches eliminated and real time inventory information for non-print premium program

Customer Background/Solution Overview

Transamerica Retirement Solutions is a leading provider of retirement products and services. Transamerica Retirement Solutions' mission is to help participants save and invest wisely to secure their retirement dreams. The Participant Solutions team is responsible for communicating this focused message to plan participants. A sub-unit of the Participant Solutions group oversees content management, e-delivery, Print-on-Demand and traditional print production and is responsible for getting the message delivered to participants accurately, timely and on or under budget. The team is tasked with managing internal and external vendor relationships and cost analysis; determining equipment requirements and recommending appropriate tools and resources to run a team that delivers nearly 100% accuracy. After success-fully merging two autonomous groups into a centralized print production area, the Participant Solutions team realized a cost savings of over $300,000 in the first year.

The next step was increasing efficiencies even further. At the end of 2011, Transamerica Retirement Solutions turned to Rochester Software Associates for a solution that would allow their salespeople to more easily create custom presentation materials for their clients. WebCRD automated web to print with WebCRD Dynamics for variable data personalization was the ideal solution for the sales team. And in January of 2012, WebCRD was rolled out as the ordering, fulfillment and production management platform for the entire company. "My team is a small pre-production group that processes all orders requested by the entire company," says Eshoo. "Our main focus is participant communication materials. This encompasses an array of materials from administrative information (for things like fund changes or beneficiary solicitations) to full blown marketing campaigns. Implementing a more efficient way to submit, customize, track and fulfill our work was essential to our business success."

Hosted virtually in the Cloud, the team and the application have fulfilled over 2,800 orders for 6,500 various items in the first eight months of using WebCRD.

Putting Materials in Salespeople's Hands Branded for Their Customers

It was actually the design team who approached Eshoo, looking for a new solution to the ever increasing customization requests. Designers were drowning in simple logo or color swap requests, diverting attention from the true creative process. There had to be a way, other than manipulating native files for the desired results. As in any company, the sales force is the driving force. All design work was put on hold until sales needs were met and turn-around times were

becoming tighter and tighter. It was not uncommon for work to be done overnight for sales needs the next day while other requests were put on the back burner. Transamerica needed a solution that would simultaneously address the sales force's needs while enabling the designers to focus on more significant design challenges and keep the work flowing on the client facing requests – they simply needed to improve productivity.

With WebCRD, the sales force was given the tool they needed to become more self-reliant and independent. They were given the ability to produce custom materials in a few mouse clicks, on their own! Sales consultants in Transamerica's regional offices across the country are now able to put together their own story boards, selecting from a variety of customizable campaigns, choosing from over 50 different color palates and a library of swappable images by client industry, selecting from over 100 different flyers, posters and other marketing materials. Orders can now be taken care of in five minutes versus hours or days. Designers now have the time to concentrate on new campaigns and more complex customization needs. The sales team is thrilled to be able to create their own items that look custom without needing overnight shipping or long delays. Everybody wins when productivity is increased.

Email is Not the Ideal Ordering Solution
Transamerica's old workflow involved multiple emails and phone calls to submit or correct a request, track status, or even reorder materials. "WebCRD gave us the flexibility to create our own improved workflow without needing expensive customization to the application," explains Eshoo. "For example, we now have 'reorder' buttons for frequently ordered jobs, immediate job ticketing to further speed up the already quick single-screen order submissions, pre-populated rejection codes and dynamic status updates. Our Client Executives can order communication materials just by looking in the catalog and choosing from the menu ... it's a true online shopping experience. We have even added hints such as correct billing centers to help avoid rejecting an order, further reducing edits and resubmissions. This has all reduced rejections to about 30% of orders." With 100% of orders now going through WebCRD, scheduling of jobs is automated, all shopping carts and orders are archived, and hundreds of combined hours are saved every month.

WebCRD is not only more efficient than placing orders via email - it's more accurate and traceable. " Before online ordering, every now and then an email would get misfiled," explains Eshoo. "Since we've implemented WebCRD and moved all ordering onto this platform, everyone has better access to information. With the click of a button, we can determine the status of any job in the system. That gives everyone inside and outside our department greater confidence."

Taking the Stress out of Tracking Stress Balls
Transamerica needed better expense, order and inventory control over their premium items. WebCRD provided a single point of contact and integrated management system. Instead of orders requiring multiple emails and phone calls to determine available inventory, employees can just submit an order and it is fulfilled.

"Using WebCRD and the AutoStock module has reduced the touches of our premium ordering and fulfillment by 90%," says Eshoo. "Employees can see if an item is in stock before they place an order (eliminating an "out of stock" or "backorder" email), and we can replenish before we run out. The budget-holder's approval is included with orders and the process just flows seamlessly.

Delivering on the Challenge
Transamerica Retirement Solutions turned manual and email-based processes into streamlined, efficient workflows that helped them build their business. Concludes Eshoo, "Like so many businesses we have moved from off-the-shelf materials to almost exclusively print-on-demand. That means less off-set and more digital, variable data printing. We needed an automated, electronic solution that could increase efficiency and productivity yet reduce the risks of human error. We presented RSA with a lot of challenges and they delivered."

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> Andrea Eshoo,
> Assistant Director
> Participant Solutions

Transamerica Statistics:
Employees: 2,000+
Locations: 8
Print Shop Staff: 15
Orders/mo: 250 -600
Impressions/mo: 2 million

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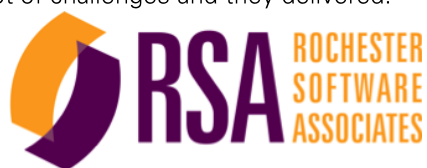
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