



Improving Business by **Improving Fax**



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Introduction

Recognizing the importance of fax communication to core business processes, many organizations have implemented server solutions to perform faxing functions. While these technologies certainly offer clear advantages over fax machines, they also put business performance at the mercy of the fax tool the organization is using. If the faxing system is not running as well as it should, neither is the business.

Fax is at the center of many business processes. When your organization can not rely on the tool it uses for faxing, or you find that your faxing system does not provide the capabilities necessary to support the business process improvements you need to make, the impact is significant and widespread. Delayed or lost fax communications hit the supply chain hard, sending ripples throughout order management, customer billing, purchasing and accounts payable.

This situation is compounded by uncertainty surrounding some of the fax server products that organizations have in place today. In response, business and IT leaders within forward-looking organizations are asking themselves some key questions.

- “What are the fundamental business problems that involve faxing?”
- “How do those problems affect other areas of the organization?”
- “If we didn’t have a faxing system in place and wanted to implement one, would we choose what we have now?”
- “Is there a better way to handle our document traffic?”
- “What are the options to replace our fax server, and how do we go about it?”

The purpose of this paper is to help you find the answers by presenting an overview of:

- Key factors to consider with regard to fax technology, IT operations and the business
- The impact of your faxing system on business processes
- Product selection and project execution

With an eye on setting up your organization for future success, this paper advises an approach centered around choosing a vendor who is still paying close attention to fax communication as it relates to business processes.





Fax, IT and the Business

Fax issues

With specific regard to faxing technology, organizations face a variety of issues with the tools they rely on to support day-to-day business operations. Key factors to consider include:

- **Fax software company mergers and acquisitions**, such as those involving RightFax and TOPCALL, creating uncertainty surrounding the future of installed fax server products.
- **Customer support issues** resulting from unresponsiveness and insufficient knowledge of the product in relation to organizations' specific environments and business processes.
- **Asset management and TCO** — total cost of ownership associated with running and managing assets to support faxing, including server maintenance costs spiraling out of control along with telephony expenses and telecom charges.
- **Stability issues** with fax servers that may fail without warning, causing disruptions that ripple throughout the business.
- **Functional limitations** such as a lack of scalability to support growth, notification of fax delivery status, self-service capability for users to resend faxes if necessary, and support for technologies such as Fax over IP (FOIP).
- **Too much paper** as organizations still find it necessary to print hard copies and file fax documents manually.

IT issues

On the IT side, important considerations include:

- **Time and money spent maintaining fax infrastructure** such as fax lines, fax boards and multiple servers — costs which are compounded for international companies with offices around the world.
- **The need to consolidate on one platform** to standardize production and desktop faxing integrated with business applications, inbound and outbound faxing, and shared services.
- **Change control** for implementation and upgrading of enterprise resource planning systems such as SAP applications.
- **Declining or increasing fax volumes** that no longer match up with the fixed costs of the resources to support them.
- **Help desk calls** related to faxing.

How to effectively align IT and business needs

Solving a business problem that involves faxing is never just an IT project. Because fax communications have a direct impact on so many aspects of an organization's business, leaders within the IT and business groups need to work with and not against each other, knowing when and how to involve the various stakeholders. Only when business leaders and technology leaders come together can the organization determine what it really needs and identify the best solution.

Here are a few basic tips to help bring IT and business together:

- **Include IT and business leaders** in vendor demonstrations of potential solutions
- **Get end users actively involved** in evaluating potential solutions
- **Consider how a potential solution may be extended** to processes and departments throughout the organization

Business Process Impact

Focusing on fax alone, rather than converging around core business issues, an organization places strict limitations on its ability to improve processes within the order-to-cash and procure-to-pay cycles. Deciding to replace a fax server presents a valuable opportunity for your organization to examine the impact of that decision on key business processes.

How far does your fax server take supply chain efficiency?

Optimizing performance in procurement demands more than the ability to automatically fax documents such as purchase orders. Organizations also need to be able to:

- **Assemble and send supporting documents along with the PO**, such as specifications or terms & conditions
- **Deliver the documents to multiple recipients** within the vendor company, often by different means (for example, fax to one contact and email to another)

Does your fax server help with customer billing?

Achieving strategic objectives such as DSO reduction often requires the ability to:

- **Assemble and send supporting documents along with the invoice**, such as the original order and proof of delivery
- **Enable subscription list** capabilities that make it easy for customers to choose e-invoicing
- **Automate delivery of invoices via postal mail** for those customers who prefer it







Can your fax server process inbound customer orders and vendor invoices?

Removing inefficiencies associated with processing of transaction documents received fax requires:

- **Intelligent routing and prioritizing** of orders and payables
- **Reporting on process metrics** based on volume, documents processed per FTE and other criteria

Document accessibility for customer service and competitive advantage

Even for companies with the leading products and services in their markets, gaining and maintaining competitive advantage often comes down to customer satisfaction. Immediate access to documents received and sent via fax is crucial to respond to customer inquiries and resolve disputes quickly.

- Purchasing ▪ 
- Sales Order Processing ▪ 
- Shipping ▪ 
- Corporate Communications ▪ 
- Accounts Receivable ▪ 
- Accounts Payable ▪ 



- Purchase Order, RFQ, RFP, Specs, T & C
- Sales Order, Order Acknowledgment
- Shipping Report, Shipping Confirmation, Bill of Material
- SEC Filings, Investor Relations, Executive Development
- Financial Report, Invoice, Statement, Account Summary, Collections, Credit References, Dunning Letter
- Remittance Advice, Electronic Fund Transfer Sheet, Payment Request Approval

Navigating the Options

Today's best-of-breed technology gives you several choices to solve business problems that involve fax.

Document process automation solutions

After looking at the big picture of fax in relation to business processes, organizations often find that replacing one fax server with another is not the best answer. With a comprehensive platform for document process automation, the tool you use for faxing can also be used to manage processes such as accounts payable and sales order processing. Such a solution can automate entire document lifecycles, from capture of inbound data to routing and approval workflow, delivery via any combination of output transports, and electronic archiving.

On-premise server software

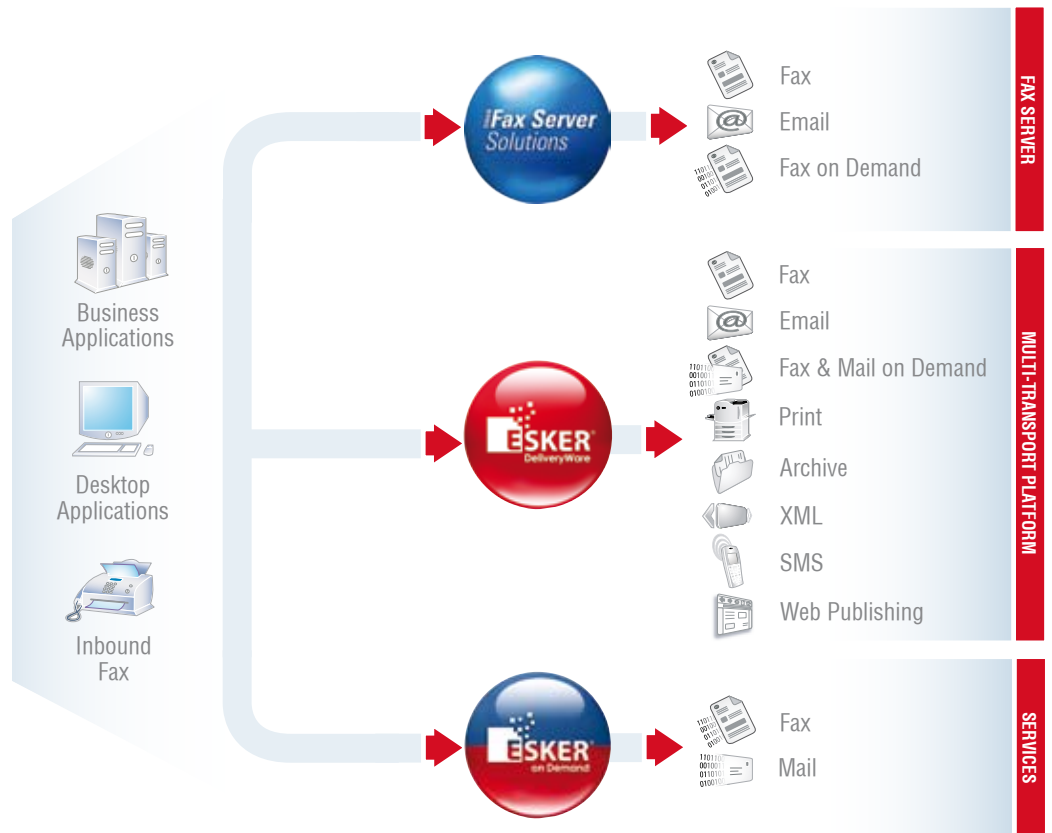
Whether it is a fax server or a multi-transport platform, having the software in-house gives your organization hands-on control over document management. An on-premise solution also offers tight integration with front- and back-office applications as well as the ability to customize the solution for specific requirements.

On-demand services

Vendor-hosted services offer the benefit of low upfront investment and the flexibility of variable versus fixed costs. This solution eliminates the need to buy and maintain new software or hardware while offering virtually unlimited volume for quick processing of large fax transmissions.

Software + services

As a backup solution when using fax boards, a fully capable server solution provides the option to use vendor-hosted fax delivery services for overflow and failover. This can eliminate the need to manage multiple redundant server systems in-house. Fax traffic can be automatically routed to the service during periods of peak volume or when local fax infrastructure is down. When the peak or downtime ends, processing reverts back to your local system.



Executing the Project

Fax migration expertise and resources

No matter which type of solution you choose, the success of your project will depend heavily on the vendor's level of experience in helping organizations migrate fax server solutions. This should include professional services to assist with implementation if needed, and a proven track record of knowledgeable product support.

Business process analysis

Execution should include a thorough analysis of your organization's document processes to identify at-risk points as well as opportunities for efficiency gains. A vendor who applies knowledge gained through a significant depth of practical experience will help you define and adopt best practices to maximize your return on investment in the solution.

Solution methodology

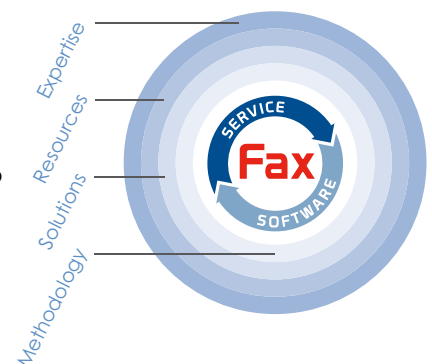
Success in solving business problems that rely on fax requires thoughtful planning and an effective strategy. To ensure that your project delivers the desired results, on time and on budget, the vendor should offer a formal solution methodology encompassing needs assessment, requirements and process analysis, implementation and production.



Fax Forward program

With its Fax Forward program and a team of experts in fax migration, Esker offers a consultative process for organizations looking to replace inadequate or unsupported fax server software products. In response to common challenges that many organizations are facing, the Fax Forward program provides access to a variety of resources for assistance with objectives including:

- Improving business process performance within the order-to-cash and procure-to-pay cycles
- Reducing overhead, controlling costs and ensuring future scalability by consolidating enterprise fax solutions
- Providing Software as a Service (SaaS) options to minimize total cost of ownership associated with fax infrastructure — including hardware, software, fax boards and lines, maintenance and training
- Ensuring security of document delivery
- Transmission of documents via FOIP networks
- Virtualization and more



The Fax Forward program combines specially priced solution packages with fax migration expertise to assist organizations in gaining the advantages of best-in-class fax and beyond — whether you choose on-premise software, an on-demand fax service or a solution combining the two.



About Escher

As a recognized leader in understanding and solving business problems that involve fax, Escher helps organizations eliminate manual document processes, increase process visibility and control, and reduce the use of paper by automating the flow of documents into, within and outside the organization. Customers gain significant and immediate operational efficiencies, cost savings and measurable ROI in as little as three to six months.

Escher solutions include an end-to-end platform that automates every phase and every type of document-based business information exchange, and on-demand services enabling fax and postal mail from enterprise and desktop applications without the need for printers, mailroom equipment, fax machines and similar infrastructure.

Founded in 1985, Escher operates globally with more than 80,000 customers and millions of licensed users worldwide. Escher has global headquarters in Lyon, France and U.S. headquarters in Madison, Wisconsin.

Solutions

Order-to-Cash and Procure-to-Pay Automation

To help organizations quit paper and automate business processes to speed cash conversion, improve customer satisfaction and increase profitability, Escher offers solutions spanning the order-to-cash and procure-to-pay cycles:

- **Sales Order Processing** to automate entry and routing of incoming customer orders
- **E-Invoicing** to automate processing and delivery of billing documents based on customer preferences
- **Accounts Payable Processing** to automate entry and routing of incoming vendor invoices
- **E-Purchasing** to automate processing and delivery of supply chain documents based on vendor preferences

Products and Services

Escher DeliveryWare

The comprehensive platform for end-to-end automation of any inbound or outbound document process, including options for on-demand faxing and postal mailing through Escher-hosted production facilities.

Escher Fax™ and Escher VSI-FAX®

Proven fax server tools for sending, receiving and routing high volumes of end-user and application-generated documents, with an on-demand fax service option for overflow and failover.

Fax Services

Automated faxing and tracking integrated into enterprise systems without adding software or hardware.

Mail Services

Automated postal mailing and tracking integrated into enterprise systems without adding software or hardware.

FlyDoc

Online fax and mail services integrated with desktop and applications and ERP systems.



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