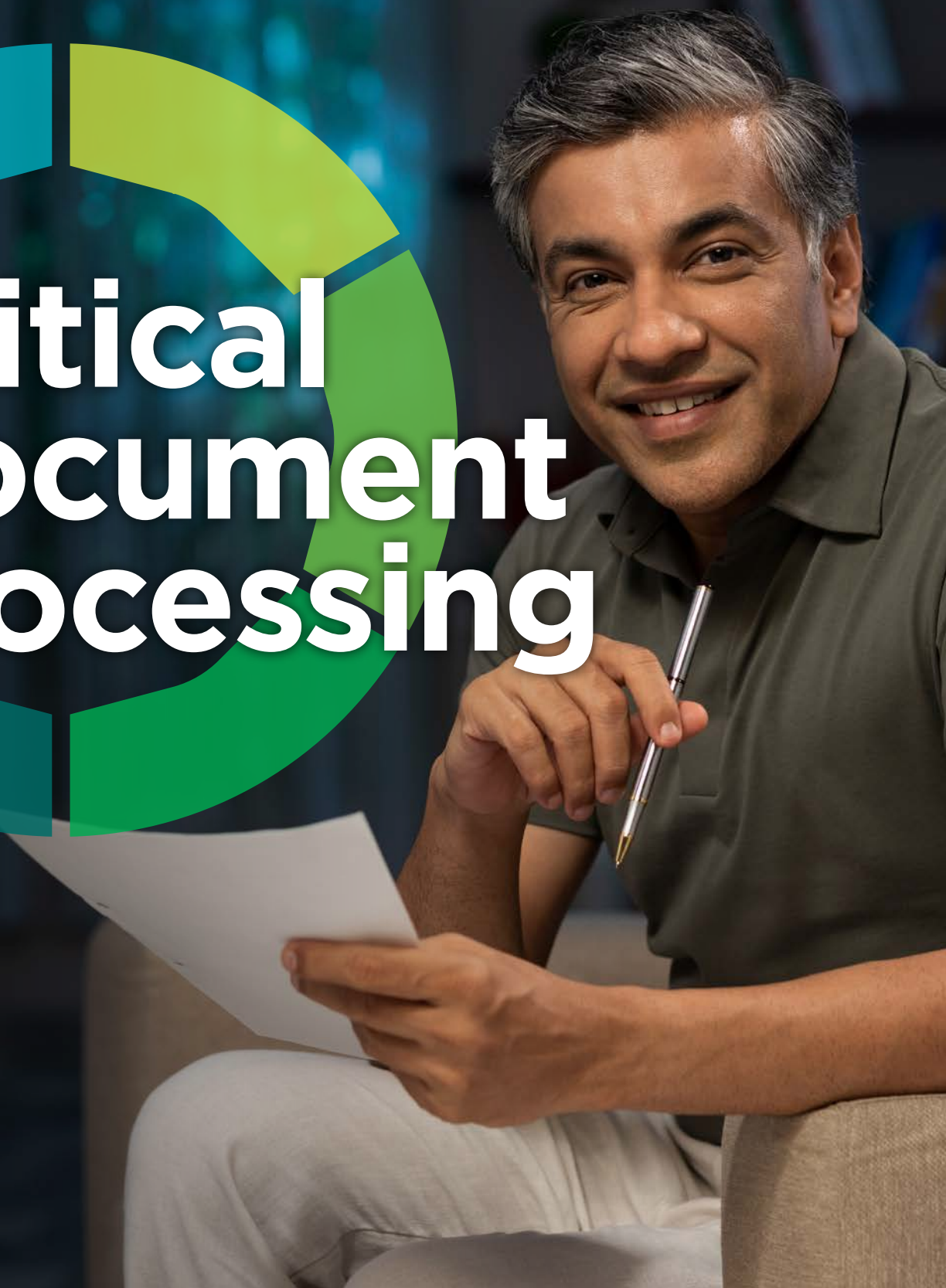




# Critical Document Processing



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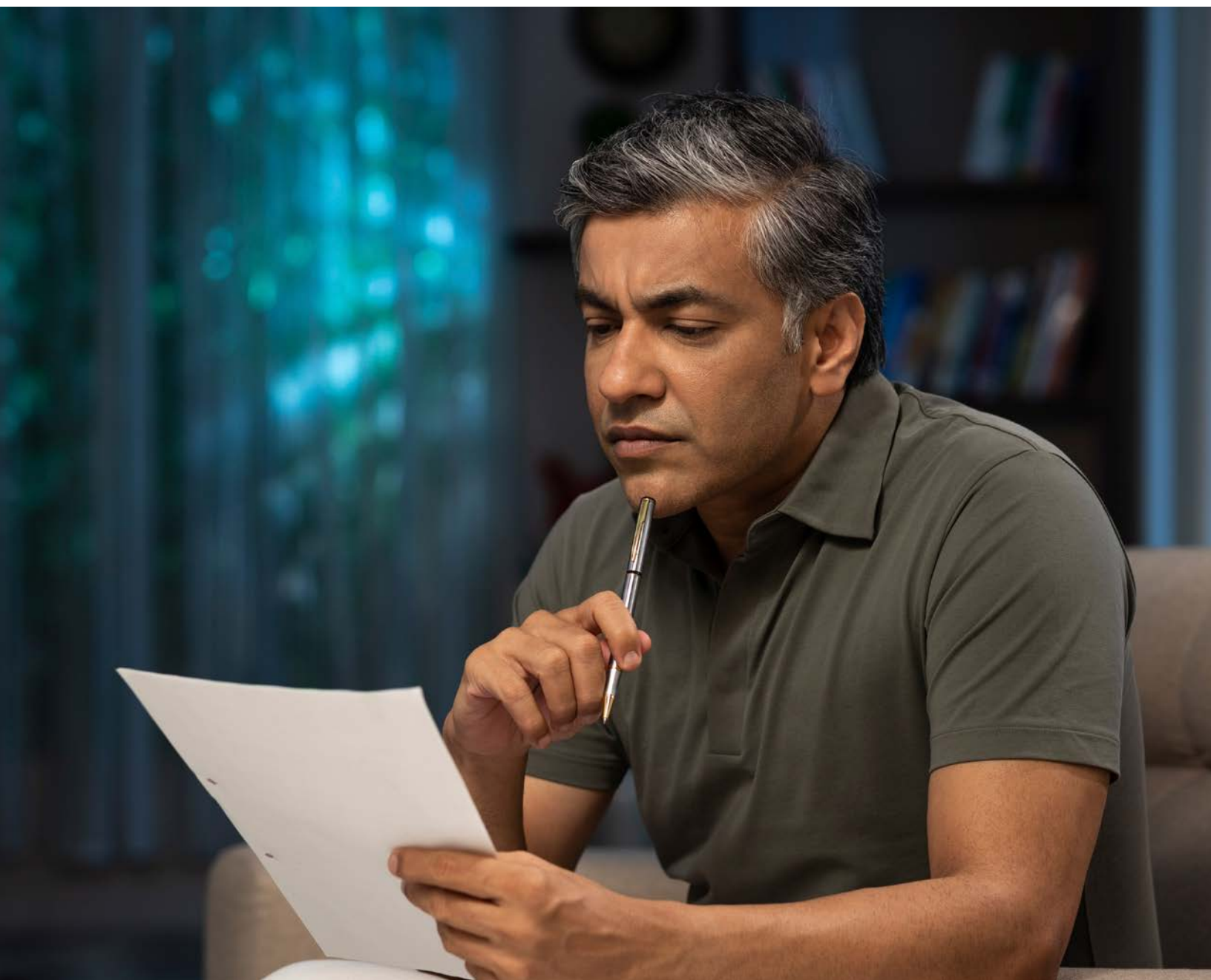




# Introduction

## **Automation That Will Improve Your Bottom Line**

Every business strives to process their critical documents in a timely and accurate manner. Our team can help. With outsourced critical document processing you can increase your processing efficiency. With zero hardware or software purchases required, you can deliver your critical documents to customers the way that they choose. Our system will improve your document delivery.





# **Quality Assurance: 4 Questions to Ask Your Critical Document Processor**

Quality assurance/quality control programs have grown in acceptance and necessity in the last two decades. Quality Assurance (QA) is process focused; Quality Control (QC) is a more product-focused component of Quality Assurance.

# Quality Assurance: 4 Questions to Ask Your Critical Document Processor (cont.)

As you would expect, large manufacturing corporations have been the early adopters or leaders in QA/QC, but even small companies have identified the value of a strong QMS, or Quality Management System. Many companies have a robust QMS; you really can't afford not to, considering the high cost of errors in any industry.

Consider automotive manufacturing, where recalls of 53 million vehicles cost \$22 billion in 2016, or healthcare, where medical errors cost some 400,000 people their lives, according to a 2013 study.

Thankfully, errors in critical document processing aren't life-threatening; still, mistakes made in the way documents are printed, folded or mailed can hurt business. Here are a few examples of the problems that mistakes in your bills can cause.

- Print resolution for a document is poor and makes the document hard to read. It must be reprinted. Processing is delayed.
- A document is folded improperly so that a barcode is not visible in the envelope window. This will cause problems with the postal service.

- Your critical document processing partner did not include an insert about a coming rate increase in the documents it prepared for you. Now, your company will have to do another mailing to disseminate this important information missed initially to its customers.

## **Comprehensive QA/QC ensures a job done right.**

A comprehensive QMS protects customers from errors like these and helps ensure that the product created meets customer expectations. Clients want to know that their suppliers will do the job right so when a supplier makes too many errors, a client goes elsewhere.

Before you choose a third-party provider to handle your transactional billing, ask for details about the QA/QC measures it takes. Here are four questions to ask your billing provider about QA/QC:

### **1. Does the company have a Quality Management System in place?**

Odds are good that it does, but the effectiveness of the program will depend on how comprehensive its QA/QC efforts are.

# Quality Assurance: 4 Questions to Ask Your Critical Document Processor (cont.)

## **2. Are Standard Operating Procedures in place?**

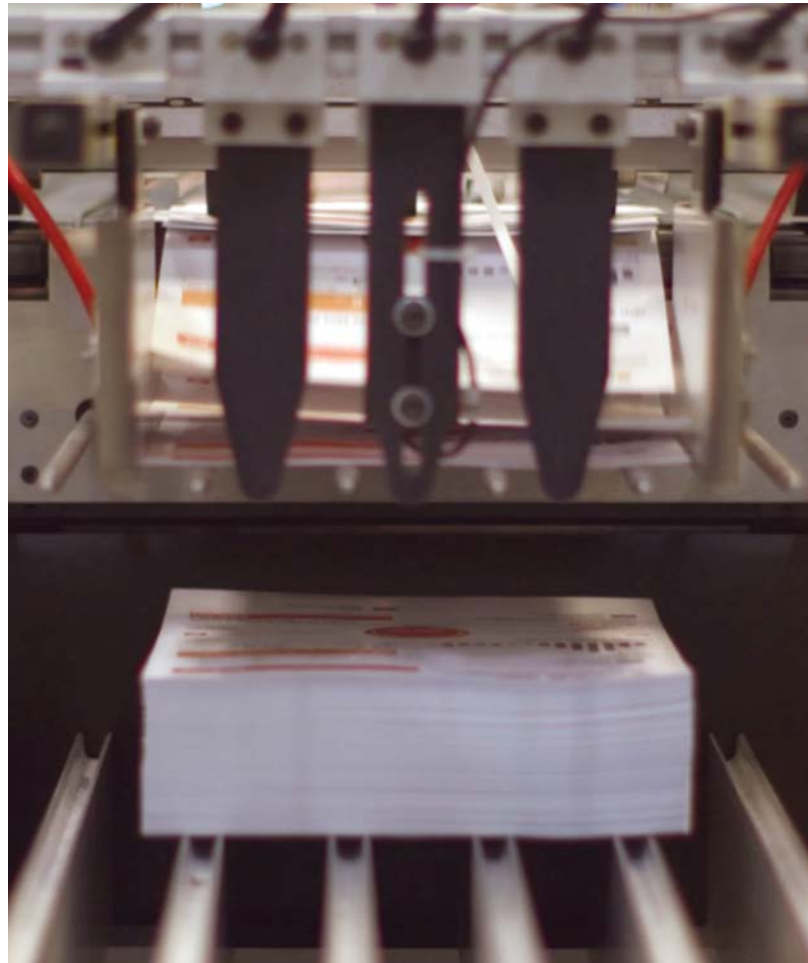
Has the company taken the time to create Standard Operating Procedures (SOPs) for all its processes? To do this, we evaluated all of our processes, from prepress and printing to folding and inserting and then created hundreds of SOPs to guide production and ensure our processes stay consistent and on the most efficient and effective path.

## **3. Is there sampling/checking done during production?**

Some companies check a job at the end of the line. Companies like ours that use the ISO 9001 (International Organization for Standardization) sampling system and draw samples of projects along the way, so that errors can be identified and adjustments can be made as early as possible to ensure the end product is 100% correct. Make sure the supplier you choose does sampling along the production path, not just at the end of the process.

## **4. Is there team involvement?**

Everyone involved in our projects is expected to adhere to the SOPs we've written. We get buy-in from operators and production staff by listening to their concerns and suggestions and taking them



work order. Project managers know the requirements of each project they oversee and can quickly identify errors or inconsistencies.

## **Seek a QA/QC program that covers these bases:**

One final point is to make sure a Quality Management System follows best practices. We use the industry-recognized process improvement methodology,



# Quality Assurance: 4 Questions to Ask Your Critical Document Processor (cont.)

DMAIC, to remind us of how our program should be used to work toward continuous improvement.

**Define:** Look at a process and document it by preparing an SOP.

**Measure:** Errors are measured to quantify the effectiveness of the process.

**Analyze:** Study the metrics of the process to validate any changes that need to be implemented.

**Improve:** By analyzing the impact of the processes, an SOP can be adjusted for a higher quality result.


**Control:** By following the previous steps, you greatly increase the opportunity for an expected output and reduce variation throughout production.

## **Talking about QA/QC success.**

Companies that have been successful in their implementation of a Quality Management System will tell you about the positive impacts the system has had on the company. Our program, with its focus on achieving consistency, accuracy, and precision, has reduced error frequency and cost associated with error dramatically since 2014.

At Bluegrass, we have cut the rate of error frequency and cost associated with it dramatically while changing the company culture to a “quality first” mentality at every level. This has a significant benefit for our clients, who know they can rely on us.

If you have questions about Quality Assurance and how it can ensure the success of your critical document processing projects, give us a call.



# What to Look For When Outsourcing Your Critical Document Processing

Outsourcing your critical document processing to a third party to handle your critical document processing by mail? Follow these three risk management steps to make sure your clients' data is safe and secure in someone else's hands.



# What to Look For When Outsourcing Your Critical Document Processing (cont.)

## **Security breaches make us all uneasy.**

Are you concerned about the security of your client's data? You aren't alone. Highly publicized security breaches like those suffered by Target, Adobe and Facebook make all of us uneasy about the vulnerability of confidential information that our clients and customers share with us.

As a business owner, you have a responsibility to protect your customer's personal information, not only when that information is in your hands, but when you share that information with a third-party company, such as those you contract to handle your monthly billings or invoices. That's why when you must carefully evaluate a third-party vendor before outsourcing your billing.

It's not nearly as daunting as it sounds. Taking these three steps will significantly lower the chances of a data breach when outsourcing your accounts receivable mailings.

### **Step 1: Create a team of security advisers**

Security solutions and services are a necessity in today's world. They must not only be implemented but continuously evaluated for effectiveness to ensure

that they remain an integral part of your organization. Ensuring that your third-party accounts receivable vendor is up to speed in terms of data security is not a job for one person. Create a team that will evaluate potential vendors to find one that best suits your needs. Make sure your IT manager and chief financial officer are on the team.

### **Step 2: Take a tour**

Are you based in or near the same city as your accounts receivable vendor? If so, have as many members of your team as possible tour their facility. Before your visit, talk to your team about what to watch for, including:

**Building access.** Companies that are truly concerned about the security of their client's records will limit access to their buildings and use cameras and video surveillance systems. Doors will be accessible only by key card or code and visitors will have to identify themselves and have business with the company to be given access. Visitors will be accompanied by a staff member at all times.

**A second layer of security.** Companies that are on their toes will have a secured area for their data that can be accessed only by the employees who work in that area. Typically these areas have no

# What to Look For When Outsourcing Your Critical Document Processing (cont.)

external walls and are in the heart of a building, for added security.

**Professionalism.** When you're looking for a company to partner with, it's important to get an idea of their professionalism and work ethic. Meeting the staff in person will give you the opportunity to ask probing questions and get a more candid sense of their experience and qualifications. You can also get a feel for how they interact with each other and their clients.

**Screening and hiring.** It is always a good idea for companies to perform background checks on potential employees. This is especially important for positions that involve handling sensitive data. A criminal history check can help to identify any red flags, and a credit check can provide insights into an applicant's level of responsibility. Personal and professional references should also be checked in order to get a well-rounded picture of the applicant. By taking these precautions, companies can help to ensure that they are hiring responsible and trustworthy employees.

## **Step 3: Ask four critical questions about data security.**

Whether your team meets your vendor in person or via Zoom, ask these questions:

**Do you have a written Data Security Plan that we can review?** Data security encompasses every aspect including physical safety concerning hardware and storage devices as well administrative measures such as policies & procedures which you put in place to protect your data with good old-fashioned common-sense precautions.

A data security plan also spells out steps to be taken if data security is breached.

A company that has not taken the time to write its data security plan is not serious about protecting your company's information. A company's data security plan should not be a static document. It must be revised frequently as technology and security change. Ask how often they review the data security plan. This might also be a good time to ask if the company has had any data security breaches in the past.

## **How do you educate your employees about the importance of data security?**

As a business owner, you are responsible for ensuring the safety and security of your company's data. One of the most important ways to do this is to train your employees on data security. How are employees educated about the importance of following procedures to protect data?

# What to Look For When Outsourcing Your Critical Document Processing (cont.)

Are workers allowed to download mobile applications on their work computers and devices? Mobile technology opens the door to many breaches. Do employees use strong passwords and do they understand the threats posed by phishing emails and downloading business data on their personal computing devices? There are many ways to ensure the safety of data, but it starts with the employees. If they are not properly trained on how to handle sensitive information, it could lead to a data breach.

## **Do you have a data storage policy?**

A data storage policy governs how data is managed and controlled. It determines how data is collected and stored, what is kept for future use or for reference, when and how records are disposed of, and how records are organized so they can be accessed. Is there documentation of which data must be kept and what data can be deleted and stored for a certain amount of time? More data stored over a period of time increases security risk. When you discuss data storage, you must stipulate the requirements that your company will have for its data.





# What to Look For When Outsourcing Your Critical Document Processing (cont.)



## **Does your company use encryption?**

Encrypting data protects your information from criminals, competitors, hackers, and accidents. When your data is encrypted, the information is scrambled and turned into a code that can only be deciphered when it is unlocked with a special key. The key is only given to those who should have access to the information. Encryption is an easy, effective way to protect data. So safe that even the U.S. government uses encryption. If a third-party accounts receivable vendor isn't up to speed in this area, this is a red flag.

## **Protection takes planning**

Your customers are the future of your business. Protect them and their confidential information by being proactive about safeguarding their data when outsourcing your billing. Remember Winston Churchill's advice: *"Those who fail to plan, plan to fail."*





## About

Bluegrass partners with businesses to:

- Deliver a more efficient way of processing critical documents.
- Provide modern document processing techniques to reduce costs.
- Cut costs internally, free up time, and increase productivity in other areas of your business.
- Improve customer communication and satisfaction.

With almost 50 years in business, Bluegrass has the experience and expertise to take your business to the next level.

## Our Commitment

As the needs of businesses have evolved, Bluegrass has adopted new technologies and solutions. We continue to meet our clients' growing needs by adding crucial services, from the physical processing of mail to highly interactive campaigns.

# Let's Work Together.

TO LEARN MORE, VISIT:

**WEAREBLUEGRASS.COM**

OR CALL:

**800.928.6245**

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