

# 2019

INNOVATION • QUALITY • STABILITY

KINGSCLERE, UK  
26th SEPTEMBER



OMNI-CHANNEL  
EXPERIENCE



MACHINE  
LEARNING



BUSINESS CASE  
MANAGEMENT



INBOUND MAIL  
AUTOMATION



BUSINESS DOC  
DESIGN & DELIVERY

# Open House & User Conference

PAPYRUS SOFTWARE

# HOT TOPICS AT THE 2019 OPEN HOUSE & USER CONFERENCE

## Digital Business Transformation

Digital business transformation is a key initiative for many organizations. With a well-defined plan, agility and a powerful digital software platform with support for RPA and AI, organizations can introduce a new business model that offers Omni-channel engagement, enhanced customer experience (CX) and streamlined operations. The Papyrus digital platform innovation is addressing true digital transformation of the entire business operations, irreversibly changing the way how companies interact with clients and employees to run the business more productively, efficiently and profitably.

## Omni-channel Business Engagement

Customers use today three or more channels when contacting companies. This requires a new communication model that will go beyond disconnected channels to offer seamless Omni-channel engagement across channels with a real-time back-office integration for quality of service and enhanced customer experience. The consistency of conversation is ensured through all communication linked to a customer case across the entire customer journey.

## Machine Learning empowered by AI

Training machines to recognize documents and messages while continuously optimizing information capture is a remarkable technology that can immensely increase efficiency. But what really improves business capability is a process solution that learns over time what your knowledge workers do when processing a case – when a certain document arrives, a particular state is recognized or when an exception is encountered.

## Multi-Channel Inbound Mail Data Capture

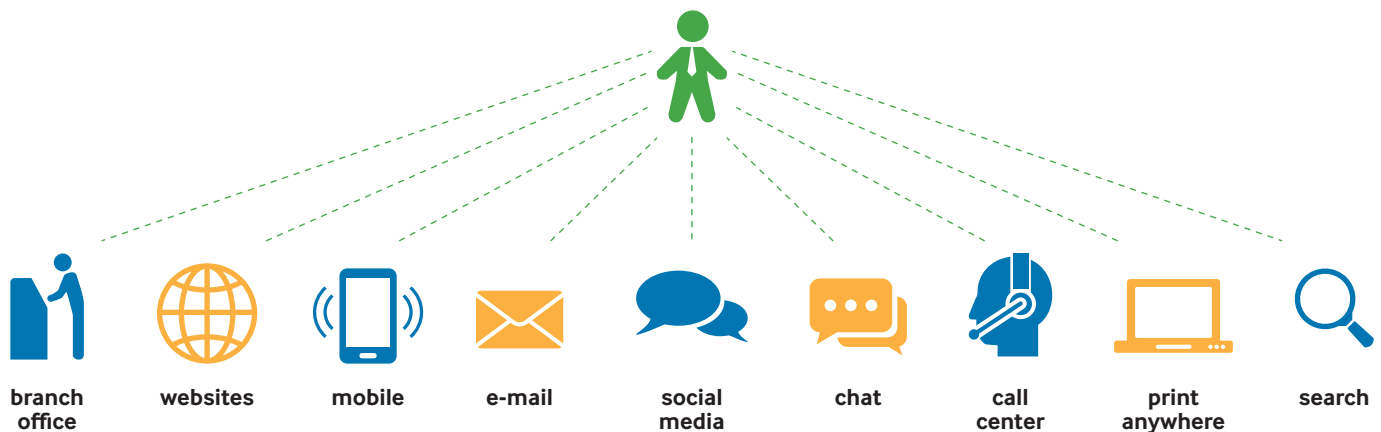
Digitizing and intelligently extracting data from incoming e-mails, PDFs, scans, fax and messages in structured and unstructured formats, including handwritten information is a key strength of Papyrus Capture. The state-of-the-art, self-learning classification process and machine learning utilize pattern recognition to increase accuracy and efficiency of data capture.

## Single-Source Document Design Across Physical & Digital

Smart document design by business teams and IT leveraging the holistic “One platform approach” allows companies to set new standards in communication with their clients and achieve significant gains in efficiency and business agility. Document layouts and building blocks are created only once and re-used across document applications and across templates for delivery via e-mail/HTML, Mobile, Web, PDF and AFP print – achieving efficiency, CI/CD, precision and quality. Integrated versioning, change and release management allow business teams to sign-off and deploy document changes at any point in time without waiting for a next general release.

## Robotic Process Automation (RPA)

Process flow diagrams for the Customer Journey are often too rigid for the modern business world. The Papyrus key innovation - ‘User Trained Agent’ (UTA) – takes a different approach and utilizes machine learning to empower business users with interactive process discovery and pattern recognition capabilities, supporting each customer individually. Papyrus can capture and classify any incoming document and message, automatically trigger the process/case, assign goals based on rules and suggest a rated ‘best next action.’



## Business Solutions for Mobile

Papyrus applications can run as native applications on all leading mobile devices in support of Enterprise Mobility. Users are able to communicate, take actions, track events, send requests and receive notifications with a direct back-office connectivity and smooth interactions with existing CRM, BPM, ERP and database systems even when out of the office.

## Preferred Channel Delivery / Output Management

Communication is delivered to each individual in their preferred language and channels of communication - Web, e-mail, Chat, SMS, Social, Mobile or paper, with a transformation to the specific channel only at delivery time for utmost channel independence. Tracking, tracing and monitoring of all jobs, starting with receiving the data and completing with archiving of documents with a feedback loop and notifications are key capabilities.

## Reporting and Monitoring Across Channels

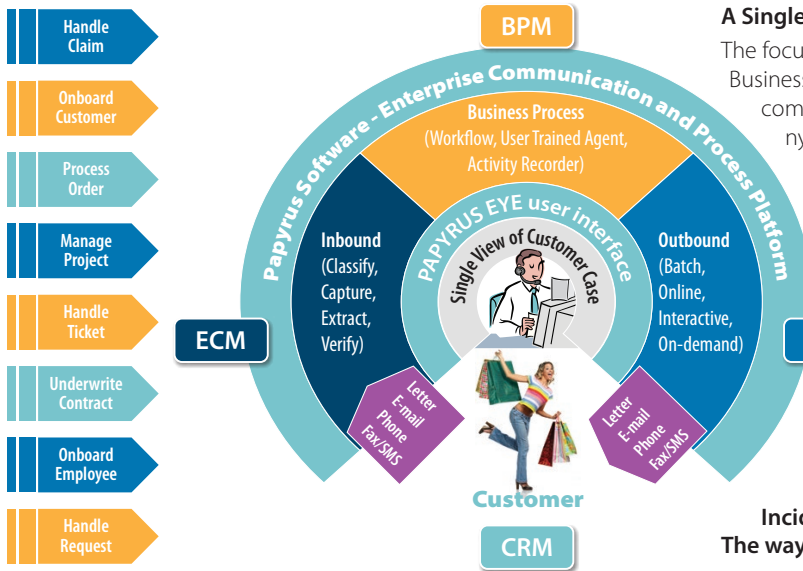
All channels are presented in a unified view to understand which communication has taken place via which channels (inbound & outbound), even when crossing channels in parallel conversations. Monitoring and reporting tools provide evidence that communications get delivered in a timely manner and help identify problems at the earliest point in a conversation.

## Online Channel Business Correspondence

Doing business online is of critical importance for your organization's existence and connects you fast and conveniently to customers, prospects and partners. Online channel services can be fully managed by business teams and offered via Wizard-assisted Webforms for customer self-service through your Website or mobile app directly linked to your back office for operational support.

# A NEW WAY OF WORKING - ADAPTIVE CASE MANAGEMENT

**Adaptive Case Management** puts people at the center of a process and allows them to intervene and apply their judgment and expertise to adapt to concrete business situations and create exactly what they need, when they need it to achieve the best possible outcomes. In ACM, business users can DESIGN while they EXECUTE.



## A Single View of All Customer Activity

The focus lies on Digital Transformation, Customer Experience (CX) and Business Empowerment with a 360° view of the customer – positioning companies to interact with customers and partners as ‘one company - one voice’.

## Make Enterprise Content Available to the Fingertips of Knowledge Workers

Easy access to all documents and content plays a key role in boosting productivity of knowledge workers in sales and customer service. Organizations need to bridge the silos and provide intelligent content services with unified content and processes within a business context to employees across enterprise teams – from anywhere to anywhere - to effectively connect, collaborate, up-sell, cross-sell and work on one single version of truth.

## Incident Management / Ticketing – The way to Customer Engagement Excellence

Most customer service solutions cannot keep up with today’s customer engagement requirements, as customers want to experience fast response to their inquiries or reported issues using preferred channel of communication. Papyrus Ticketing serves as a new system of engagement across a number of departments, helping companies increase employee productivity and deliver top-notch service for enhanced customer satisfaction.

## Facilitated Integration With Existing Applications And Devices

Learn about SOA Adapters with support for a wide range of protocols:

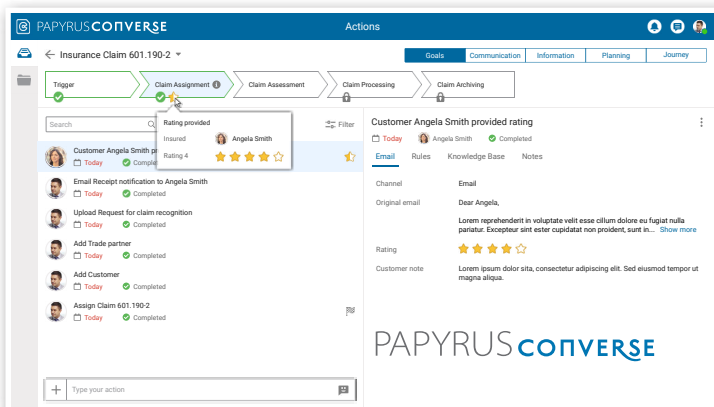
- Online channels/portals - Web Services, SOAP, HTTPS
- E-mail/Notifications – SMTP, POP3, MAPI, IMAP, SMS
- Mainframe - JES 2/3 & CICS, MQ
- Databases - Oracle, DB2, MS-SQL, ODBC
- Business Application integration - SAP, Social, Mobile-REST
- Java, .Net, MQ-Series, FILE, XML, FAX, VOIP, SNMP, LDAP, CMIS

## Building Value Streams: Get Your Ideas To Execution Faster

Organizations have a huge backlog in delivering digital business solutions – IT does not have the resources; professional services are associated with huge costs, and lengthy project implementations often lead to further shortage of IT staff and prevent modernization. Organizations thus need a new innovative approach that empowers the Business to model their ‘value streams’ with detailed processes and rules.

## Campaign Management / Targeted Messaging

The Papyrus collaboration platform for campaign management earned the highest honors for digital transformation excellence, agility and high value creation. With help of the Out-of-the-Box ACM Framework, customer’s Creative Services Teams are driving creation, modification and administration of a large number of marketing and regulated materials with more than 60 media types in nearly 30 languages, with efficient approval cycles that grant quality and compliance in a highly regulated business area.



Compliance  
Guidance  
Adaptivity  
Transparency



Validate Claim

Investigate Claim

Settle Claim

Pay Claim

Close Claim

# AGENDA

## 8.30 Welcome with Coffee

### 9.00 Keynote: The Push and Shove of Digital Speaker: Max J. Pucher - CTO Papyrus Software

Continuous change shapes our information technology world. It is no longer driven from inside a business but instead pushed and shoved by consumers and governments. That push comes from the progress in technology and the shove from a change in the business environment and governments. You are faced with the fact that the demands on security and privacy, a switch to mobile technology, augmentation of human skills and continuous availability in time and space have exploded. It has become of utmost importance to employ a strategy that will give the business both the necessary stability and security in their transaction processing and record keeping while providing a substantial upgrade in flexibility and adaptability in user and customer interaction.

### 10.00 Omni-Channel Customer Experience Speaker: Annemarie Pucher – CEO Papyrus Software

Excellence in Omni-channel support is the ultimate goal in achieving an outstanding customer experience.

- Engaging with both traditional and digital clients on one digital platform
- Striving to move beyond disconnected multi-channel communications (inbound/outbound)
- Allowing for real-time messaging and integration with existing applications

## 10.30 Networking coffee break

### 11.00 Unified document design by Business teams for physical and digital channels

A strategy for designing documents for print and digital, achieving a 'One Company - One Voice' customer communication.

- Best practices for creating highly personalized and consistent cross-channel business documents
- Single unified design for print, PDF and HTML reusing content building blocks across formats
- Inclusion of videos, graphics, charts, personalized messages and promotions
- Business teams create, extend and maintain templates and rules with the Business Designer
- Integrated versioning, Change and Release Management
- Migration from MS Word and other PC document formats

### 11.30 Preferred channel delivery with feedback loop

Powerful Postprocessing capabilities and the Automated Document Factory help you to move beyond disconnected multi-channel communications and lets you control your print and e-delivery operations.

- Best practices transforming from paper to digital
- Collect output in the Pool, bundle and augment each page with channel-specific information
- HTML5/PDF/SMS/e-mail/Mobile, printing considerations and available solutions
- Monitoring and reporting across e-mail, WebPortal, printing and archiving

### 12.00 Digital Business in Real Time

A Website or Mobile device provides public access as an integrated part of the whole Omni-channel network and is directly linked with operational users performing Adaptive Case Management.

- Real-time, responsive communications with back-office user integration
- Live Chat/Chatbot/Social/Web/Mobile interfaces
- Documents in real time with e-Signature
- Easy Onboarding for new products and services, e-Enrollment
- Claims submission, offer request, complaints

### 12.30 Incident Management / Ticketing in the Omni Channel World

A ticket can be a reported issue, a question, an inquiry, a defect or a change request processed over a period of time to achieve a solution or any other type of complex activity before being 'completed'. The out-of-the box Papyrus Ticketing framework is fast to implement, adaptable and configurable, and unlike alternatives provides your customer with the Omni-channel communication experience.

- A unified single user interface with a 360-degree view of the ticket case for higher productivity
- Adaptive processes for exception handling
- Ticket cases can have related tickets or dependent sub-tickets, all accessed directly from the displayed ticket

# AGENDA

## 13.00 Lunch

### 14.00 Automate and digitize inbound mail channels

Manage all your inbound channels by one single definition and by events, routing mail through the steps of classification, recognition and data extraction to validation and distribution to users in different departments.

- Supervised learning and continuous improvement of the intelligent data capture
- User-trained, multi-channel Inbound Capture
- Integration with existing hardware, software and applications
- System monitoring and auditing

### 14.30 Content Management for the Empowerment of the Collaborative Work

Knowledge workers need all information at their fingertips when processing a case. Customer service and call centers must find, view, send and possibly resend information. WebPortal access to documents and e-mail utilizes the short-term archive to control and monitor real-time, responsive communications with back-office user integration.

- Distributed depots, retention periods, GDPR
- Drag-and-drop or directly scan into Archive
- Automatic indexing for full-text search
- Archiving of complete case, annotations and comments
- E-delivery, Mobile and Cloud support

### 15.00 Campaign Management with Targeted Messaging

Creative business teams plan a campaign that stretch across multiple channels. They create the marketing content as text, image or video building blocks and define rules for including such content into highly personalized data-driven business correspondence per e-mail and paper.

- Creating personalized marketing messages
- Integration with data and definition of rules for the Campaign
- Delivery management (e-mail, SMS, portal, Mobile, paper)
- Tracking, monitoring and reporting with feedback loop (bounced, clicked, opened)
- Campaign performance analytics

### 15.30 Adaptive Case Management – Building your Value Streams!

See the full range from straight-through processes through dynamic processes to completely unstructured processes driven by rules and ad-hoc content arrival, such as scans, e-mails, PDFs, and mobile content. Experience **Papyrus Converse** which brings a whole new perspective on how to externalize business knowledge and implement 'value streams' that are smart and adaptive. Papyrus Converse uses a new method to define, plan and execute 'value streams' that are governed and described within the business architecture based on business language. Business rules are critical to guide the effort of users toward objectives and reduce risk by ensuring compliance.

- On-boarding, recruitment, time management, work task management, lead management
- Adaptive and goal-oriented business processes supporting exception handling
- Enhanced quality and speed of customer service case resolution
- Collaboration and knowledge work
- Desktop, Browser, Mobile, Cloud

### 16.00 Ask the expert session

Discuss with the ISIS Papyrus management and solution architects:

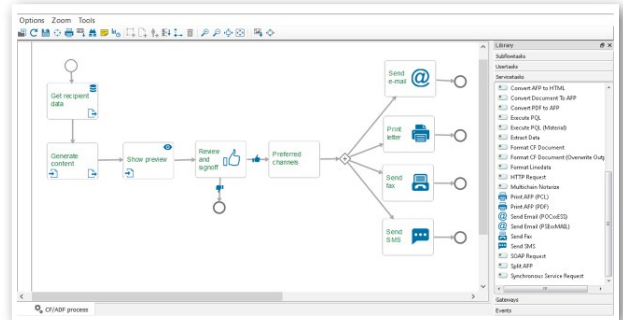
- Translating company goals into a strategy that consolidates ECM, CRM and BPM
- Optimizing your investment by building an agile communication platform for the future
- Discuss the requirements for the business graphical user interface (GUI)
- Integrating inbound and outbound communication as a business need

# A REAL-WORLD EXPERIENCE

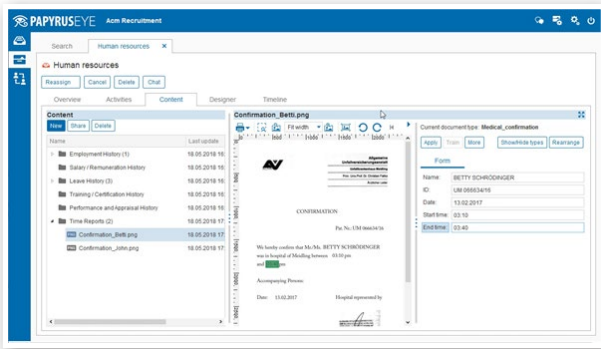
Inbound Mail Data Capture Freeform and Handwriting



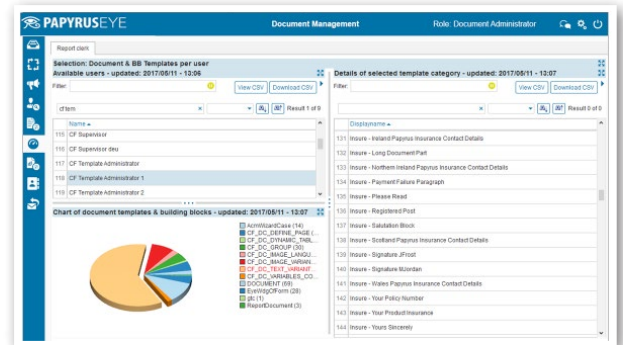
Output Management Process Definition



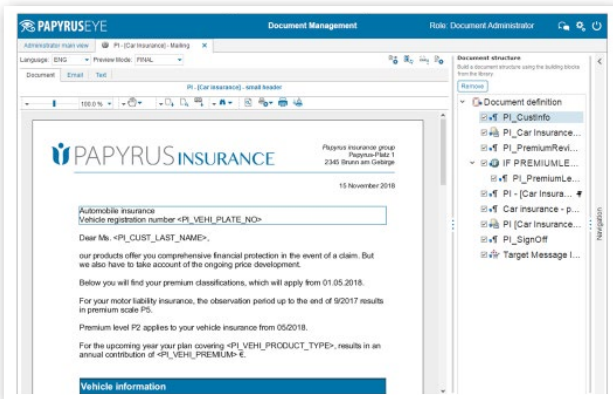
User Trains Machine



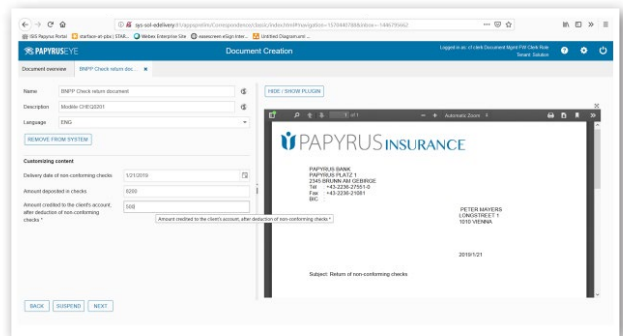
Papyrus Monitoring and Reporting



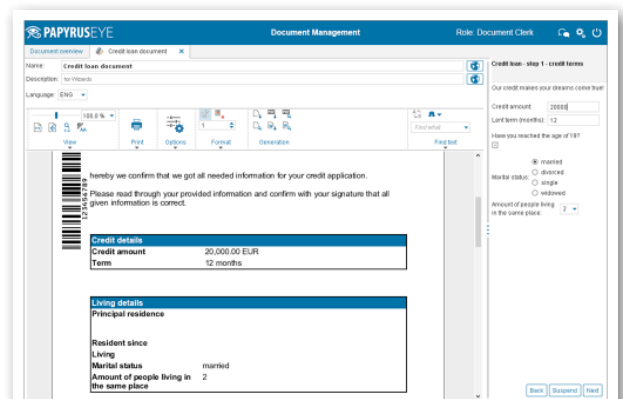
Document Design with Business Designer



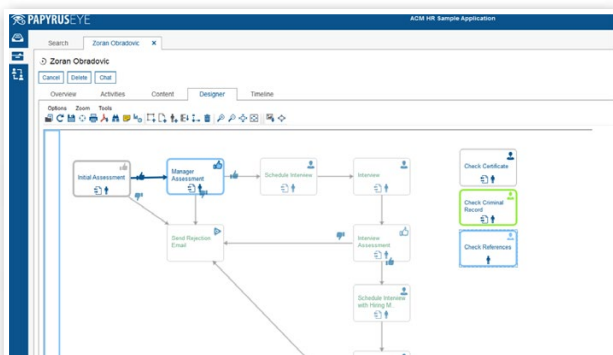
Web Business Correspondence



Wizard-Driven Interactive Documents



Unforeseen Events and Ad Hoc Tasks



# GENERAL INFORMATION

## Conference Location

### ISIS Papyrus UK Ltd.

Watership Barn  
Kingsclere Business Park  
Kingsclere, Hampshire, RG20 4SW  
Tel: +44 (0) 1635-299 849



## Registration

To register for the 2018 ISIS Papyrus UK Open House and User Conference please register online:  
[www.isis-papyrus.com/register-OHUK](http://www.isis-papyrus.com/register-OHUK)

## Hotel Reservations

We are happy to arrange your accommodation if required, please contact us with your travel details so we can assist you.

## Fees

The Open House and User Conference is free of charge. Registration is required.

## For more information please contact:

For any question, please feel free to contact the event team per e-mail or phone:

Tel +44 (0) 1635-299 849

E-mail: [events.uk@isis-papyrus.com](mailto:events.uk@isis-papyrus.com)

*"An interesting and very productive conference.  
Personal interaction can really not be replaced."*  
-Helvetia Insurance, Nils Gommans, Team Lead  
Document Systems

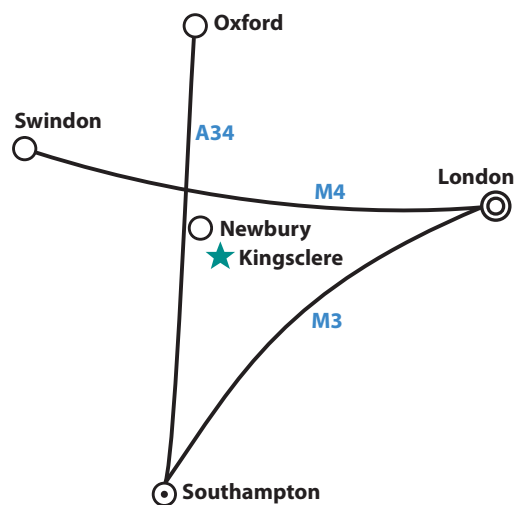
## How to get there

### From the M4/A34

- At Junction 13 take/continue A34 going south
- Continue down the A34 till you reach the Tothill Junction and exit the A34
- Take the first exit for the B4640 and follow this road till you reach the A339
- Take the second exit onto the A339 heading east towards Basingstoke
- At the 4th roundabout you will take the first exit for Union Lane and turn left immediately into Kingsclere Business Park.
- Follow the road to left through the brick gates and around to the last barn on the site.

### From the East/M3

- Leave the M3 at junction 6 (sign posted Basingstoke)
- Then at roundabout take the 2nd exit onto the M3 SPUR (sign posted Town centre) Entering Basingstoke M3 SPUR
- At Black Dam Roundabout take the 2nd exit onto Ringway East - A339 (sign posted Ring Road (N), Town Centre)
- At roundabout take the 2nd exit onto the A339 (sign posted Newbury)
- At roundabout take the 2nd exit onto Kingsclere Road - A339 (sign posted Newbury)
- At roundabout take the 3rd exit onto Union Lane
- Turn left into Kingsclere Business Park
- Follow the road to left through the brick gates and around to the last barn on the site



# ISIS Papyrus Worldwide

## *United Kingdom*

**ISIS Papyrus UK Ltd.**  
Watership Barn  
Kingsclere Business Park  
Union Lane, Kingsclere  
Hants, RG20 4SW  
T: +44-1635-299849

## *International Headquarters, Austria*

**ISIS Papyrus Europe AG**  
Papyrus Platz 1  
A-2345 Brunn/Gebirge  
T: +43-2236-27551  
F: +43-2236-21081  
E-mail: info@isis-papyrus.com

## *US Headquarters*

**ISIS Papyrus America, Inc.**  
301 Bank St  
Southlake, Texas 76092  
T: +1-817-416-2345

## *Asia-Pacific Headquarters*

**ISIS Papyrus Asia Pacific Ltd**  
9 Temasek Blvd. #29-01  
Suntec City Tower 2  
Singapore 038989  
T: +65-6339-8719

## *Italy*

**ISIS Papyrus Italy Srl**  
via Monte Navale 11  
10015 Ivrea (TO)  
T: +39-0125-6455-00

## *France*

**ISIS Papyrus France SARL**  
21, Rue Vernet  
75008 Paris  
T: +33-1-47 20 08 99

## *The Netherlands*

**ISIS Papyrus Netherlands B.V.**  
WTC World Trade Center  
Zuidplein 36  
1077 XV Amsterdam  
T: +31-20-799-7716

## *Germany*

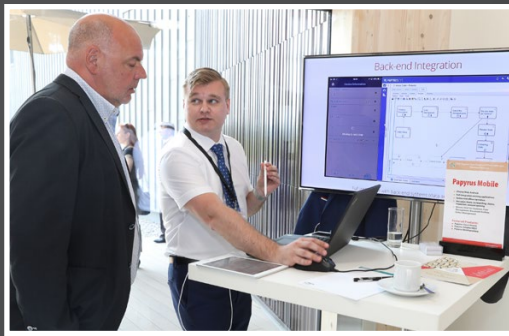
**ISIS Papyrus Deutschland GmbH**  
Heerdter Lohweg 81  
40549 Düsseldorf  
T: +43-2236-27551

## *Nordics*

**ISIS Papyrus Nordics ApS**  
Science Park Scion DTU  
Diplomvej 381  
2800 Lyngby, Denmark  
T: +45 8827 6170

## *Spain*

**ISIS Thot SL.**  
Sainz de la Calleja, 14  
28023 Madrid  
T: +34-91-307-78-41



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