



INNOVATE

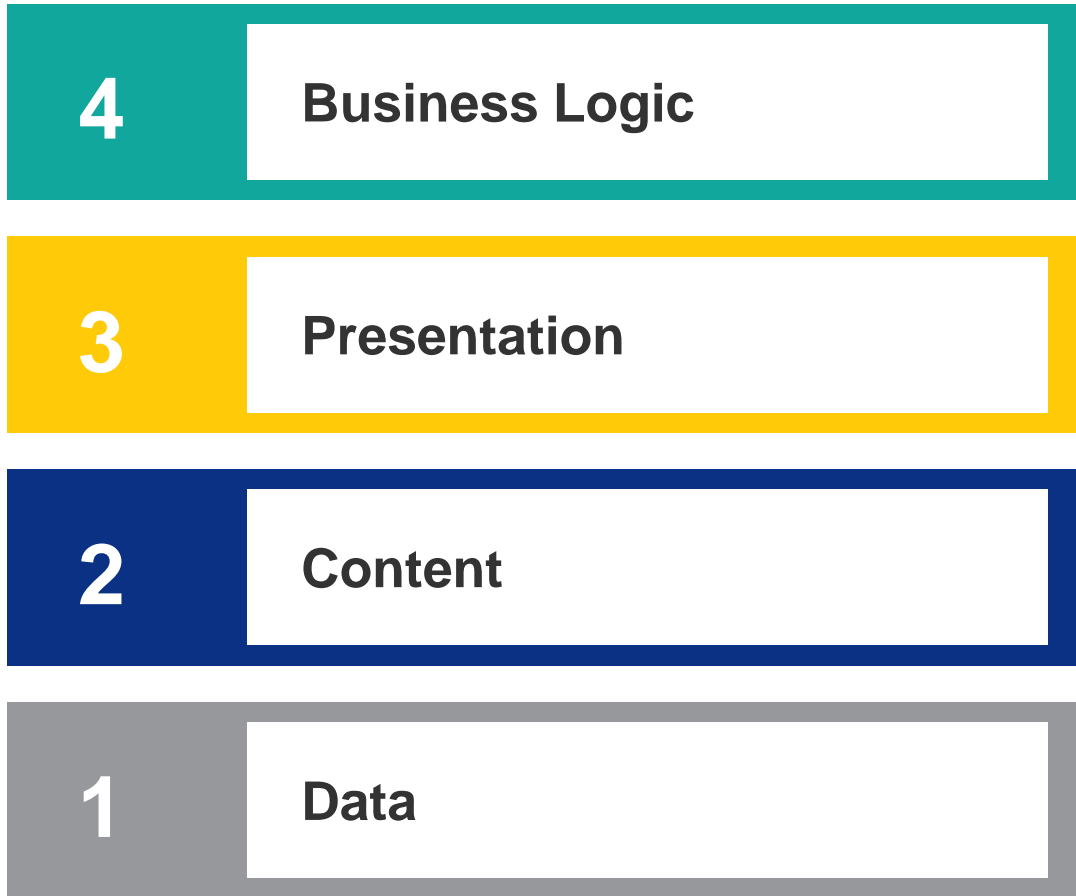
Digital Transformation Made **SMARTer**

Rationalize your Documents the Right Way

Afthab Badimoole, Project Manger at Smart Communications

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4-Layer Model

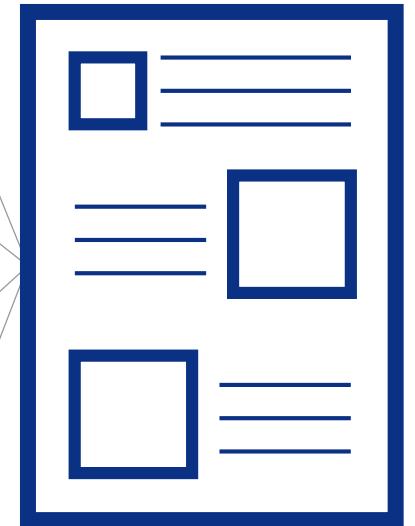


Assembly Rules

Layout/Style Sheets

Shared Content

Data Model



Template

Rationalize?

- Efficient
- Creation of documents efficient
- Leverage Smart Communications
- Observations and findings

Rationalize

- Optimize
- Use Shared Content
- Efficiency
- Maintenance

Redesign

- Meet Corporate Standards
- Consistency

Pain Points



Share any personal experience

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Rationalization

Legacy Documents



Step 1 – Confirm inventory

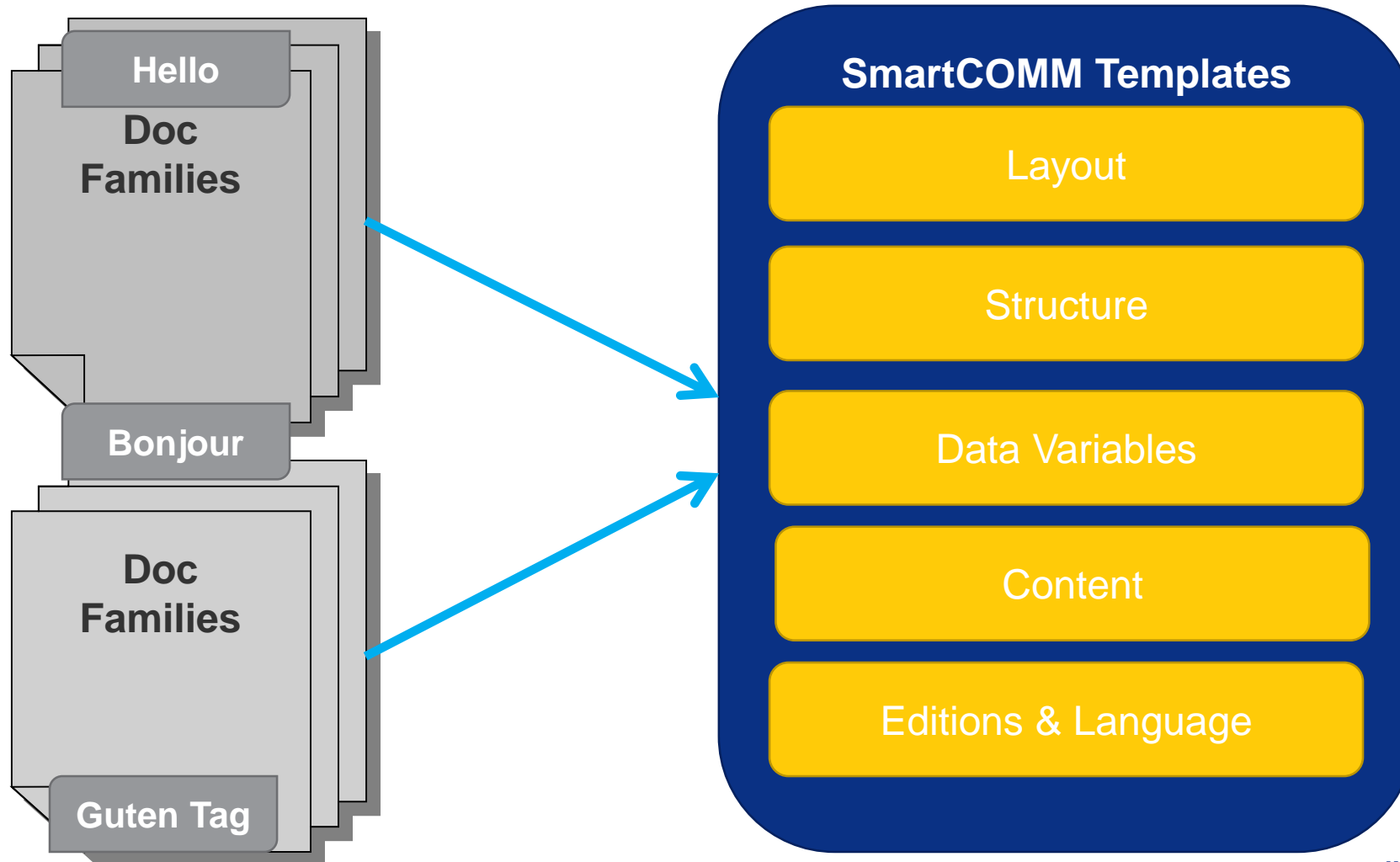
Step 2 – Acquire template samples

SmartCOMM Templates



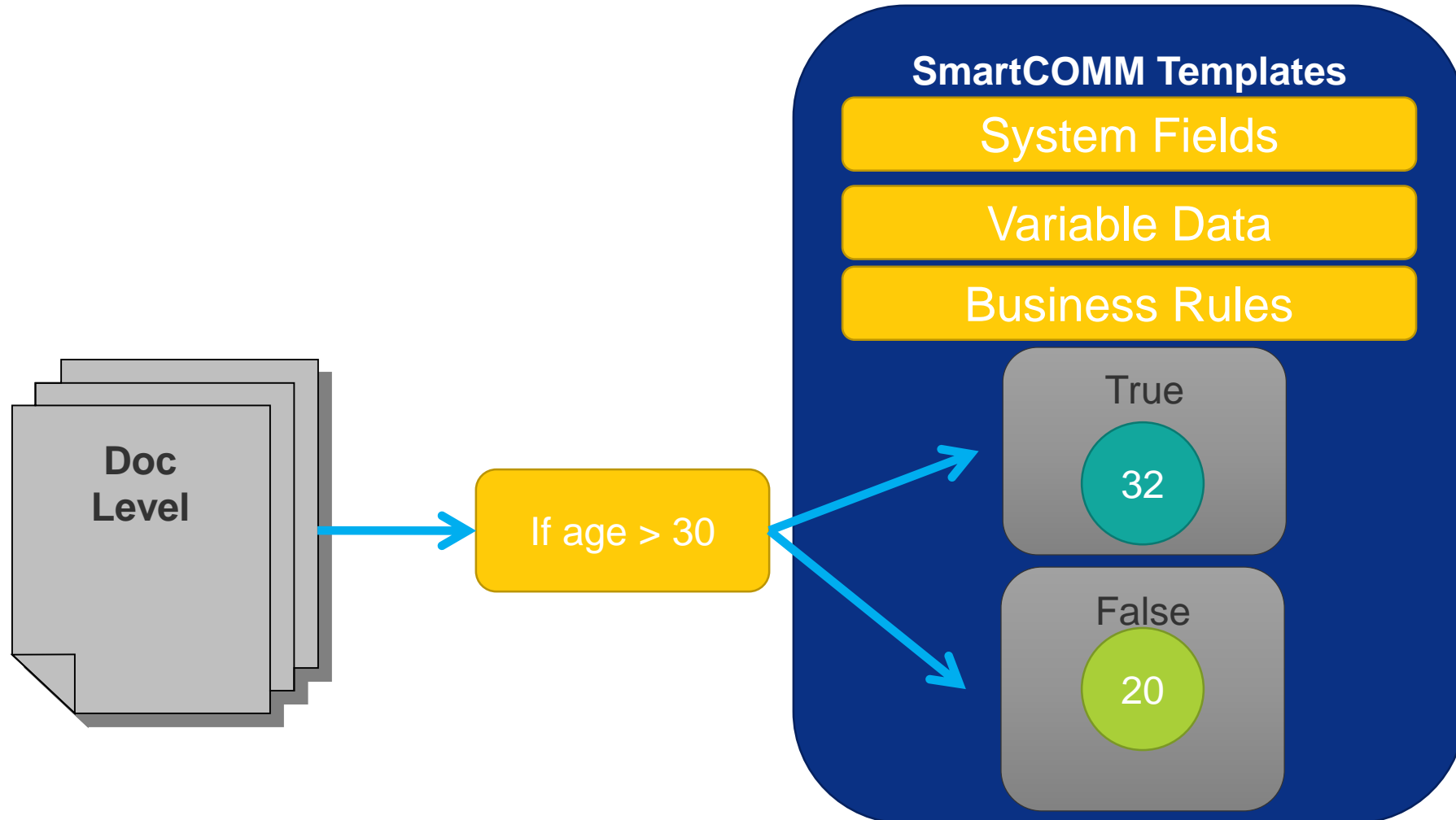
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Document Families



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Document Level Rationalization



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Specification example

9/22/2009

TEST RECORD 06
3010 W Yorkshire Dr
Apt # 1234
PHOENIX, AZ 85027-4545

Remove whitespace
IF no 2nd line address

Account Ending In: 1111

Dear [REDACTED]

You recently inquired about the charge(s) on the above referenced account from **Marmot Hotel**. We advised you that we would be placing the charge(s) of **\$230.78** in suspense while we researched your inquiry. That investigation has now been completed.

IF Reason Code = XYZ

American Express does not dictate merchant policy and our contractual agreements with our merchants state that credit or a cancellation may only be given if the guest provides a valid cancellation number. In view of this, we regret to inform you that we must reapply the charge to your account. You will be billed on your October 2009 statement.

Finance charges will be adjusted accordingly.

For future reference, please see the below explanation of how the American Express Assured Reservations Program works:

When you call a participating hotel to make a reservation, your reservation is guaranteed by giving your American Express Card Account number. If you change your plans, you must cancel the reservation and it is mandatory that you obtain a cancellation number from the hotel as proof. If you do not cancel your reservation or appear at the hotel by their cancellation deadline, you will be billed for one night's stay (i.e. a "no show" or "guaranteed reservation" charge).

If you have any questions or if we can be of further service to you, please call the telephone number on your statement and speak with a Customer Service Representative.

Sincerely,

H. Figueroa

H. Figueroa
Customer Service Supervisor
Dispute Reference Number: 10011111

10011111

The issuer of this card is American Express Bank, FSB

3A0770 TRS CSAU PR1818A 10011111 TRMUNGM10010001

GMS Barcode area, To be cut.

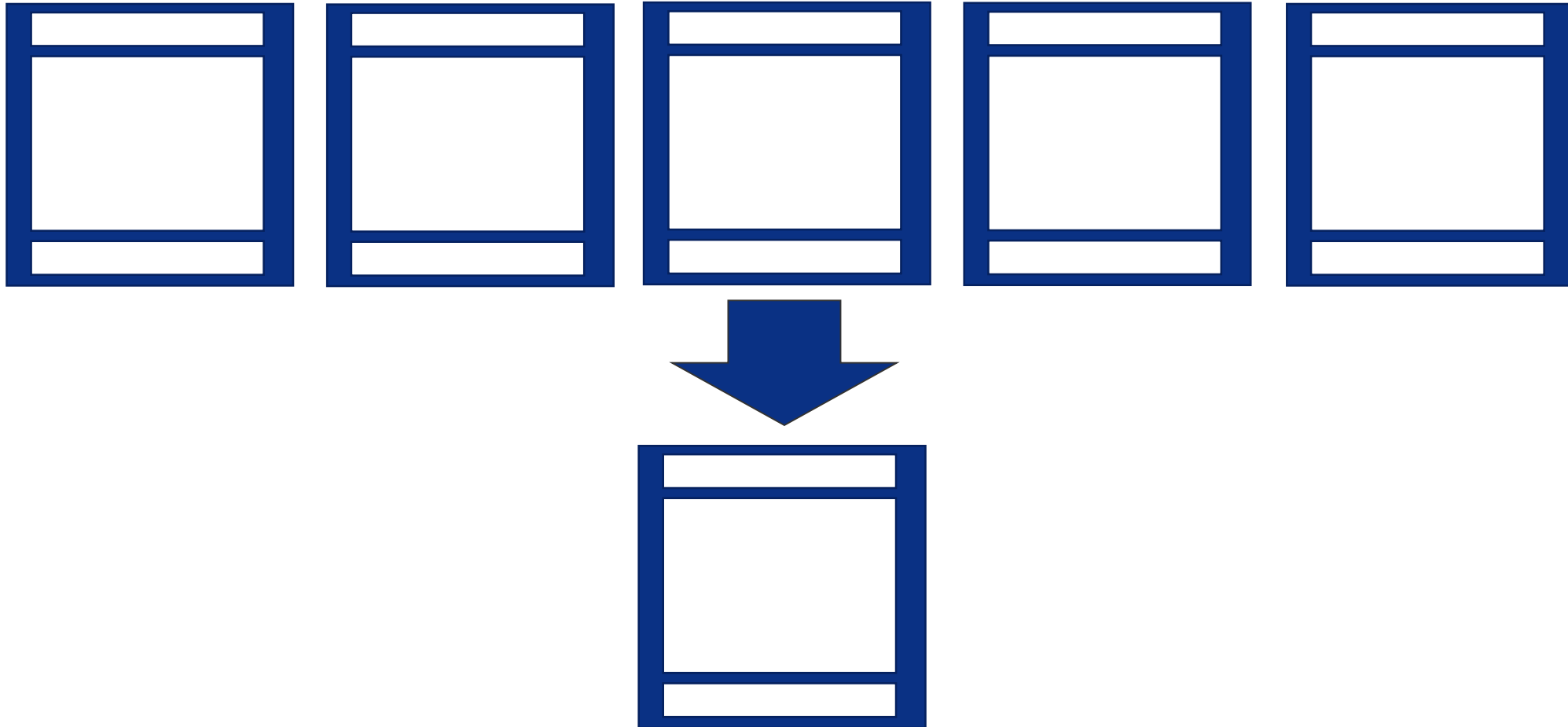
Not to be used.

- Variable Data
- Shared Content
- Rules
- Business User Edits
- System Generated

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Merge Communications Together

Focus of Rationalization: Consolidation & Standardization



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Shared Content

What is a good number?

Do not add because content is replicated in another template

Can be images, tables, sections

Variable data

- Pass only required fields

Shared content inside shared content

Structure the CMS using a tiered approach

Establish standards

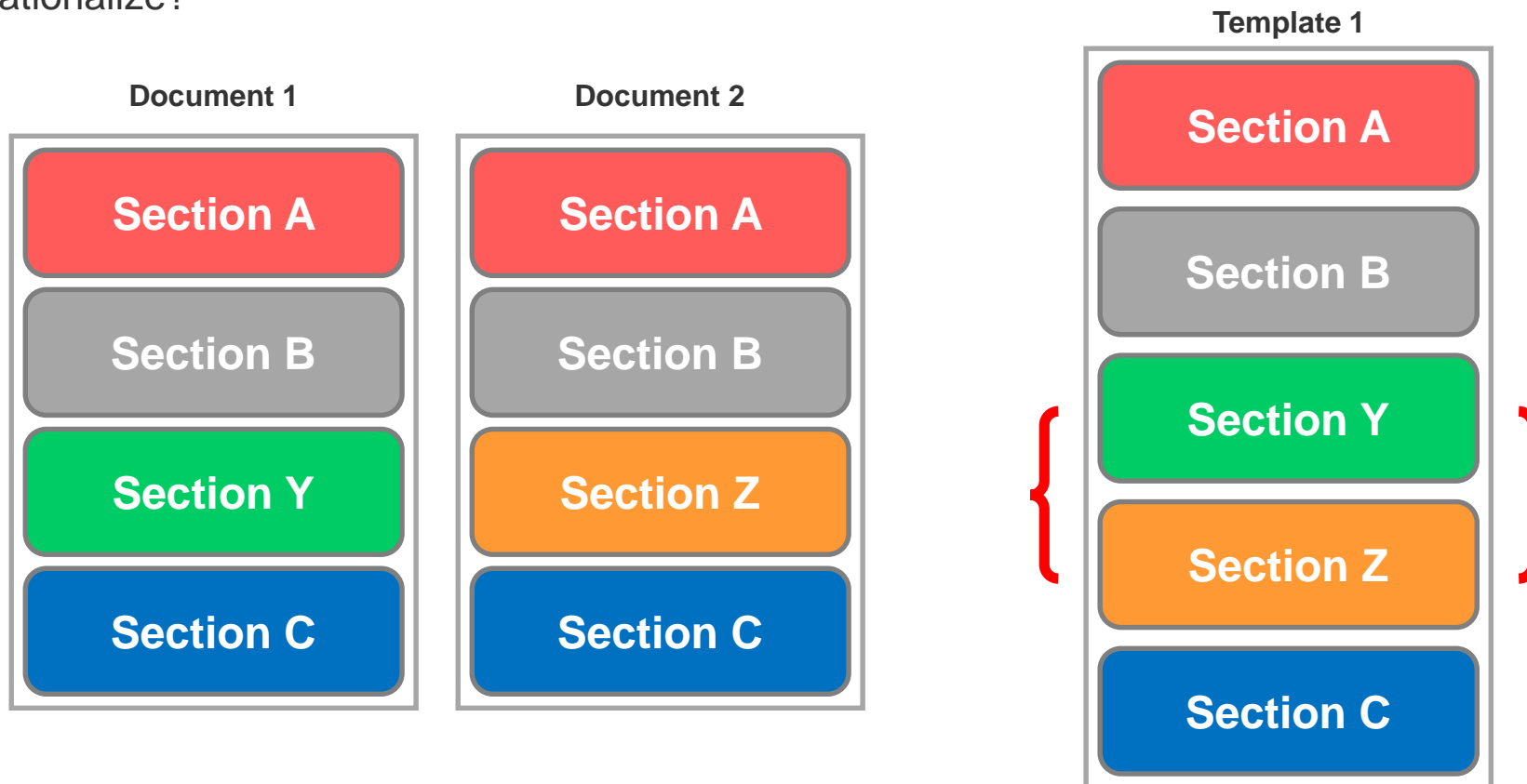
- Use date fields when available
- Keep layouts simple
- Utilize base templates

Content ownership

Rationalization: Example 1

In this example, both documents contain common content and some differing content.

How would you rationalize?



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Rationalization: Example 2

In this example, the documents have one piece of content that is similar or the same, but most of the content in the documents are different.

How would you rationalize?

