

Setup & Preliminary Implementation Questionnaire

Outsourcing a critical business process is a big step for any size organization but please take comfort in the fact that we've done it many times and will be able to foresee and prevent many problems. It has been our experience that setting up and running a new process is much less intrusive and stressful than clients expect. If you currently have a process in place, keep it working until your satisfied with the new and hopefully much improved one.

If its determined that we are a good fit for each other, then we will setup a secure FTP directory to receive data samples and proposed document designs. The most critical part of any setup is for us to understand how your data is structured and how you want it displayed (document composition). Consistently exported and properly mapped data will make the process run smoothly and quickly.

Please fill in the answers to the questions that follow and return to us by the most convenient means.

StatementOut fax number is (978) 658-2427

Email to mryan@statementout.com

Phone: (978) 694-0000 x 226

1. Who will be our primary point of contact in your organization? This person should be able to answer questions pertaining to your current data format and desired document composition.

Name: _____

Email: _____

Phone: _____ Alt Phone: _____

2. The following is necessary for us to have an understanding of the scope of this job.

A. What is the anticipated volume of documents per cycle? (How many get mailed?)

B. What is the mailing cycle? (Example: Daily, Weekly, Monthly, Quarterly, or sporadic.)

C. What is the name of the software program you use to generate data? (If known)

D. What data formats can be exported? (Example: Delimited Text, XML, print file, PDF)

E. What size paper and envelopes do you use? (Example: 8.5 x 11, #10 Env, #9 Env)

F. Are your documents single page, multi-page, or both?

G. What is the largest possible number of pages going into an envelope?

H. Can everything in your document be laser printed in black or grey scale?

I. Do you wish to use preprinted color forms? (see below)

The most cost effective means of using color in transactional documents is to print in volume using an off-set press. If color is required, StatementOut will acquire and warehouse the forms for our clients. We will need the graphic files required for printing, usually they are Adobe Photoshop, Illustrator, or Quark files. We do not currently print variable data in color, it's still too expensive. If you do use preprinted forms, they will appear on our web viewing services with the appropriate color.

J. Will you be using double window delivery envelopes with our permit number?

If the answer is yes, we have stock envelope sets that will likely suite your needs.

If the answer is no, we will have to preprint envelopes with the appropriate return address, permit number, and ancillary endorsements. Your permit number must be valid in Boston, MA. We can help with this if necessary.

K. What type of inserts will be included in the delivery envelope other than the statement pages and reply envelope?

L. Do you want Electronic Delivery Options? (Emails to you clients)

If the answer is yes, we will discuss this further. There are many issues to think about when it comes to electronic delivery; email address maintenance, end-user support and registration, email kickbacks, spam filters and so forth.