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Omeda Achieves Massive Productivity Gains with Content Services in the Hybrid Cloud

IDT Automates Complex Processes for New Efficiencies in the Digital Age

In the media industry, the task of managing subscriber data has always been daunting. Now, with more audience data flowing from the internet, email, and web-based media—plus publishers' demand for more sophisticated audience tracking and segmenting—circulation management companies face a real challenge.

Privately-held **Omeda**, Northbrook, Ill., the nation's largest B2B subscription fulfillment service provider, sought and succeeded with an internal, digital process transformation to meet those demands.

Today, the 35-year old company offers the 700-plus brands it serves a real-time Audience Relationship Management platform.

"Our services now fully transcend the old circulation management model, connecting data from multiple touch points—digital, events, subscriptions, as well as offline," says Bryan Swartz, Senior Vice President of Operations. "It's a 360° operational view, and enables our customers to select their own marketing segments to ultimately monetize their data."

Managing three million subscriptions monthly requires daily attention to data governance. "Our data integrity needs to be spot-on," Swartz says, explaining that Omeda also provides audience analysis to make that data actionable and profitable for customers.

Finding ways to keep internal processes as efficient as possible as the company transformed and expanded its services became a critical area of investment.

CASE HISTORY:



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Bryan Swartz
Senior VP of Operations
Omeda

Streamlining a Dated System

Omeda's business process for capturing and processing audience data coming from the various channels is complex, combining internal staff with an outsourced data entry service—a process that requires files to be continuously compiled, moved, completed and then returned—all in a timely manner.

Subscription data is imaged in-house and sent to the service in daily batches via email for transformation into spreadsheets. Spreadsheets then return to Omeda for customer access, tracking and billing.

To support this process, Omeda developed and coded its own software and expanded on it as its business evolved.

When in 2016 it acquired Hallmark Data Systems, a provider of complementary marketing services for media owners, Omeda inherited two software technologies: CAPSYS® CAPTURE, used to electronically capture documents and data, and OnBase by Hyland®, an enterprise information platform that combines information management, process automation & case management capabilities.

This meant Omeda now had two systems that processed customer data in a completely different way.

Even before the acquisition, the limits of Omeda's homegrown software were apparent: the workflow process had far too many manual touch points; and there was no formal technical support or ongoing development in place to meet the demands of their growing business.

“With our legacy imaging software, we were imaging and sending 100 plus batches daily, with each batch requiring 30-45 minutes to prepare from start to finish,” explains Renee Sigfred, Omeda's Processing Manager. “When the files were returned, the reconciliation process required manual intervention.”

Given these limitations, and the inherent advantages of Hallmark's technology, Omeda's management decided to go forward using the branded software to combine customer data from both companies into a single, more efficient information management and automated workflow solution.

Omeda engaged Hallmark's original consultant and solution provider, [Integrated Document Technologies](#) (IDT), Itasca, Ill., to assess, review and recommend a strategy to utilize the combined strengths of CAPSYS CAPTURE & OnBase software to improve daily operations and meet their evolving needs.

Content Services in Hybrid Cloud

Efficiency, proper technical support and long term cost-savings were key requests made by Swartz and the Omeda Processing Team.

“We were looking for a systematic process to track data being sent to our vendors; opposed to our manual process,” notes Sigfred.



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Processing Manager
Omeda

IDT's team worked closely with Omeda to dissect the current workflow processes and determine how to eliminate as many manual steps as possible.

"IDT's team came in and sat at the desks of our operators to understand all of the steps they went through to process the data. That was something I did not expect," explains Swartz. "We are a complex business servicing the unique needs of many customers. It's not easy for someone from the outside to digest what we do. The entire IDT team was 100 percent committed to understanding our business first, instead of just trying to sell us a piece of software."

Following its analysis, IDT returned with a new vision for Omeda's business workflow and software recommendations to solve their specific challenges.

"Understanding our unique business challenges is an important initial step for us to solve problems. We've seen hundreds of workflows in a variety of industries, and there are almost as many available products to solve them," says Mike Nolfo, president of IDT. "For Omeda, our goal was to replace a multi-step, error-prone process with a streamlined, automated solution that leveraged the investment in content services technology already gained by the acquisition."

IDT's recommendation was to move both the OnBase content services software and the CAPSYS CAPTURE data and document capture software from being housed on premise into the Cloud. Ultimately, Swartz chose to keep OnBase on-premise while leveraging CAPSYS CAPTURE in the Microsoft Azure Cloud, effectively providing Omeda with a hybrid cloud solution offering.

Using a hybrid approach allowed Omeda to prioritize its cloud migration strategies to take effect over time, rather than tackling too many migration projects at once. Eventually, says Swartz, OnBase will be migrated to the cloud as well.

"Data and document capture in the cloud is a low-cost and very secure method of solution deployment, making it a good option for many companies," adds Nolfo.

The data capture software Omeda was already using was simply switched to CAPSYS' cloud option, **CAPSYS® CAPTURE ONLINE**. This software provides robust functionality for information management systems and fully integrates with OnBase.

CAPSYS CAPTURE seamlessly interacts with OnBase to create and store image folders, identify and sync spreadsheet data, even generate emails automatically to update the Omeda processing staff on file status.

"The real underlying value of CAPSYS CAPTURE ONLINE vs. other capture platforms is its extensibility using RESTful API micro services which provide direct, real-time integration into the ShareBase EFSS, workflow, content repository and Omeda's internal line of business systems, all while delivering time-sensitive content and notifications safely and securely to Omeda's offshore partners," says Nolfo.

IDT recommended a new software component, **ShareBase by Hyland™**, a cloud-based filing sharing extension to its OnBase content services platform. ShareBase enables Omeda to more easily share documents with its offshore partners and worldwide customers.

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“We liked having a suite of capabilities from one content services provider, in addition to standard document retrieval and storage,” says Swartz. This new component further automates Omeda’s business processes, adds speed and security—plus provides more data tracking controls.

New Efficiencies Gained

The new software and refined workflow process implemented by IDT have been in place since July 2017, allowing Omeda to process data far more rapidly and efficiently.

“Now we simply type in a couple commands, scan the documents and send them out for compilation,” notes Sigfred. “That’s a drastic change from our previous process that contained several prompts and lots of file movement, making it easy to lose your place and have to start over.”

Daily volume gains have also been dramatic: No longer limited by time and a labor-intensive process, Omeda is now preparing nearly 400 data batches in a single day—compared to its previous 100 plus per day.

“The reduction of manual touch points in our day-to-day operations is a huge advantage,” Sigfred adds. “We’ve gained back significant work time. Now, one batch takes only a few minutes to complete from start to finish.”

In addition to workflow efficiency, Omeda benefits through improved data quality and an enhanced ability to track each step in its entire workflow process.

“My favorite part of the new system is having a systematic check and balance in place,” says Sigfred. “We went from manual checks and balances to a platform that provides reports and analytics to help us better manage our data.”

As for the ultimate measure—cost savings—Swartz expects the company will reap a return on investment in less than two years.

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New Information Management System Benefits for Omeda

- » Reduced manual labor and errors
- » Increased throughput using existing personnel
- » Faster delivery of daily data batches
- » Enhanced communication to and from external vendors
- » Increased data control and document security
- » On-demand content access for staff and auditors

Future Expansion and Lessons Learned

The move away from its custom developed and maintained software to a highly configurable, scalable, enterprise-class software platform positions Omeda well for realizing future internal efficiencies in other departments.

The company plans to use the new capture and content services system deployed by IDT to more fully automate its mailroom operations, and, to eliminate bottlenecks and improve reporting in human resources, accounting and legal.

What advice can Omeda offer to other companies seeking to improve on their internal Content Services systems? Swartz recommends bringing in an expert consultant like IDT—and not telling them what to do.

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OnBase and ShareBase are registered trademarks of Hyland Software, Westlake, OH.

About Omeda

The most successful media companies deploy audience intelligence across entire organizations to provide insight and catalyze innovation. We believe that understanding audience behavior, content engagement and event participation is the intellectual foundation for driving better decisions about existing product investment and new product launches. Omeda was founded in Chicago by The Obermans, a family of trade publishers who understood the value of utilizing technology to properly segment and target their subscriber base. Over the years, as technology advanced and customer needs evolved, our core capabilities expanded to encompass print, email and web-based audience solutions. Along the way, we have invested in modern infrastructure to capitalize on strong processing power and to maintain the most sophisticated data matching capabilities. Through our commitment to the media and publishing industry, we remain privately-owned and relationship-focused, remembering that we only succeed when our clients thrive in these rapidly changing times. company to do business with. For more information, please visit Omeda.com.

About IDT

Integrated Document Technologies (IDT) helps companies eliminate paper at its source, offering consulting services and a full line of content management, data and image capture and process automation products including hardware and software systems and Internet-based electronic solutions. Since 1992, IDT has put its sole focus on creating customized document management solutions for companies in diverse industries, serving as a one-stop resource for design, integration and long-term system support. With system installations nationwide, IDT's expertise as a system designer and integrator continues to expand as new document management technologies become available. Contact IDT at 630.875.1100 or visit www.idt-inc.com.

About Hyland

Hyland is a leader in providing software solutions for managing content, processes and cases for organizations across the globe. For over 25 years, Hyland has enabled more than 19,000 organizations to digitalize their workplaces and fundamentally transform their operations. Named one of Fortune's Best Companies to Work For® since 2014, Hyland is widely known as both a great company to work for and a great company to do business with. For more information, please visit Hyland.com.

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