

## Day-Timers, Inc. Stays on Schedule With OCR for Forms™

When Day-Timers, Inc. — the company that makes personal organizers to fit all kinds of scheduling needs — chose “It’s All About You” as its slogan, the company meant it. Since 1947, Day-Timers has been determined to keep that promise to its customers — partially with the help of OCR for Forms™, installed in the mid-’90s.

Customer demands for scheduling products had become fairly complicated, so Day-Timers needed a lot of forms: preprinted reminders for reordering, catalogue order forms, acquisition forms for prospective customers, two-sided personal page forms for custom-printed calendars ... well, you get the idea. Of course, the volume had increased tremendously, too, and so had customers’ expectations for ever-faster turnaround times.

Some orders for Day-Timers’ products came from large chains such as Office Depot, Staples and Office Max, but others — many others — came from individuals. These individual orders were received in the mailroom or sent via fax to the company’s Lehigh Valley headquarters in East Texas, PA, then entered manually. Day-Timers’ data entry operators were unable to keep up with the workflow, and Day-Timers needed options.

For help with the problem, Day-Timers called KeyMark, Inc., a systems consulting group based in Piedmont, SC. After surveying Day-Timers’ needs, KeyMark CEO Jim Wanner and President Jim Henderson had a solution: OCR for Forms, information capture software designed by Microsystems Technology in Tampa, FL. They knew from experience that OCR for Forms would help Day-Timers maintain its leadership position in the industry.

Wanner and Henderson started off by thoroughly researching the details of Day-Timers’ situation.

While Day-Timers had definite forms processing troubles, the company had a reservation about using OCR for Forms. If the forms used by the company had to be redesigned to make the software work properly, OCR for Forms could cause more delays than it cured.

“Not to worry,” said Wanner, who simply used Day-Timers’ own forms in demonstrating OCR for Forms to company officials. The tests went well,

so well, in fact that Day-Timers decided OCR for Forms was a perfect fit, and gave KeyMark the go-ahead, installing OCR for Forms for use with Day-Timers’ renewal forms.

### Training and Service

Installation began in December of 1996. Three months later, OCR for Forms went live, first with renewal forms, then with introductory offers for prospective customers. A key individual in its preparations was Pat Confer, a group leader whose areas of responsibility included data entry, spreadsheets and workflow issues. Although Confer had no formal technical training, her natural computer apti-

tude was good. She was given two crucial tasks: attend Microsystems’ week-long training session in Tampa, then fully train Day-Timers’ staff back home in OCR for Forms’ procedures.

Day-Timers’ success with the software speaks both to the company’s own active participation in the process and to the excellent training that Microsystems provides for its clients from the early stages onward. “We’ve had no calls for support,” notes Wanner, interpreting Day-Timers’ lack of need for ongoing assistance as testimony to the quality of Microsystems’ products and training.

### Nuts and Bolts

The realities of Day-Timers’ adoption of OCR for Forms are nothing less than impressive:

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OCR for Forms easily integrated into Day-Timers' existing environment. Currently, Day-Timers scans in 26 different types of mail-order forms with a Bell + Howell 6338 duplex scanner. Able to enter at least 60-65% of all orders through OCR for Forms, Day-Timers has processed as many as 6,500 forms in a day with the software.

OCR for Forms boosted Day-Timers' productivity. The software allows operators to complete forms at a rate that's three to eight times faster — depending, of course, on the type of form that's being processed — than if the documents are keyed in by hand.

The bottom line: OCR for Forms is paying off. Day-Timers' expected ROI was on schedule for the entire period. Each customer's order is processed quickly, efficiently and accurately. And Day-Timers is still leading the field in time management and organizational solutions.

#### **Building on OCR for Forms**

Day-Timers was so pleased with the benefits of OCR for Forms that it looked for an opportunity to integrate some of Microsystems' companion

software. In Fax Manager™, Day-Timers found a tool to more efficiently handle the increasingly high volume of orders that are faxed into the company.

"The benefits here are terrific because Fax Manager begins the process immediately," notes Wanner. By receiving, sorting and routing faxes to user-defined directories or printers for accurate, unattended processing, Fax Manager has the ability to take orders on up to 32 fax lines. The orders then proceed through a single PC directly into OCR for Forms. Because Fax Manager allows Day-Timers to skip the scanning stage entirely, the company can realize even greater savings.

"It's crucial that we have a productive and efficient way of getting our orders processed," adds Confer, who has been promoted to image processing specialist due, in part, to her role in the successful adoption of OCR for Forms. "The business world moves at such a fast pace. And, after all, we are a time-management organization!"



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