



# Choosing a Document Generation and Document Automation Solution

The Xpert's Guide of What to Know Before You Buy

From compiling complex quotes and creating detailed invoices to generating highly personalized policies or contracts, Xpertdoc enables companies to solve industry-specific document challenges through features that make creating, managing and delivering documents better, faster.

## But what do you need to know before buying such a solution?

This guide sums up what to look for when selecting a document generation and document automation provider.

## BENEFITS FOR ORGANIZATIONS

A document generation and document automation solution allows you to generate highly personalized, data-driven documents by using information from core systems such as CRM, ERP, CPQ, policy administration, and more to create PDF, html and other document formats based on templates.

- **Reduce** time spent on document creation
- **Automate** the creation of standard forms and documents with templates
- **Eliminate** document errors
- **Enforce** branding and formatting
- **Streamline** business processes
- **Improve** customer experience

## IDEAL FOR ALL TYPES OF DOCUMENT



Proposals



Contracts



Quotes



Invoices



Policies



Claims



Agreements

And more!

## KEY CAPABILITIES CHECKLIST

The checklist below summarizes the key considerations to take into account when examining and selecting the right document generation and document automation solution.

Key Capabilities	
<b>Document Generation</b>	Start from a pre-built document template or create a brand new document to address almost any use case.
<b>Data Merge</b>	Merge data from any enterprise core systems and data sources (CRM, ERP, CPQ, in-house databases, spreadsheets, and more) into your documents.
<b>Template Design</b>	Create responsive, data-driven templates that integrate graphics and multimedia content, and configure complex workflows and business rules – quickly and easily using a Microsoft Word-based editor.
<b>Conditional Content</b>	Ensure documents have the right messaging with logic-based rules for including or excluding content.
<b>Workflows</b>	Leverage existing workflows and business rules to deploy, send and store documents.
<b>Delivery Options</b>	Omni-channel delivery options include the ability to send documents via email, e-signature applications, print, fax, SMS or using our APIs, save documents as attachments in your CRM or store documents in SharePoint.
<b>Document Repository</b>	Archive and house all generated documents in a secure and central location.
<b>Company Branding</b>	Add your company logo, change colors and insert rich media.
<b>Mobile Support</b>	Create, edit, negotiate and sign documents anywhere, anytime, from any device.
<b>Document Formats</b>	PDF, .doc and .docx, html, and more.

## TECHNICAL REQUIREMENTS CHECKLIST

We have compiled a list of key technical features and functions that should be supported by a powerful document generation and document automation solution.

Document Creation	
✓	Ability to create documents using templates/standard text sections, images, logos, videos, etc.
✓	Ability to add specific smart identification elements to a document – for instance barcodes and QR codes.
✓	Creation of forms and documents that include smart functions, allowing recipients to fill in and return documents in an electronic format to an insurer’s back-end system for further treatment (e.g. new business submission, medical questionnaire).
✓	Ability to offer secured, encrypted access to customer data and information through identification from an electronic document (e.g. access to information about premiums pending).
✓	Electronic signature support.
✓	Ad hoc document generation (e.g. customer correspondence).
✓	Batch document generation – high volume, low data complexity (e.g. annual policyholder statements).
✓	Batch document generation – high volume, high data complexity (e.g. policy packages).
✓	Automated printing and assembly processes (e.g. job control and reconciliation tools).
✓	Ability to link business documents with additional information – for instance a billing statement that includes text about a sales promotion or discount in place.
✓	Ability to prioritize information flows between different systems feeding the document composition engine.

## Document Delivery

✓	Ability to send documents via web message center (PDF or html) or email (PDF).
✓	Ability to send documents via social media communication vehicles (Facebook, Twitter, LinkedIn, Xing, Viadeo, etc.).
✓	Ability to send documents via SMS or web portals.
✓	Ability to share documents via robo-advisors, chatbots, etc. through straight integrations or APIs.
✓	Ability to send or integrate documents using an insurer's mobile application (smartphones, tablets).
✓	Creation of multiple print streams.

## Document Management and Storage

✓	Creation of templates to automate document generation and store resulting documents in a repository or archive for future retrieval.
✓	Ability to create and change the internal business user interface to allow easy creation of documents supporting multiple channels - web, email, SMS, social media, fax, print.
✓	Document collaboration tools (e.g. check in/check out functionality).
✓	"Review and release" functionality for customer correspondence.
✓	Ability to create and manage rule-based workflows for documents (e.g., intelligent routing, workflow queues, etc.).
✓	"Search and retrieve" capability for templates in a repository or archive.



**Request a demo  
of Xpertdoc's powerful document  
generation and document  
automation solution!**