Consulting Engagement Process

LEARNING THROUGH DISCOVERY
TYPICAL CHALLENGES

- Need for document lifecycle process improvement
- Dissatisfaction with current process
- In-house processes not performing
- Budget challenges
- Internal alignment issues

SERVICE INEFFICIENCIES & BUDGET IMPLICATIONS

DISCOVERY WORKSHOP
Turn to Pitney Bowes Management Services and book a Discovery Session. Let us work with you to find the answers.
A Discovery Workshop is a collaborative meeting designed to bring together key stakeholders to have a candid discussion about current solutions or services, and to identify and develop consensus on opportunities for improvement with greatest business and cost impact.
WHAT IS A DISCOVERY WORKSHOP?

A WORKING SESSION TO FOCUS ON CLIENT’S KEY BUSINESS PROBLEM

ATTENDEES
Key management, key stakeholders and decision makers from:
- Line of business owners
- Finance, IT and procurement

PREPARATION
Workshops are most productive when we understand current state as well as your strategy, priorities, and goals for the area of focus in advance.

APPROACH
An in person facilitated session to confirm and gain alignment on issues and develop potential initiatives and desired outcomes.

OUTPUT
A deliverable that:
- Summarizes current state and describes the vision of end state solution
- Lays out prioritized opportunities and recommendations in a high level framework and roadmap
Our consultants create **recommendations** in all areas of the document life cycle addressing issues such as:

- Effective targeting for marketing campaigns
- Multi-channel message delivery
- Marketing supply chain and print sourcing
- Customer data management
- Message personalization and effectiveness
- Managed output workflow analysis
- Document retention and compliance
By leveraging our experience, workshop attendees are able to gain **insight** and **clarity** into the issues relating to their specific situation.

**The benefits as you move forward:**

- Recommendations and implementation roadmaps specific to address their business issues
- Builds alignment among internal stakeholders
- Empowers clients to quickly understand process and technology changes possible
- Accelerates the move towards solution, implementation, and change
- Gain access to high value consultants and insights from vertical and application experts
WHY DO A WORKSHOP WITH PITNEY BOWES?

➔ Work alongside PBMS consultants; experts in your industry, to analyze business processes, identify pain points and uncover opportunities, while reducing costs and improving efficiencies with high value solutions.

➔ As a business partner, we invest in your company by providing a consultant to analyze your business solutions to address your business needs.

➔ We assign highly experienced executives as the workshop champion to prepare and execute the program to help your business accelerate to the next step, overcome your challenges, and service your needs.