HMI Performance Incentives

TUNGSTEN AUTOMATION

HMI
Performance
Incentives

HMI Performance Incentives Drives Loyalty Program Engagement with an Easy Claims Process

Loyalty programs are a powerful way to foster engagement—and HMI Performance Incentives aims to help its B2B clients achieve this goal. To inspire more customers to engage with its clients' rewards programs, HMI Performance Incentives enhanced its OnDemand Engagement Platform with intelligent automation from Tungsten: empowering customers to submit their proof of purchase using a smartphone camera.

HMI
Performance
Incentives

91%
Faster Claims Submission, Reducing Friction

44%
Increase in Claim Activity, Driving Engagement

90%
Revenue Boost, Enhancing Loyalty Program Outcomes

"To drive up participation and boost the performance of the [Polyglass rewards] program, we looked for a way to deliver a seamless experience for every participant."

Lincoln Smith,
Chief Strategy Officer, HMI Performance Incentives

MEET HMI PERFORMANCE INCENTIVES

Headquartered outside Boston, MA, HMI Performance Incentives is a global leader in designing and managing sales and customer incentive solutions. With nearly 40 years of experience in the performance improvement industry, HMI Performance Incentives builds programs geared to help boost profit margins, increase customer or employee engagement and capture market share.

PRODUCTS IN USE

• Tungsten TotalAgility®

FOCUS

• Mobile Data Capture
• Optical Character Recognition (OCR)
• Claims Processing

Challenge

HMI Performance Incentives knows that effective rewards programs can transform occasional customers into passionate advocates. Since 1980, the company has partnered with leading B2B companies to help them design, manage and maximize the performance of their incentive strategies.

Lincoln Smith, Chief Strategy Officer at HMI Performance Incentives, explains, "Our clients include many Fortune 1000 companies, who work with us to differentiate their offerings and build market share. By analyzing the data our programs generate, we help our clients answer questions such as: 'which customers have the highest propensity to purchase?', 'who are the strongest competitors for our target customers?' and: 'what trends are developing in our market?'"

Operating in the B2B space, many of HMI Performance Incentives' clients are businesses that go to market via the channel. Because products typically pass through multiple different partners on their way to the end consumer, identifying the stakeholders responsible for selling products down the channel is vital to drive effective loyalty programs.

Through its OnDemand Engagement Platform, HMI Performance Incentives provides a secure, cloud-based portal for clients to engage with and reward their customers, their sales personnel, or their channel partners.

Polyglass, a leading manufacturer of roofing membranes and coatings, is one of HMI Performance Incentives' largest clients. In the U.S., Polyglass sells through hundreds of building products wholesalers and distributors, which sell through to the contractors who ultimately use the products in roofing projects.

"We knew that invoices from wholesalers and distributors contained a wealth of valuable information about the customer base for Polyglass products across the U.S.," continues Lincoln Smith. "To help capture these insights, we created a reward program for roofing contractors. By submitting proof of purchase for a Polyglass product—typically, an invoice from a wholesaler and distributor—contractors earn points to redeem for awards such as Polyglass products, merchandise, travel and events."

In the past, submitting proof of purchase to the Polyglass rewards program was a time-consuming process. Contractors needed to scan paper copies of their invoice, upload the scanned copy to a portal on the Polyglass website, and then re-key information such as the Polyglass product family, stock-keeping unit (SKU), invoice data, invoice number, and total purchase price into web forms on the site.

MEET DOCUMENT IMAGING GROUP

Founded in 2006 and based in Mahwah, NJ, Document Imaging Group is a leading provider of business process automation and content management solutions. Document Imaging Group enables organizations to accelerate mundane transactions, free staff to perform higher-level functions, remove human error, and drive performance on the bottom line.

MEET DATA CAPTURE GROUP

Headquartered in Londonderry, NH, Data Capture Group is a specialist provider of data capture solutions and management of critical records. With solutions to automate the collection and transformation of data through document scanning, mobile capture, email and fax automation, Data Capture Group empowers organizations of all sizes to drive efficient operations.

"In recent years, the exploding popularity of mobile devices has driven a fundamental shift in consumer expectations around the speed and responsiveness of B2C services—and those expectations have carried over into the B2B space," continues Lincoln Smith. "We realized that friction in the rewards claim journey was discouraging many prospective users from engaging with the program. To drive up participation and boost the performance of the program, we looked for a way to deliver a seamless experience for every participant."

Solution

To solve the challenge, HMI Performance Incentives decided to enhance its OnDemand Engagement Platform with intelligent automation: eliminating the need for time-consuming, manual data entry in the Polyglass rewards program. Powered by TotalAgility—an integrated platform of data capture and robotic process automation solutions—the new approach empowers contractors to submit their proof of purchase using a photo from their smartphone.

"Of all the solutions we evaluated, we were most impressed with the Tungsten offering," recalls Lincoln Smith. "Tungsten brought together all of the core capabilities we were looking for in a single, tightly integrated platform. Crucially, TotalAgility is a truly automated solution. Because there's no manual re-keying of data behind the scenes, we can convert unstructured data (photos of invoices) into highly structured data (SKU numbers, line items, dollar amounts and more) at speed and scale."

To accelerate its deployment process for the new solution—named "Snap2Claim"—HMI Performance Incentives engaged the support of Tungsten business partners Document Imaging Group and Data Capture Group.

Walt Esker, Vice President of IT at HMI Performance Incentives, comments, "The support we received from Document Imaging Group and Data Capture Group was excellent. Both partners collaborated closely throughout the process, and their guidance was instrumental in helping us to define the workflows and business logic to realize our vision for the Snap2Claim offering."

Working closely with HMI Performance Incentives, Document Imaging Group deployed and configured TotalAgility in the Microsoft Azure cloud. Today, Document Imaging Group provides ongoing support for TotalAgility, and Data Capture Group meets regularly with HMI Performance Incentives to discuss new features and capabilities of the solution.

Today, contractors log into the Polyglass claims portal on their mobile device. Using a web app developed by HMI Performance Incentives and integrated with TotalAgility, customers can take a photo of their invoice and upload it directly to

the site. Next, the solution extracts all the relevant data via optical character recognition, structures and stores the data, and maps SKUs from distributor invoices to the relevant SKUs in the Polyglass product catalog. Finally, the solution credits the appropriate number of reward points to the customer's account—simultaneously delivering valuable insight into the sales performance of Polyglass products across the U.S. market.

"The difference between the old claims process and Snap2Claim is like night and day," adds Lincoln Smith. "Crucially, TotalAgility is constantly learning, which means our claims processing gets faster and more accurate with every invoice that customers submit."

Results

By offering contractors a seamless way to engage with the Polyglass rewards program, Snap2Claim is driving up customer participation. Equipped with this additional data, HMI Performance Incentives can deliver actionable insights that help Polyglass sharpen its competitive edge.

"In the past, we limited ourselves to collecting four data points in our claims process, but even asking customers to input that relatively small amount of data introduced a significant amount of friction in the process," explains Lincoln Smith. "Since integrating TotalAgility with our OnDemand Engagement Platform, we've cut the

average time to submit an invoice from four minutes to just 20 seconds—91 percent faster.

"Because capturing data from the invoices no longer has an impact on the customer experience, we've increased the number of data points we capture from four to eight. Enriching our data in this way is allowing us to dive deeper into recency, frequency, and monetary value, analyze the share of basket Polyglass is achieving, and reveal opportunities for Polyglass to drive incremental sales."

Since launching Snap2Claim, HMI Performance Incentives has created a virtuous cycle for the Polyglass rewards program. With a frictionless path to submit claims, the number of enrolled contractors has doubled. And thanks to deeper insight into customer preferences, HMI Performance Incentives can more accurately target its reward campaigns—driving participation and engagement higher still.

"Year-on-year, we've boosted claims activity by 44 percent and revenues attributed to rewards

customers by 90 percent, a 15-fold increase compared to last year," continues Lincoln Smith. "We measure our success by the success of our clients, and we are delighted that Snap2Claim is delivering such positive results for Polyglass."

Snap2Claim has already earned HMI Performance Incentives industry recognition, winning the Circle of Excellence Award for innovation from the Incentive Marketing Association.

"To help our clients to thrive, we need to capture deep insights into their customers' preferences and buying behaviors—and with TotalAgility at the heart of our rewards experience, that's exactly what we're achieving," concludes Lincoln Smith. "We aim to become the preferred partner for performance improvement in the B2B world, and we look forward to bringing the benefits of Snap2Claim to leading enterprises across the country."

Read more stories of success from our global customers at www.TungstenAutomation.com

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About Tungsten Automation

Tungsten Automation, formerly Kofax, is the global leader in intelligent automation solutions with a trusted legacy of nearly 40 years, with a team of 2,000+ employees in 40 countries, serving 25,000+ global customers. Our dedication to innovation and customer success has earned us industry recognition, including being named a leader in Intelligent Automation (IA), Intelligent Document Processing (IDP) and Process Orchestration by top analysts. We are trusted to help businesses gain unprecedented efficiencies and reduce costs through AI-powered workflow automations that propel their businesses into the future.

To learn more, visit **www.TungstenAutomation.com**

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