



# FORMS **IDEA BOOK**

**CURTIS1000**

A Taylor Company



# A FORMS SUPPLIER QUALITY CHECKLIST

Business forms support all kinds of transactions. However, many organizations struggle with how to reduce obsolescence and per-unit cost without sacrificing quality of their forms.

This guide can help you determine how well your organization's current supplier is meeting your needs for forms: the level of service, processes, technology and end-user satisfaction.

Simply go through the form and select "Yes" or "No" for each question. If you select "No" for any questions, you may benefit from talking with Curtis 1000 about our expertise in forms management for healthcare, financial services, insurance, manufacturing and retail.

To learn more, visit [curtis1000.com](http://curtis1000.com) > Forms.

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# IN-PERSON SERVICE

In an age of seemingly endless communication options, nothing is as effective as in-person meetings for building a truly collaborative partnership. Face-to-face communication helps establish understanding, trust and a personal connection.

1. Do you regularly see a representative from your current forms supplier in person? **YES NO**
2. Do the supplier's representatives take time to understand your organization's challenges, goals and priorities? **YES NO**
3. Does the supplier demonstrate a desire to have a long-term partnership by placing your needs first? **YES NO**
4. Is the supplier open and honest with you about their strengths and weaknesses? **YES NO**
5. Does your supplier participate in your forms committee? **YES NO**





# EASE OF DOING **BUSINESS**

A successful partnership is one that makes your life and work easier. From technology and communication to trust and shared vision, your partners should be able to anticipate and develop solutions that put hours back into your day.

1. Do you have a customized, configurable web portal for easy online ordering? **YES NO**
2. Can employees order forms online and check their orders before placing them? **YES NO**
3. Does your forms supplier also offer commercial printing for marketing and promotional products? **YES NO**
4. Is your supplier making life easier so you have more time to spend on other objectives? **YES NO**



# PROCESS IMPROVEMENT

No matter how efficient it may appear to be, no process is ever perfect. “There’s always a better way” is a belief that motivates continual improvement – and a tenet at the heart of any successful long-term business partnership.

1. Are all of your forms clearly numbered with a unique identifier for easy tracking and version control? **YES NO**
2. Does your forms supplier develop strategies to help you minimize obsolescence, reduce errors and improve response rates? **YES NO**
3. Does your supplier recommend ways to optimize design to make your forms less expensive to produce? **YES NO**
4. Does your supplier offer online proofing tools to facilitate content collaboration for quicker approval and faster turnaround? **YES NO**
5. Does your supplier’s salesperson suggest optimal order quantities based on usage history? **YES NO**





# TECHNOLOGY TRANSITION

When it comes to creating and managing forms, the impact of robust technology solutions can resonate across every area of an organization. Automating manual processes will save time, lower costs and reduce errors.

1. Does your forms supplier offer automated processes for designing forms? **YES NO**
2. Does your supplier's technology create an audit trail of approvals and revision requests for forms? **YES NO**
3. Does your supplier's technology enhance communication among forms committee members? **YES NO**
4. Does your supplier provide the technology needed to launch new forms content and workflows across your organization's different locations? **YES NO**
5. Does your supplier maintain a digital, searchable archive of previous versions of forms? **YES NO**



# BILLING PRACTICES

Accurate, consistent, punctual billing from your vendors is crucial for keeping your financial house in order. More broadly, good billing practices can indicate whether your partner is careful, well organized and watching out for your best interests.

1. Is your form supplier's billing clear, accurate and easy to understand? **YES NO**
2. Do your invoices match the amount you expected to pay? **YES NO**
3. Are you completely happy with the value you receive for the price you pay to your supplier? **YES NO**





# PERFORMANCE TRACKING

Establishing measurable goals is one thing; achieving those goals is another. A vendor of excellence will provide regular updates — and evidence — that the partnership is on track to achieve your short- and long-term success.

1. Can your forms supplier document at least 10% in savings during the past year by consolidating and eliminating forms?  
**YES NO**
2. Does your supplier routinely report back to you with progress against savings targets and with on-time delivery rates?  
**YES NO**
3. Are form backorders and stock-outs very rare? **YES NO**
4. Does your supplier send customized usage reports on a routine basis and whenever you request them? **YES NO**
5. Does your supplier have an established process for identifying and removing old inventory from your books? **YES NO**





# END-USER SATISFACTION

A dissatisfied user base can affect key performance indicators such as efficiency, productivity, loyalty and continual improvement. Clearly defined instructions, intuitive processes and user support channels are hallmarks of a partner intent on user adoption and success.

1. Is it clear to employees where they should turn to get the forms they need? **YES NO**
2. If there is a question or a problem with your organization's forms, do your employees know whom to call? **YES NO**



# STATE-OF-THE-ART FORMS SOLUTIONS

## Does your organization struggle to:

- Reduce obsolescence and per-unit cost while maintaining quality?
- Streamline ordering systems for accurate inventory management?
- Tap expert knowledge in security, design and engineering?
- Identify partners with a wide variety of solutions?
- Consolidate suppliers?

Curtis 1000 provides forms management, best-in-class service and competitive pricing. Our extensive national production network offers the lowest cost over a broad array of forms. From air bills to Z-fold mailers, Curtis 1000's high-performing documents are engineered for ease of use and mailing efficiency.

Please call us at **877.287.8715** or visit **curtis1000.com**.



## About Curtis 1000

Greater efficiency. Revenue growth. A stronger brand experience. Yes, you can have it all with help from North America's experts in business communication.

We'll help you leverage the latest technology and access the industry's broadest network of production and distribution capabilities. Think of us as your trusted advisor for enterprise communication.

## Featured products:

- Collated and continuous forms
- Cut sheet forms
- Form/envelope combinations
- Form/label combinations
- Informed consent forms
- Jumbo rolls (14" – 24")
- MICR documents
- Pressure seal mailers
- Secure documents
- Snap, unit and zip sets
- Tax solutions

## Certifications and proficiencies:

- SFI® and FSC®
- HIPAA
- HITECH
- MA 201 CMR 17.00
- PCI
- ISO 27001
- SSAE 16
- Sarbanes Oxley
- FISMA proficient
- GLBA



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877.287.8715 | 1725 Breckinridge Parkway, Suite 500, Duluth, GA 30096 | [curtis1000.com](http://curtis1000.com)

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