



William L. Broddy edp

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Overview

Bill Broddy is an industry-recognized advisor to large enterprises on compliance mail business processes (bills, statements, notices, etc.). He has assisted numerous organizations in the development, marketing and implementation of new products and applications in this arena.

With almost 30 years experience in transaction mail, he has developed a network of user and supplier contacts throughout the world. In addition, he has been long recognized as the guru of Cost of Printing.

He currently is providing consulting services on:

- ultra high-speed **color printer acquisition**
- implementation of **automated postal tracking** solutions
- implementation of **TransPromo** message management solutions

He was recently given Xplor: the Electronic Document Systems Association's most prestigious award, ***Xplorer of the Year***.

Xplor has also selected him to develop, launch and manage the upcoming "Document Production" series of certificate courses.

Significant Projects

Bill has played a significant role in a number of projects during his career. The following is an incomplete listing with a brief description of what the project accomplished. Additional details on these are available.

Xplor Document University



Development and delivery of 'Document Production' courseware

- Certificate classes qualifying for Continuing Education Units
- Over 100 students to date
- Co-sponsored by *acadami* and Xplor International

Theperfectbill.com



Contributing editor

- Series of articles that help large transaction mail producers improve the quality and effectiveness of their bill or customer statement
- Covers the nuts and bolts of TransPromo implementation

Multiple large transaction mailers



Ultra high-speed color printing support

- Needs analysis
- Current and future cost (avoidance) identification
- Co-requisite technologies
- Supplier procurement management (including development of RFP's)

Navy Federal Credit Union



Member statement design and production system analysis

- Analysis of current statement design
- Analysis of current transaction document production environment
- Recommendations for redesign and system improvement

Equity investment firm

Document software best-of-class analysis: 4Q2007

- Identification and prioritization of features and functions of 10 software offerings
- Usability analysis by feature for each offering
- Over-all usability ranking

Multiple software suppliers

Projects included during 2005-2007:

- Product line competitive analysis
- Industry application research

Canada Post*With Product Innovations*

- DTS Project - 2005
- Hybrid mail readiness review - 2005
- Great Statements project - 2006

Other

- Document Factory Survey 2000 -2001

*Manulife financial**Project Peacock: first published TransPromo application*

- Lead a team of Manulife, Prinova, Kodak, and Exstream personnel
- Developed series of conditional messages, life-style photos, and special layouts based on client information
- Presented at Xplor in 2002 and 2003
- Published in Canadian Printer: 2004

*Canadian Document
Factory Survey*

Bill developed and managed a three-year survey of the state of large mail production centers across Canada. The survey and analysis was funded by Pitney Bowes, Roll Systems, Canada Post and Industry Canada.

The survey interviewees represented the “top 50” transaction mail production sites in Canada, producing ~ 75% of Canada’s transaction mail

Industry Canada

As a follow-on to the Document Factory Survey, Industry Canada engaged Bill to conduct specific research into various hardware suppliers in the Canadian market.

Adobe Datalogics

Datalogics, Inc., an Adobe® Portfolio Company and a leading provider of innovative document technologies, engaged Bill to develop the business estimate, product launch and Independent Software Vendor engagement plan for the *Adobe MVS PDF Library*

Amex Canada Ltd.

Amex engaged Bill to provide an electronic delivery strategy for their monthly statements. Bill analyzed Amex Canada’s mail production infrastructure, researched multiple software and ISP offerings in this area, developed a “cost of delivery” model and reviewed the state of legislation regarding the legality of electronically delivered compliance documents.

IBM Printing



As Canadian product manager for IBM printing and publishing systems, Bill launched an “independent business unit” that focused solely on the sale, implementation and care of his product line. Due to its enormous success, IBM implemented the unit throughout the world.

IBM Boulder Lab



Bill Participated in defining market requirements for IBM’s Advanced Function Presentation (AFP) architecture (the dominant platform for transaction mail production globally).

Professional Experience

PARTNER & VICE PRESIDENT OF BUSINESS DEVELOPMENT, *Prinova Inc, Toronto,* *(July 1999 - Nov 2005)*

- Member of three-person ownership team that grew the business:
 - \$200K → \$3M
 - 3 people → 20+
 - One customer → 20+ Fortune 500 customers
- Drove Branding and product strategy
- Orchestrated key presentations and articles
- Led design and development of key Internet marketing tools
- Architected significant annuity revenue offerings
- Sought out and nurtured critical supplier partnerships
- Developed relationship with two key accounts

PRINCIPAL, *E-statements.com, Sharon, ON* *(February 1996 - June 1999)*

- Provided strategic consulting to both financial services and high tech firms.
- Projects focused on the enabling of Internet technologies for the electronic document delivery.
- Clients included:
 - Adobe Systems
 - American Express
 - IBM
 - Pitney Bowes
 - USS (now part of CGI)
- Provided market analysis and develop business plans

PRODUCT MARKETING MANAGER, *IBM Canada, Markham ON* *(January 1986-February 1996)*

- Responsible for highest regional “share of market” throughout corp.
- Recognized for developing critical financial model that:
 - Doubled market share
 - Tripled profit
 - Drown-proofed account for five years
- Model still in use after 15 years; still keystone of IBM strategy in business area
- Managed launch of dozens of hardware and software products
- Developed business area strategy, launch P&L and sales plan
- Developed future product requirements for both Canada and Latin America

- Managed marketing staff and dotted-line management of sales and pre-sales organization of 40+ people

MARKETING PLANNER

IBM Information Products Division, Boulder, CO

(July 1983-December 1985)

- Developed product and marketing requirements in non-US marketplaces for presentation architecture (AFPDS).
- Developed launch plan for first fully functioning hardware and software to exploit architecture (PSF and 3820).
- As a result of efforts, hardware and software launch exceeded expectations (4,000 units ordered in first day window versus 1,500 planned)

SALES REPRESENTATIVE

IBM Canada Ltd., Vancouver, BC

(May 1977-June 1983)

- Responsible for *sales of office document hardware and software for western Canada.*
- *Led world in sales of first office laser printer*
- *Architected document assembly vertical solutions for: petroleum, utilities, telecommunications and government*

Awards and Certifications

- IBM Development Achievement Award & Seven IBM 100% Clubs
- IBM Canada Achievement Award
- XPLOR Conference Curriculum Committee (2002 – 2003)
- Electronic Document Professional (EDP)
- Certification Commissioner (1996-99; 2003-present)
- XPLOR Committee on Advanced Technology (2000–02)
- EDP Certified (1993). First person in IBM Corp.
- University of British Columbia Senate (1976-77)

Publications

The perfect storm	<i>Theperfectbill.com</i>	July 2008
Is Color Really Making an Impact	<i>Document Magazine</i>	Oct 2007
Do Your Statements Measure Up?	<i>Document Magazine</i>	Aug 2007
Great Statements increase customer relations	<i>Canada Post</i>	Dec 2006
Statements: the Good, the Bad and the Ugly	<i>Document Magazine</i>	Oct 2006
Do you Pass the Test?	<i>Document Magazine</i>	Feb 2006
Project Peacock: generating Full Color Statements	<i>Cdn Printer</i>	Oct 2004
The World Series of Laser Printing	<i>Cdn Printer</i>	Fall 2002
Will the Post Office be Delivering Electronic Mail?	<i>Xploration</i>	Spring 2001
The effect of the Boomer on Machine-driven Mail	<i>On Demand Canada</i>	Mar 2001
The CRM Connection	<i>On Demand Canada</i>	June 2000
Fun and Xploring in LA	<i>On Demand Canada</i>	Apr 2000
Electronic Document Legislation	<i>eBiller Magazine</i>	Dec 1999
Tax Time: electronically intermingled forms	<i>On Demand Canada</i>	Dec 1999
Books on Demand	<i>On Demand Canada</i>	May 1999
The Importance of Documents in Customer Care	<i>On Demand Canada</i>	Feb 1999
Digital Directions: Contracting Development	<i>On Demand Canada</i>	Nov 1998
Document Composition: the Next Killer App	<i>On Demand Canada</i>	Sept 1998
Business-casing E-Statements	<i>Xploration</i>	Spring 1998
The Trouble with Typewriter Paper	<i>Xploration</i>	Spring 1994

Seminars

Document Production Best Practices	US and Canada 2Q2008
Fundamentals of Document Production	Xplor University 07 & 08
Color Statement Forum	Xplor University 2007
EDP Certification Course	2004 - Present
Color Statement of 2011	Xplor Global 2006
Electronic Document Legislation and Best Practices	Xplor Global: 2000-2003
Accessible Statements: Braille and Low Vision	Xplor Global: 2003-2004

Professional Associations

- Electronic Document Professional (1993)
- Re-certified EDP (1999, 2004)
- EDP Commissioner (1996-2000, 2003-present)
- EDP Commission vice-chair (2008 -present)
- Xplor Canadian Region executive (1994-96, 2005-present)

Education

B.A. History, University of British Columbia



For further information and insight please Google: ‘[“William Broddy”](#) OR ‘[“Bill Broddy”](#)’