

# TECHNOLOGY SHOWCASE

Agile Customer Communication



## Bank Correspondence Management System

Award-winning Adaptive Case Management Technology supporting:

- ▶ Simplification and flexibility of document management processes
- ▶ Productive collaboration of Business and IT
- ▶ Involvement of the right people for the right work at the right time
- ▶ Fast response to changes in business requirements
- ▶ Consistent design and compliance of content
- ▶ Improved document quality and reduced time to market

# Sustainable Innovation through Agile Customer Communication

## Adaptive process management boosts productivity at leading European bank

### The Business

As one of the largest players in the world with roots anchored in Europe's economic history, the Bank has presence in more than 70 countries and more than 180,000 employees. The Bank is a leader in the Eurozone and a prominent international institution with focus on Corporate & Institutional Banking as well as Retail Banking & Services, with over 30,000 collaborators and more than 2,000 agencies. The Bank garnered the 2016 WfMC Global Excellence in Case Management Award for its new "Banking Correspondence Management System" (BCMS) built on Papyrus Adaptive Case Management and its high-productivity enterprise communication platform.

### The Challenge

The Bank was using 2,500 different document templates for customer communication with approximately 20-25 new document templates per month, and planned to further enhance the number of documents by doubling batch output and significantly increasing online (Internet and mobile) production by a factor of 20 to total 400,000 documents a day.

At the same time, with customers moving to digital, the Bank recognized the need to move to smart communication anytime, anywhere and significantly speed production of new modules with quick time to market for new bank products through full digitalization and paper-free processes.



In the initial solution based on Microsoft Word, business users were creating document specifications as input for the document development process performed by IT developers, with both teams working in isolation and duplicating efforts. The communication mainly via e-mail and handling thousands of templates in different languages through the standard file management system prevented linkage between document templates and their language variants and versions. To accelerate the time to production, the communication development approach needed a complete makeover.

### Business Goals

- Smart communication anytime, anywhere
- Business user empowerment
- Increasing batch and online production by a factor of 20
- Fast time to market for new bank products
- Digitalization of communication processes
- Reduction of overhead
- Enforcing corporate identity, quality and consistency
- Simplicity and flexibility

### Functional Requirements

- Common working environment for efficient collaboration of Business and IT
- Agile cross-department change management
- Unified system for sharing work without e-mail dependence
- Efficient maintenance of thousands of design templates
- Management of document design and related processes for flexible online and batch production in one system
- Reporting and auditing transparency

## The Solution

After initial considerations, the bank decided to focus on the simplification and flexibility of document management processes as its two primary objectives. The Bank chose to introduce the Papyrus Business Correspondence Solution to enable business users to directly participate in document development and reduce overhead.

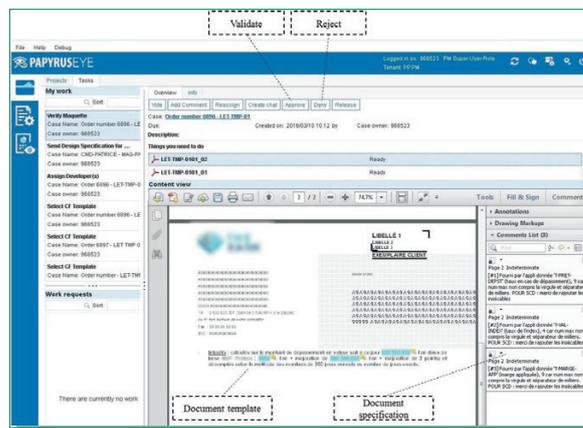
Next, the decision was made to leverage the Papyrus integrated framework solutions approach - fitting the entire document design and development solution directly into the Papyrus Adaptive Case Management (ACM) framework would maximize flexibility and transparency in handling the document lifecycle from design through development and deployment into production, as well as production management.

The newly defined Banking Correspondence Management System (BCMS) provides professional document design functions and empowers business users to create and maintain a huge amount of document templates in a flexible manner, with consistency in design and compliance of content. BCMS supports design, sign-off, deployment and production of customized, individual online correspondence, as well as mass batch document production, and applies a fully customizable and adaptive change management that involves the right people for the right work at the right time.

BCMS provides a common working environment for the productive collaboration of Business and IT and now links independent working environments of different departments to facilitate cooperation and teamwork between all knowledge workers.

Business teams work in different user roles specified by roles and privileges, supported by multiple GUIs with full capabilities to flexibly design the correspondence and take control over the document development process. IT assists where required and takes care of technical configurations related to more sophisticated document elements, such as data interfaces for input of business data, complex business rules or dynamic tables.

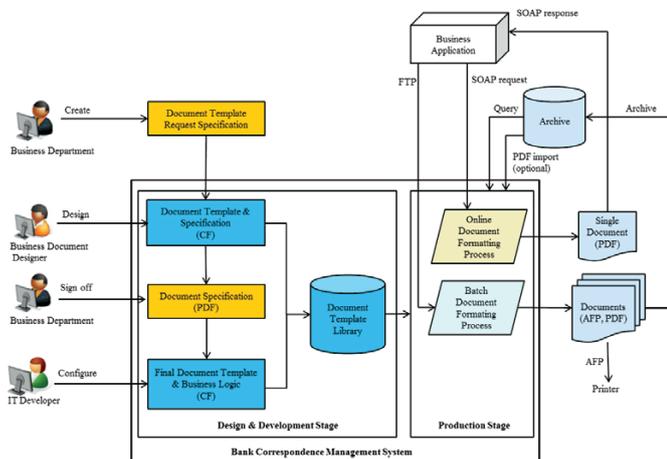
Document design is managed within a project (case) through a set of predefined steps and related data and enables ad-hoc changes and case re-opening by business departments to react on short notice to changes in the business requirements. Ad-hoc actions are managed and aligned by change management and compliance-checking techniques via ACM. All document design is released into the central correspondence library to be used by all entitled parties. Business users can choose from diverse elements in the library, and create new ones, while freely communicating with other system users through integrated commenting and chat functionalities and making use of the IT assistance where necessary. Finished document templates are sent to project coordinators to verify the development in a document compare view and approve releasing them into production.



Document design validation

## Achieved Benefits

- 95% of all communication created & maintained by the business, IT only delivers data
- 50% time reduction in the template development phase
- 90% time reduction in the release phase
- Flexible document release process enabled by cross-department change management
- Consistency paired with efficiency through large-scale reusability
- Reporting and auditing transparency



Overview of BCMS

## Papyrus Products

- Papyrus WebRepository
- Papyrus Designer Package
- Papyrus DocEXEC
- Papyrus DocEXEC/PDF
- Papyrus Adapter/SOAP
- Papyrus Client

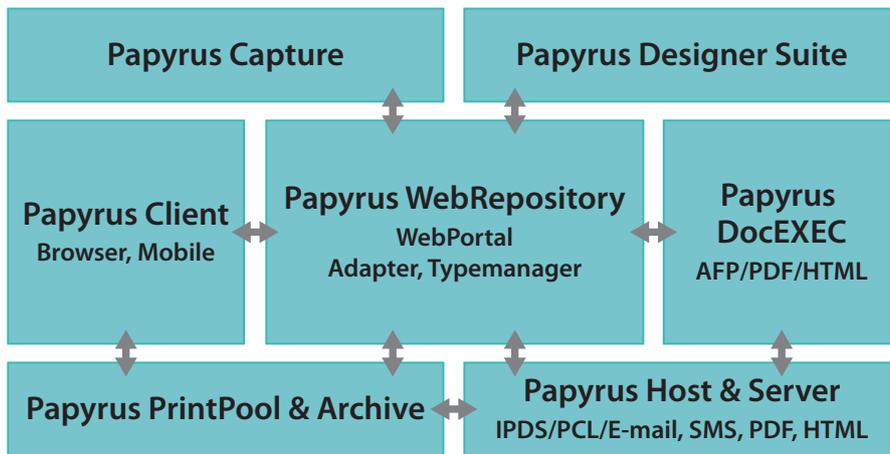
## Snapshot

- **Organization:** Leading European Bank (Finance)
- **Business Challenge:** Highly increased volumes of batch and online communication
- **Goals:** Efficient collaboration of Business and IT; flexibility and transparency from design to production; high-quality, high-speed communication creation; quick time to market
- **Integration:** Web Services
- **Solution Frameworks:** Adaptive Case Management, Business Correspondence

# Encourage Positive Change

The Papyrus High-Productivity Communications and Process Platform empowers enterprise business users and knowledge workers to optimize and align processes, tasks, communications and documents in service-based projects and organizations.

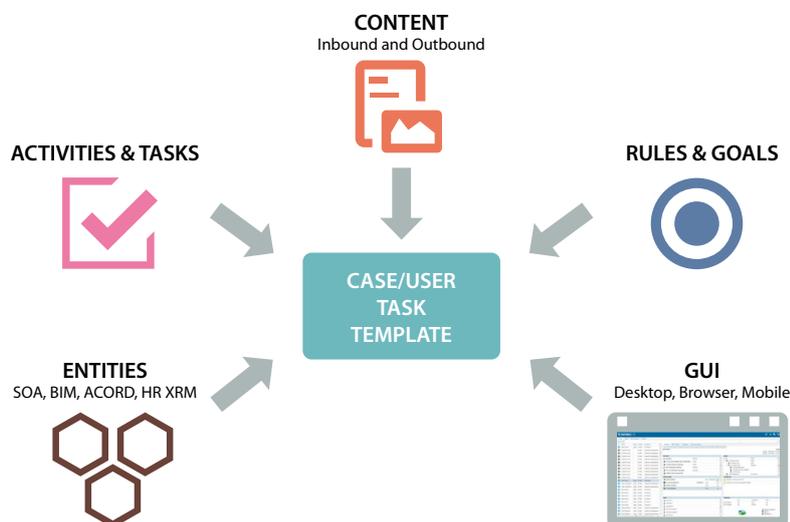
The platform provides an integrated framework solutions approach with a full range of business solutions - using straight-through to dynamic processes and completely unstructured processes - driven by rules and ad-hoc, context-based decisions optimized by compliance-checking techniques. All solution frameworks are currently available to Papyrus customers as part of the standard software purchase to facilitate rapid development and customization.



Papyrus Software Components

# Focus on What Matters Most

The Papyrus low-code, modular platform approach is utilized by customer-centric corporations as an enabling technology for enterprise-wide consolidation and seamless integration of enterprise content with business processes and customer communication. This allows for rapid development of the next generation of customer-oriented, process-driven business communication solutions with connected customer experience.



Papyrus integrates 5 essential elements needed for every business application.

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