



CUSTOMER

North America Financial Institution

INDUSTRY

Financial Sector

PROFILE

One of North America's premier financial institutions and a leading multinational services provider, this international bank and its affiliates offers products and services ranging from personal, commercial, investment, and corporate banking to millions of customers across the globe.

The company aims for a diversification of their corporate portfolio to fuel the long term growth of all their major business lines.

FINANCIAL SECTOR

NORTH AMERICAN FINANCIAL INSTITUTION

Business Environment

The financial institution's North American banking operations provide a full range of banking and investing services to more than 7.4 million customers across Canada.

International Banking encompasses the financial institutions retail and commercial banking operations in more than 40 countries outside North America. More than 70,000 employees, including those working in their subsidiaries and affiliates, provide a full range of financial services to more than five million customers.

The wholesale banking arm of the financial institution offers a wide variety of products to corporate, government and institutional investor clients. They are a full-service lender and investment dealer in North and Central America, and offers a wide range of products in the United States. They also provide select products and services to niche markets in Europe and Asia.

Business Challenge

The financial institution operates in a competitive and demanding industry. The capability of the bank to get to market quickly with accurate and informative documentation underpins future success. Generation of documents and capture of information is a key challengebusiness requirement.



Two business lines within the financial institution, Global Transaction Banking and the Private Client Group, had business needs to:

- Automate document generation and remove a reliance on manual tasks
- Improve accuracy
- Get to market quicker
- Raise productivity

International Banking Group

International Banking Group(IBG) provides a full range of transactional banking services to the financial institution's commercial and corporate banking clients. These services include business and investment accounts; electronic banking; facilities for sending and receiving high volume and/or high value payments; and trade finance.

Within the IBG, the proposal writing team supports sales managers through the development of customized client-facing materials such as request for proposal (RFP) responses, unsolicited proposals, PowerPoint presentations, and client service reviews.

"Intelldox helped our institution improve the services we provide to our customers through the automated generation of accurate and more timely produced documents with greater accuracy and the ability to perform automated calculations on the risk scoring."

Financial Group Systems Manager

Wealth Management Group

The Wealth Management Group (WMG) is focused on helping established clients build, preserve and transfer their wealth. They integrate existing services incorporate investment management, estate and trust and private banking into personal wealth creation solutions.

Both the WMG and PC groups constantly had to produce:

- Customized sales proposals
- Responses to RFPs

These were largely based on previous copies of proposals or bids and involved a lot of manual cutting and pasting of data, with commensurately high risk of error and cost for the bank.

For the private client group, they also dealt with the production of:

- Investor Profile Questionnaires (includes a scoring system)
- Account opening documentation
- Private banking loan collateral documentation

These were previously manual processes and if the client sought to operate more than one account, their personal information had to be manually filled and replicated on a range of paper-based forms.

Across both business lines, a range of common issues were encountered:

- Increased error risks within documents from manual cutting and pasting from previously used versions of content
- Long time frames to produce documents through manual manipulation
- Achieving consistency of company and legal information across documents
- Continual re-keying of existing information



“Intelldox has helped our teams to create more consistent and timely RFPs, which means more business for the bank.”
Financial Group Systems Manager

The Intelldox Solution

Both International Banking and the Wealth Management business units have implemented Intelldox to reduce the manual processes that exists within their business lines. No longer will staff be required to perform lengthy searches for content, cut and paste content from existing documentation or rely on memory to develop content. Intelldox provides a simple user interface application that prompts the user to provide, reuse or call on existing and approved content and generates a market ready document. Intelldox was thus able to transform a functional manual process into a fully automated system, increasing the organization’s overall business efficiencies.

International Banking Group

Within the International Banking group, the introduction of the Intelldox solution allowed the unit to manage and store up-to-date content centrally, delivering:

- Significant gains in generating new RFP’s rather than to repurpose existing bids
- Reduced completion times
- Elimination of rekeying of data
- Improved accuracy

Intelldox is used by four full-time proposal writers and is available to approximately one hundred sales managers across Canada.

Wealth Management Group

For the Wealth Management Group the product is deployed in all 19 of their centers across Canada. Each center has a combination of teams that work in Investment Management Services, trusts and/or private banking.

The group was able to dynamically:

- Generate Investor Profile Questionnaires including producing investor objective based scoring calculations - something that had to be manually done before
- Streamline the creation of account opening documentation
- Automated of private banking loan collateral
- Automation of these business processes have:
 - Improved accuracy
 - Reduced repetitive data entry
 - Reduced completion times

Business Benefits

The International Banking and the Wealth Management business unit teams have realized the following benefits were seen after implementing Intelledox:

- Process improvement, streamlining and changing existing work practices
- Centralization of corporate content gave better consistency when producing documents as well as time savings from not having to trawl through previous response documents to find appropriate document fragments
- Time savings through automation of risk scoring calculations
- Improved proposal and presentation turn-around time
- Eliminate any errors that may have previously resulted from dated content

Overall, The Intelledox solution was able to improve upon an already effective business process model and add an extra dimension to it. The automation of key business practices through the implementation of Intelledox allowed the bank's resources to be allocated into other activities which adds more value to the company's existing processes.

ABOUT INTELLEDOX

Intelledox is a 4th generation document creation system and specifically addresses what leading analysts refer to as "content chaos" caused by a lack of a structured and centralized approach to document generation. Intelledox creates significant business advantage through the automation of document-centric business processes. By leveraging existing investment in document management and information assets, Intelledox assists organizations to drive down operational costs, deliver increased efficiency, reduce compliance risk, and improve user experience. Intelledox has delivered high quality enterprise software solutions to a growing portfolio of large corporate and government customers across the globe. Currently some 300 customers and 400,000 users benefit from the solutions developed by Intelledox Pty Ltd. Headquartered in Australia, Intelledox has an international presence across the globe with offices in the North America, Singapore, and the United Kingdom.

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