Business Empowered Document Design and Maintenance Delivers Productivity and High Performance.

A leading Global 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.

With presence in more than 70 countries and over 180,000 employees, the Bank is a Eurozone leader and prominent internationally in Corporate & Institutional Banking as well as Retail Banking & Services. The Bank's customer communication, using 2,500 different document templates with approximately 20-25 new document templates each month, was planned to be significantly enhanced to double-batch production and increase online production by 20x to 400K documents daily.

The Challenge: With customers moving to digital, the Bank wanted to speed up production and time to market for new bank products through full digitalization and paper-free processes.

The business had been creating document specifications in Microsoft Word for the IT document developers - with both teams working in isolation and duplicating efforts. Heavy e-mail communication and handling thousands of templates in different languages through the standard file management system prevented linkage between templates and language variants and versions. To accelerate time to production, the communication development approach needed a complete makeover.

The Solution: Focusing on simplification and flexibility of document management processes, the Bank selected Papyrus Business Correspondence Solution to enable business users to directly participate in document development and reduce overhead. Leveraging the Papyrus integrated framework solution approach, the Bank could then fit the entire document design and development solution directly into the Papyrus Adaptive Case Management (ACM) framework to maximize flexibility and transparency in handling the document lifecycle.

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

Document design projects are managed through predefined steps and related data to enable, manage and align ad-hoc changes and case re-opening in reaction to changes in business requirements, while ensuring compliance-checking via ACM. All approved document design is released into the central correspondence library for use by authorized business users, who select from and create diverse elements while freely communicating through integrated commenting and chat. Finished document templates are verified in a document compare view before approval for release.

The BCMS common working environment maximizes productive collaboration between Business and IT and links different department working environments to facilitate cooperation and teamwork between all knowledge workers. Business teams work in different user roles, supported by multiple GUIs with full capabilities to flexibly design correspondence and complete the document development process. IT assists where required and addresses technical configurations for more sophisticated document elements, such as interfaces for business data input, complex business rules or dynamic tables.

Benefits achieved with BCMS demonstrate the shift to productivity, agility and visibility with an ACM approach:
- 95% created & maintained by the business, IT only delivers data
- 50% time reduction in the templates 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

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