

## Case Study:

# A Swiss Financial Giant Optimizes Document Creation and Management with EngageOne™ Compose

## Overview

This major Swiss financial institution is a cornerstone of its region's economy, with 1400 employees it is deeply involved with the local community and government. The company offers a wide range of banking products and services, including financial planning and advisory services for taxes, pensions, inheritance, as well as loans and leasing options, catering to both individuals and businesses.

## The Challenge

The company faced ongoing challenges in document creation and management. A key expectation from a recent core banking system change was that their document creation and management processes would be streamlined, reducing the time and effort involved. While the core banking system change did take place, not all issues were resolved, which has led to ongoing operational strain across the business.

As a result, the company's infrastructure also faced substantial challenges. The document generation system required frequent updates to accommodate fluctuating legal requirements. For example, the company must send year-end financial statements to customers, resulting in a peak period in January due to the high volume of documents that need to be generated within a short timeframe.

This leads to a considerable maintenance and resources strain on the infrastructure to handle these short-term surges effectively.

## The Solution

To address these challenges, the company chose to implement EngageOne™ Compose for their document generation needs. EngageOne™ Compose is a customer communications management platform that enables businesses to create, personalize, and deliver communications across various channels. This decision was driven by the need to standardize document processes across multiple lines of business. With EngageOne™ Compose the financial institution could leverage common templates for all types of documents, ensuring consistency and efficiency.

The product's capability to personalize documents according to the financial institution's specific requirements allowed for flexibility while maintaining a standardized framework.

## Industry

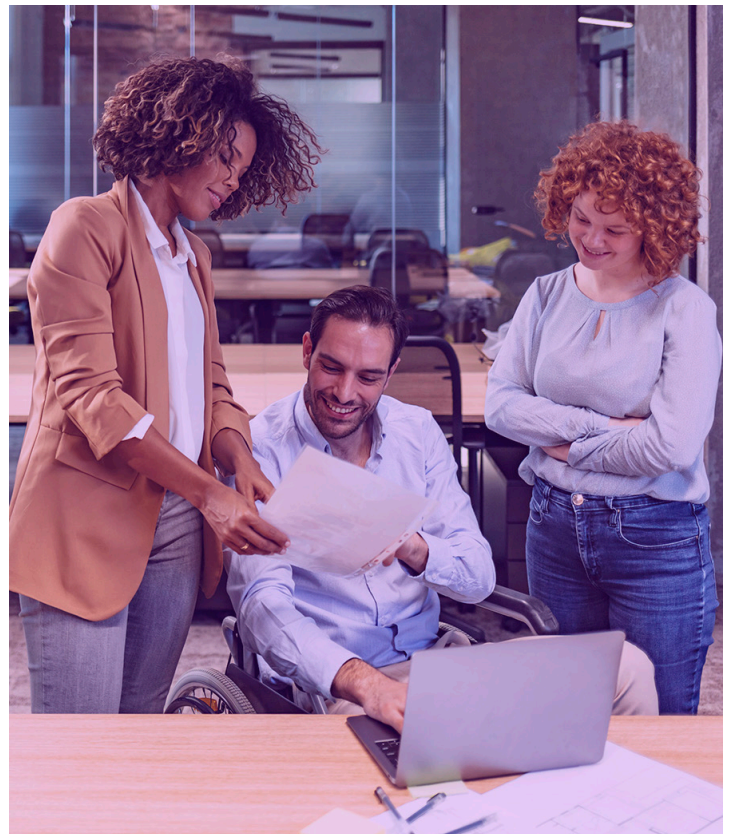
Financial Services

## Company Overview

- Headquartered in Basel, Switzerland
- 1400 employees

## Solution

EngageOne™ Compose



With EngageOne™ Compose, the company migrated their document generation to a Kubernetes platform. This transition was crucial for handling the dynamic resource needs of document generation. Kubernetes provides automatic resource scaling, which addresses the challenge of fluctuating document volumes and peak loads efficiently. Furthermore, their updates can be managed and rolled out without requiring on-site installations, thus reducing complexity and maintenance efforts.

## The Outcome

After integrating EngageOne™ Compose, the company experienced improvements in their document generation and infrastructure management.

The time required for document creation and management was reduced and resulted in an increase in efficiency.

The infrastructure's resource management now adapts dynamically to changing demands, while the overhead associated with maintenance and peak load management has been reduced. This Swiss financial institution realized cost savings and operational improvements, thanks to the scalable and automated nature of EngageOne™ Compose.

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