

Financial Services: Account Management Solution

Gain Control and Efficiency in Your Customer Onboarding and Account Opening Processes

Financial institutions are working to rebalance profit flows and grow core savings and retirement deposits. To do this effectively in the current market conditions will require significant improvements in the processes that onboard new customers, open new accounts and handle transfer of funds.

Improve Your Operational Efficiency to Outperform Competitors

Global 360 provides banks, credit unions and other financial services organizations a dependable foundation upon which to improve account operations. The Global 360 solution:

- » Enables consistent and accurate capture and processing of application forms, whether received on paper, online, through a branch, or telephone call-center
- » Enforces correct entry of customer information and compliance to information deadlines
- » Provides a complete view of a customer - their source documents, third-party information, accounts profile, and application status
- » Allows customer questions and requests to be satisfied immediately, independent of channel
- » Assures information access confidentiality based on customer attributes and user role and security privileges

Increase the Speed of Account Opening and Reduce Financial Risks

The Global 360 solution enables the definition and enforcement of an efficient and consistent account opening process. Workflow tasks integrated with related documents assure information accuracy throughout the process. From an operational standpoint, the solution ensures that business objectives are met by design, and that policy and regulatory compliance is reliably achieved. Users of the system, such as branch associates, external agents, back-office processors, account approval participants and supervisors all benefit from a system that presents the information they need to accomplish their work. By providing highly efficient document capture, reducing the complexity of the account application and assessments, and removing the need for time-consuming compliance training, the solution speeds cycle time and increases productivity.

What a customer actually experiences during the enrollment or account opening process is the moment of truth when it comes to customer experience. It is critical then how the bank captures customer information, collects and records any required customer documents and signatures, and accepts the deposit.

Forrester Research

The solution monitors overall flow and handles the complete lifecycle of a document, making it possible for Dexia Bank to check progress of dossiers and identify outstanding required tasks, such as missing authorizations, when creating or servicing accounts. With Global 360, Dexia has not only improved case management, it has also optimized the underlying operational processes.

Dexia Bank

Global360 

Change How Your Work Gets Done

Financial services institutions can do more than traditional and simple process automation – just focusing on the way work moves through an organization and making it go faster. Successful companies instead are focusing on the people, processes, documents, and collaboration throughout the organization – truly changing how the work gets done. Global 360 combines its market-leading business process and document management suite with the first out-of-the-box user applications – viewPoint™ – that address the unique needs of all people in a process. These applications gives each individual participant unique “views” of the information and capabilities they need to do their job – improving their experience as well as the interaction and collaboration between all of the participants in a process.

By changing the way work gets done, Global 360 BPM solutions cut deployment time by 50% and achieve 40% greater productivity - dramatically improving business performance while reducing operational costs. As a result, organizations can meet business performance goals, and exceed the service expectations of customers.

Accelerate Time to Value with Financial Services solutionViews

Benchmark studies show that leveraging industry solution frameworks can dramatically improve time-to-value for organizations.

Global 360's Financial Services solutionView frameworks bring together industry best practices and proven process improvement solutions to accelerate your company's productivity gains and operational results in critical business areas.

Built on Global 360 process and document management technology, each solutionView delivers out-of-the-box components pre-configured for your specific business process,

with the tools and best practices to quickly get everyone critical to your process initiative started, including:

- » viewPoint - our distinctive, out-of-the-box applications to dramatically improve productivity for every user-type
- » Baseline Process Maps
- » Business Rules, and
- » KPI Metric Dashboards and Reports

Take the first step towards greater productivity for a competitive performance advantage. Global 360 solutionViews, along with our QuickStart implementation services, enable you to build confidently upon our industry-specific process knowledge and experience base. We'll work with you to tailor a solutionView to your specific business needs and goals. The result is measurable productivity improvements with dramatically quicker time to value for your organization.

