

Process and Document Management for Banking

Leverage Global 360 BPM Solutions to increase your operational efficiency and retain customers

Financial services institutions are experiencing dramatic market and economic pressures. Faced with new business and technology challenges, and the growing complexity of the operational environment, every decision becomes a critical opportunity to improve productivity and better compete for customers. With successful implementations worldwide, Global 360 understands the unique needs of the financial services industry and how Business Process Management (BPM) can provide a sustainable advantage.

Increasing regulatory requirements, industry consolidation, concerns over security and privacy, the need to manage profitability and control expenses, and competitive pressures from traditional and new providers are driving financial services organizations to automate their complex business processes to increase operational efficiency, ensure customer loyalty, and deliver superior product quality.

To meet these challenges, your organization must efficiently manage and increase visibility into core systems and critical business processes.

To survive and thrive, banks must focus on improving key processes, including:

- » Merchant Services
- » Savings and Retirement Portfolio Management
- » Account Servicing
- » Loan origination and underwriting, and
- » Auditing

Global 360: Shifting from the 'way work moves' to 'how work gets done' to capture value for your institution.

Your goals are to increase customer servicing quality and to reduce operational costs. You already know that people are your organization's most important asset to meet those goals. That's why at Global 360, we believe your process needs to work for the people, not the other way around.

Most vendors build their solutions around a model-driven implementation, letting that model dictate how work gets done. This "standard" approach ultimately treats users as an afterthought. Improving process with speed alone can only help you make the same mistakes faster; and forcing an unfamiliar, non-intuitive user interface on staff can hurt productivity more than it helps. This, in a nutshell, is where Global 360 differs from most other BPM providers.

"Wells Fargo is totally committed to service; and Global 360 has allowed us to take our service from days to hours to minutes. This is a solution that enables us to fulfill our commitment to our customers."

*Tim Wallace,
Vice President of Loan Servicing,
Wells Fargo Educational Financial Services*

"By creating a central electronic archive containing all the relevant documents, we can access every document quickly on screen. It eliminates document loss and minimizes physical storage. And by giving electronically access to the right documents, it speeds up document processing. We are very happy with the Global 360 solution."

*Chris Bogaert,
Head of Systems,
Electronic Document Management,
Europabank*

360° Experience: Productivity Depends on Your Point of View.

Our role-based interface, called viewPoint, delivers a unique view of the information that is most valuable to each type of user, and helps them to do their jobs better. So your employees can be more productive in their jobs, improving work management. Improving the small business loan process, for example, when key documents are not available, forcing the processor to track down the information. All the while, there is a customer waiting for their loan to go through.

Your managers and executives can gain transparency into the business, enabling them to make smarter and more profitable decisions. For example, set your Merchant Services key performance indicators as part of the process. As thresholds are exceeded (e.g., service levels not being met), work can be dynamically re-allocated until service levels are brought back into balance. By automatically reallocating the resources to respond to changing business conditions, the system delivers better control, lower operational costs, and efficiency for processes that span roles, responsibilities, organizational boundaries and systems.

And, your designers can automate the process more effectively, resulting in improved process management. User application development accounts for over 40% of deployment costs. We think that there's a smarter way to spend nearly half your deployment dollars. Our solution provides drag-and-drop process building, application design tools, and pre-built activities, so systems can be quickly implemented, and easily maintained and improved.

Global 360: The most complete view of all assets and all participants who are vital to success.

We believe the process should provide the capability for users to work together, aggregating the information that users need, and structuring the flow of work between users and organizations. Some vendors allow you to add documents as attachments, but we go much further by making all documents an integral part of the process. For example, if processing an automotive loan for a car sold in Ohio, the user would see a task list specific to Ohio state regulations. Further, we establish audit trails and can assign tasks associated with a document, for example, verifying that proper signatures are in place with an ISA or IRA rollover in your Savings and Retirement Portfolio Management processes. From receipts and e-mails to voicemail messages, every document is treated as a full participant in your process. And, we give you the ability to digitize, edit, certify, and manage those documents – which makes attachments seem almost archaic.

Bottom-line, every user gets the single view of the specific information they need to get their work done. And, that translates to better business results for the institution.

Leading Financial Services Institutions Use Global 360 BPM Solutions

- » ABN AMRO
- » Bank of America
- » Capital One Bank
- » Citicorp
- » Dexia
- » Europabank
- » First Alliance Trust, Netherlands
- » JPMorgan Chase
- » UBS/Paine Weber
- » Wells Fargo

Global 360 helps organizations to better manage processes today and make improvements for tomorrow. Our leading process and document management solutions let you get more work done -- faster. Building on our strength in financial services, government and insurance, Global 360 empowers sites for more than 2,000 customers in 134 countries. Global 360, Inc. is headquartered in Texas with operations in North America, Europe, and the Pacific Rim.



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