


CASE STUDY

Basler Kantonalbank

“WE WERE LOOKING FOR ONE SOLUTION THAT WOULD ALLOW US TO MANAGE ALL TASKS AT THE PUSH OF A BUTTON.”

Beat Egloff, Product Manager of IT, Basler Kantonalbank



PITNEY BOWES BUSINESS INSIGHT SOLUTION PROVIDES BASLER KANTONALBANK CLIENTS WITH COMPLETE STATEMENTS OF ASSETS AND LIABILITIES.

Challenge

Basler Kantonalbank sought a solution that could display all customer-relevant data in a fast, easy to handle manner that could successfully be integrated into their current IT infrastructure.

Solution

Utilizing Pitney Bowes Business Insight's DOC1® Suite, Basler Kantonalbank was able to make detailed and complete statements of assets and liabilities available to their customers in a timely, cost effective manner.

SUMMARY

The Company

The Basler Kantonalbank (BKB), bank of the Swiss canton Basel City, was looking for an output management solution that would enable them to provide their subsidiary company Bank Coop with one overview of all assets. The solution had to feature fast data processing, easy handling, and trouble-free integration. As the bank of the canton, the BKB is obliged by law to contribute to the performance of the economic and social duties of the canton. Among others, the organization's tasks include satisfaction of the monetary and loan needs of the individual inhabitants and local industry, and to offer opportunities for secure and interestbearing financial investments. The Bank Coop is a retail bank operating throughout Switzerland, with 32 branches and around 700 employees. They offer all essential banking services for private individuals and SMBs. Their goal is sustained economic growth, while their policy and actions are sensitive to social ethical and ecological principles. In the area of information technology, the BKB and the Bank Coop work together in a joint organization called Competence Center IT.

Background

In the past, they generated single statements of securities that contained information on bonds and loans, shares, options, shares in a fund, derivatives, and more, in the different dealing currencies for their internal and external clients/customers. “The single statements of securities were unable to present a complete financial overview, and were therefore not very customer-friendly,” said Beat Egloff, Product Manager of IT with BKB. “Moreover, the statement of securities

information content, size, and display were frequently points of criticism, and they did not meet the standard that is now required in the area of affluent banking,” explained Egloff. “That is why Bank Coop decided to deploy an appropriate software solution that would replace the different statements of assets and liabilities with a single statement of assets and liabilities for every customer,” added Egloff.

The new solution had to be able to display all customer-relevant data with regard to accounts, depots, loans, mortgages, assets, and more, to indicate securities portfolios according to dealing currencies, and to display asset allocation and graphic statements of assets and liabilities. Additionally, the solution had to allow for the integration of the layout according to the corporate identity, access to the statements of assets and liabilities online, and the simultaneous dispatch of numerous documents when required. “We were looking for one solution that would allow us to manage all tasks at the push of a button,” said Egloff. “Furthermore, fast data processing, easy handling, and trouble-free integration into our existing IT infrastructure to boost the project's success from the start were important criteria for us,” explained Egloff.

RESULT

After extensive research and comparison with other suppliers, the bank decided to deploy the DOC1® Suite from the Munich-based branch of Pitney Bowes Business Insight, the only company offering an all-in-one solution for Customer Communication Management (CCM).

"NOW, STATEMENTS CAN BE PROCESSED ONLINE ACCORDING TO CUSTOMER REQUIREMENTS AT ANY TIME AND RETROACTIVELY AT THE WORKPLACE OF THE ACCOUNT EXECUTIVE, WHICH IS OBVIOUSLY HIGHLY ADVANTAGEOUS."

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"The functional aspects, the intuitive handling, and the user-friendliness of the solution were the factors which convinced us in particular," explained Egloff. "Also, the solution precisely met the requirements defined by us in our catalog of criteria."

The DOC1 Suite is a software package enabling the generation of personalized and demand-oriented documents on different platforms that can then be made available to customers either in paper format or electronically. The DOC1 Suite consists of different components, of which the DOC1 Data Flow™ and the DOC1 Designer™/Generate™/Print™ are being deployed by the Bank Coop.

"DOC1 Designer helps us to create the layout of every statement of assets and liabilities using drag and drop," explained Egloff. "The design component allows for a definition of the data structure, the generation and administration of graphics, images and address fields as well as the definition of logics or conditions as a set framework of regulations for the generation of personalized documents," continued Egloff. "The DOC1 Generate production platform combines the respective logics and conditions of the body of rules and regulations with the transaction data to be processed. The print data stream is generated as a postscript or AFP file. Finally, DOC1 Print creates the requested presentation format, which can be delivered to the customer in paper format, by fax, or electronically by email as a PDF file," added Egloff.

"The DOC1 Suite proved its worth from the start," said Egloff. "The implementation went well, and no problems occurred. We installed the DOC1 Suite on a separate server and integrated it into existing systems for the data transfer," explained Egloff. Within less than four months, the implementation was completed. After an intensive test stage, the solution was ready for operation in December 2005, in time to provide the first statements of assets and liabilities (approximately 500,000 pages) at the turn of the

year. "December 31 is an important date for us, because we have to generate the statements of assets and liabilities within ten days after the end of the year," explained Egloff. "If we do not manage to do that, we cannot close the financial year. But with the DOC1 Suite, we will have no problems doing so in the future."

"We are very happy with the solution. It helped us meet all requirements regarding the statements of assets and liabilities without having had to adapt the requirements in line with the solution's limitations," explained Egloff. "Thanks to the solution, Bank Coop is now able to make detailed and complete statements of assets and liabilities available to their customers rather than the former statements of securities. With DOC1, processing of the statements of assets and liabilities is not only periodically possible. Now, statements can be processed online according to customer requirements at any time and retroactively at the workplace of the account executive, which is obviously highly advantageous," added Egloff.

"As far as the solution's economical utility with regard to its deployment at the Bank Coop is concerned, deployment of the DOC1 Suite has proved to be very advantageous in the areas of quality and service improvement," said Egloff. "The solution predominantly supports the production of statements of assets and liabilities for our securities customers. But the DOC1 suite has already turned out to be a solution which enables us to realize complex customer outputs," added Egloff.

The good collaboration with the technical consultants of Pitney Bowes Business Insight, meant that the project could be realized successfully and on time. "We cannot give an exact prognosis regarding the degree to which the solution will influence the future business of the Bank Coop. But the project demonstrated to us that the DOC1 Suite can realize complex requirements for documents. Future projects will certainly benefit from this," concluded Egloff.

