



Phoenix Case Study

LandesbauSparkasse

LBS achieves consistency across multiple sites throughout Germany with a product based business processing solution. Flexibility and configurability allow managers to set up processes and procedures for all locations.

Requirements

A product based Image & Workflow solution

A single processing system to be rolled out across multiple locations

A flexible, configurable system that can: improve customer service & productivity; allow processing consistency; boost productivity; support different business environments and site requirements.

The Phoenix Solution

The e² m² product set provides the customer service departments with a work processing system across multiple locations. All work is now quickly routed and referred to the appropriate users providing improved service and increased productivity. m² and e² integrates to existing legacy systems and line of business applications.

Number of Users - 300

Platform - HP Unix

Integration to other applications: Siebel, IBM, Tandem, Microsoft Word, OCR, E-mail and Fax

Managers within Financial Services organisations strive to boost team and departmental productivity and improve customer service. By using workflow to streamline business processes - from scanning incoming post, fax and email right through to automating key business processes such gains can be achieved.



LBS, one of Germany's largest building societies, opted to implement such a strategy. LBS's largest sites, Berlin-Hannover, Kiel and Saarbrücken were the first in the Group to implement the m² e² product set, an "out-of-the box" content management and workflow solution from Phoenix Technology Group. Phoenix worked with CENIT, a leading German systems integrator, to implement the solution in all three sites.

The Solution

The functionality within m² has enabled LBS to manage all inbound and outbound documentation electronically. e² in turn, has provided a set of applications that allow managers in different departments to design workflow processes, manage team/user access and security and balance workloads in accordance with the various demands of each of the different departments. The m² and e² product set works together with FileNet Panagon software.



"LBS went for a well developed standard solution in Phoenix m² e² product set because a proven technology would mean relatively low risk for us.

Going with the Phoenix solution meant we will reap the benefits of continuous product enhancements via the User Group meetings and from technical advancements due to market pressures "

Dieter Heymann,
Managing Board Member of LBS
Schleswig-Holstein.

Drawing upon extensive experience in both design and implementation across Europe, Phoenix and CENIT have delivered a comprehensive solution for LBS.

The Benefits

e² has enabled managers within LBS to design efficient workflow processes, defining mail distribution rules, business processes and their functions.

The processes route work to the correct user. Via a single desktop e² allows users to efficiently complete transactions and customer queries, with quick and easy access to all relevant customer information.

The system also supports functions such as resource management, workload balancing, re-submission of work-items, process distribution in exceptional cases, and quality/service levels.

m² facilitates receipt and processing of

documents in many different formats (paper, email, fax and telephone).

All inbound and outbound interaction or communication with each customer is automatically saved to the correct electronic customer file.

An audit history automatically logs each event with each customer, detailing when, why, and by whom it was completed.

All users, customer service agents and call centre staff have a single view of each customer's details. All relevant documentation is available at the click of a mouse.

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This has far-reaching implications for the Group's future plans. A Call Centre application in LBS Schleswig-Holstein will be linked directly to the Phoenix system. The information contained within the m² central repository, such as process histories and customer files, are integrated to the Call Centre interface. Call Centre staff have instant access to current information and are fully equipped to answer customer enquiries via the telephone or any other medium.



Call Centre staff have instant access to current information and can answer customer enquiries via the telephone or any other medium efficiently and intelligently.

Standard interfaces and components in e² and m² integrate to LBS's existing systems and line of business applications.

The solution is available in two flavours; a traditional client server application or a browser based thin-client version for deployment over an intranet or the internet

Overall the solution from Phoenix has allowed LBS to dramatically reduce processing times, enhance access to information and substantially improve customer service.

Formed in 1997, Phoenix Technology Group successfully delivers content, workflow and case management solutions to financial services sector on a fixed cost and fixed timescale basis. Our customers include bluechip names such as AXA, Royal & SunAlliance, Winterthur Life, Lloyds TSB and many more.

The m² e² product set is unique in that it was specifically developed for the financial services sector. Phoenix was awarded FileNet Partner of the Year in 1999 and 2000, Also in 2000, FileNet recognised m² and e² solution as the 'best solution of its type' for banking and finance. Phoenix was once again received the Golden Partner Award in 2003. FileNET, Phoenix and CENIT jointly operate sales and marketing activities right across Germany. If you would like to discuss implementing any of the above technologies please contact us.

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About Phoenix Technology Group



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