



## CASE STUDY

Bank  
J.VanBreda&C°

“By putting the client right at the heart of our new infrastructure, we can offer products that are tailored to the requirements of the client.”

**Marc Wijnants**  
Head of IT

### Executive Summary

Banks have been digitalizing their processes in recent years, but back office activities are often only partly automated, leaving input and output processes document-intensive.

With its goal of becoming paperless in three to four years, this bank recently completed phase one of an extensive project in collaboration with Document Dialog, a Pitney Bowes Business Insight partner.

### Business Challenge

Achieving a paperless environment, including forms to be filled out and signed by clients, meant that Bank J. Van Breda had to rethink its existing mainframe environment, which was developed 20 years ago and centered around the bank's products—not customers. “If you want to give a client reliable, independent advice about growing their assets, you have to offer a holistic view,” explained Marc Wijnants, Head of IT.

After an analysis of the bank's requirements, Document Dialog recommended enhancement of its document creation environment (featuring DOC1) with an e-messaging solution to enable document processes and digitalize and streamline client communications.

### Customer profile

- 80-year Belgian bank primarily serves professionals and family-run businesses
- Focus on retail, small/medium businesses and doctors

## Solution

Because Bank J. Van Breda's clients typically do not have time to visit the bank, the bank's relations managers visit their client instead. Their new operational application with DOC1® and e-Messaging Solution software supports this process as well.

"These solutions seemed to integrate well with our digital archive and other company applications and finally, managing the system looked simple too," said Wijnants.

Now relations managers use touch screen tablet PCs with wireless connections to the bank servers for constant access to client and market information. Clients can view account information and sign documents via digital pen or electronic identity card. Agreements can also be sent via email for confirmation.

"In part thanks to the knowledge, experience and technological contribution of Document Dialog, we can present this advice to the client in a clear way—no matter which channel we use to deliver the information," said Wijnants.

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“This truly brings an end to having to hand over and work through piles of paperwork with clients.”

**Marc Wijnants**  
Head of IT

### Results and Benefits

Both relationship managers and customers easily access and approve account information online for paperless efficiency

10% greater operational efficiency allows account managers to focus on more appointments and consultations to generate additional business and profits

Streamlining input processes can help reduce the headcount by the equivalent of 10 full-time staffers

### Technology used

- DOC1® document creation
- e-Messaging Solution
- Document logistics and client communication consulting services with Document Dialog, a Pitney Bowes Business Insight partner

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