

"We now have a centralised, standardised, hierarchised and secured document repository"

# Banque Française: the quality of documents goes through Bdoc



Centralisation and securisation: these were the Banque Française's DTP goals. Accompanied by Business Document, not only did the banking establishment meet its goals, it surpassed them.



Maryvonne GUÉRIN  
Director of organisation  
at the Banque Française

## The Banque Française at a glance

The Banque Française, an independent general-service establishment, offers all types of banking and financial services, as well as flow-management services to mutual-insurance agencies, and consumer loans and other savings bank books in the setting of collective agreements reached with the mutual insurance companies.

Staff: 45 collaborators

## Key numbers

- 25,000 customers, of whom 9,500 files on loans to mutual-insurance adherents.
- 85 document models

## Advantages

- Document centralisation, normalisation and securisation.
- Integration with the Evolan Pack professional software package.
- Upgradeability of the solution.

"At the time, we had no document repository, and we had to suffer the consequences each day?", explains Maryvonne Guérin, Director of Organisation at the Banque Française. "The coexistence of several versions of the same documents, the lack of normalisation and securisation, and always on the edge of headaches? DTP management was in sore need of a small revolution. Even more so, as management of our printed stocks was impossible. For example, we would print a hundred copies per run of our account agreements; these were then sent to the branch offices, with no idea of their use or their location. Considering how fast our documents become obsolete, the risk of a mistake in versions was very great, besides it being costly."

## "Starting small", with great opportunities for evolution

It was in this background, in 2002, that the Banque Française started considering the creation of a document repository, along with drawing up procedures. "We seized the opportunity to take stock and review all documents. We worked with the legal department on the contents, and we have committed to the standardisation of documents which previously had complied with no definite graphic charter." At the same time, Maryvonne Guérin contacted Business Document, whose proposal she found most interesting. "What attracted me was the chance to 'start small', with great opportunities to evolve later on. What is more, with the design being made in Bdoc Suite using MS Word, it would be easy to recover our existing documents. Finally, I was immediately dealing with very competent people, who offered us a convincing demonstration."

## Interface with the professional software

The project took off in April 2003. Business Document teams installed Bdoc Suite on a common server for the entire bank, developed a tool to recover documents by area as well as an interface using the Evolan Pack banking software (under AS/400 Editor's Note) used in day-to-day operations by Banque Française collaborators.

*"This interface permits an automatic recovery of the data found in our professional software, to be merged with the document models managed through Bdoc Suite."*

Furthermore, lacking sufficient internal resources, the Banque Française called on a Business Document consultant for the design and development of document models. *"To this day, we are enjoying the benefit of very high-quality coaching from this consultant, who works with a project head in our offices on document specifications and reception."*

## Automation of editions

Concretely, users launch the program developed by Business Document and choose the document they wish to edit from a list (Bdoc Suite manages 85 document models), classified by area. Then, they need only enter customer or account number and the data are recovered directly in the professional application for mass-mailing. It goes even further: depending on the customer's typology (corporate entity, single entrepreneur, private individual), the document automatically formats itself differently.

And, after verification, a simple click launches the printing. *"Document printing goes through a dedicated printer, with automatic management of the type of paper to use and of front/back printing, if need be. And as everything happens in real time, we no longer have to manage inventories."*

Naturally, complete data capture is also possible, when opening a new account for example. Besides and depending on the type of document, every user can also perform complementary captures if need be. Finally, the interface permits saving and storing the document on the user's initiative. *"Overall, the elimination of manual capture has resulted in considerable time savings, while reducing the number of mistakes. And productivity has obviously increased."*

## Reduction of operational and legal risks

*"We now have the benefit of a centralised, normalised, hierarchised and secured document repository."* Every document is referenced and coupled to procedures, and version management is fine-tuned. An exact graphic charter has been set up, allowing the insertion of the logo for black and white prints, when required (for colour printing, letterhead paper is still favoured).

Furthermore, Bdoc Suite allows protecting documents by locking all modifications except in the variable sections, resulting in a net reduction in operational and legal risks. *"The end result is that we now offer our customers clean and legible documents, and we are pleased with the improvement achieved in our image."*

The Banque Française has no intention of staying put, and still has many projects on the drawing board. *"The next stage will be automating processes management: we are looking at ways to eliminate the currently manual phase of capturing the customer's number by generating an XML flow directly from our Evolan Pack professional application."* Another project will equip the bank with the Bdoc Online web module, to build up a complete client file that would include hard-copy documents, Bdoc documents, and the data contained in the AS/400 environment.

*"The objective, to make client files accessible to all, is part of the activity-continuity plan. All in all, Bdoc Suite's upgradeability opens a lot of doors to us, and we intend to take the fullest advantage."*

*"We now offer our customers clean and legible documents, we are pleased with the improvement achieved in our image"*

