

"Thanks to Bdoc Suite, our customer satisfaction is growing"

Carden Banque Populaire: a revolution in desktop publishing



After starting in 2002 to research options for renovating its desktop publishing system, Casden finally decided on Bdoc Suite. The key factors in the decision: document homogenization, improved corporate image, better responsiveness and reduced costs.



Sonia DEMONGIVERT

Manager of channels in the department of information systems

A short profile of Casden Banque Populaire

Born from through the efforts of teachers, and created and managed by them, Casden Banque Populaire is the cooperative bank for staff of the Ministry of National Education, Research, and Culture. As a national bank, it established a partnership with the Banque Populaire group to provide its members with better services.

Work force: 499 employees,
207 departmental representatives

Key numbers

- 1,404,560 members, including 881,268 who are customers of Banque Populaire
- 5 billion Euros in member deposits
- 100 document templates

Benefits

- Homogenization of documents, better customer image
- Integration with Evolan New Business business software
- Complementary tool to the CRM tool
- Functional richness of solution

Mutualism and solidarity: these are the central values of Casden Banque Populaire, a cooperative bank for staff of the Ministry of National Education, Research, and Culture. "Solidarity is an important value to Casden, says Magali Vellutini, head of desktop publishing project management. By opening a savings account, members effectively provide credit for other members, while at the same time accumulating points allowing them to improve their own interest rates."

In 2002, Casden Banque Populaire began reflecting on its external communications and desktop publishing. Multiple stakes were involved. "We needed to optimize the updating and creation of documents, user practices and the efficiency of operational units... while at the same time reducing our publishing costs. Our priority was to improve the documents addressed to our members, so as to improve Casden's identity and image for the long term", explains Sonia Demongivert, manager of Channels in the Department of Information Systems. Other goals were to have better knowledge about the membership by historicizing both commercial and instructional documents; and to reduce processing response times. "Up to that point, our desktop publishing solution consisted of a multiplicity of disparate tools; we had several coexisting databases and had no unified graphic standard."

The acquisition of a new credit processing software package (Evolan New Business from the Sopra Group) proved to be the perfect opportunity to acquire a high-performance desktop publishing tool. "After preparing an extremely precise technical specification, we held a Request for Proposals. Business Document's proposal caught our attention, explains Sonia Demongivert. The solution allowed us, as was our desire, to transfer template design to the business, to have interactive documents, to retrieve documents from Web workstations, to manage paperless documents and, last but not least, it integrated into both a Web interface and Java J2EE, our application technical architecture."

Tests carried out by Business Document teams on mass printings convinced the Casden teams: the project could start.

60% of publishing is done in real time

After defining the graphic standard, an interface was developed for the ENB software, which calls Bdoc Suite for DTP management. Starting in 2002, the solution went into production on a pilot site, the extranet of the consumer credit processing partner. *“At this stage, the project concerned publishing of offers and realtime simulations performed on the bank’s network and on our partners’ sites. The solution was then generalized (in 2003) to all real-time offer publishing, and to consumer- and real estate-credit simulation and processing correspondence.”* Finally, in 2005, a first back-office batch on the “Boss” application was put into production for managing special cases, such as inheritance or member resignation. *“At every stage of the project, and to this day, the Business Document teams listened, were available and showed understanding.”* Resulting in a better image and faster response times, the Bdoc Edit solution was a veritable revolution at several levels for Casden in the management of its desktop publishing. First of all, the documents are harmonized. *“Whether they go to one of our 3,000 points of sale in France or on our Web site, our members always obtain the same document, always created in the same way and complying with a single graphic standard”,* explains Sonia Demongivert. Furthermore, each document can be customized for a particular partner and point of sale in a manner that is transparent to field employees, who only enter the data concerning the prospect, the client data being imported from the business software. This ease of use for daily tasks has meant that all network employees have been able to quickly learn the tool, without training.



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Cost reduction

The arrival of Bdoc Suite has also made possible a major reduction in costs and a simplification of processes. *“Now, we only use white paper where previously pre-printed forms were necessary, explains Sonia Demongivert. Everything is contained in document templates.”*

And last, but not least, the updating and maintenance of document templates has been facilitated, which has shortened response times. *“Frequent regulatory changes are now integrated into the document templates within one week, at most, for the entire network”,* states Magali Vellutini. This speed and simplicity of change are also highly appreciated by the marketing teams. *“Thanks to Bdoc Suite, we have shortened our processing times, and we are seeing greater customer satisfaction and high productivity within all the operational units.”*

As a follow-on to the success of these initial projects, in 2006 Casden began studies on implementing a single, standard DTP interface that would integrate with business applications. *“The first batch is linked to CRM thanks to an interface with our Coheris application: the objective is to have a standard interface to generate correspondence in response to claims and or requests for information.”* Another project: integration of Bdoc Suite version 2.7, for which Casden will be the pilot customer. *“The Business Document solution offers great possibilities and we want to fully take advantage of this richness. For example, we have started studying the future possibility of managing our product sheets in Bdoc Suite. In short, our partnership with Business Document will be lasting quite a while, which is something we are happy about.”*