



SpareBank 1 SR-Bank

Customer Success Case Study



SR-Bank Turns a Challenge into an Opportunity to Innovate

Part of the SpareBank 1 Alliance, SpareBank 1 SR-Bank is Norway's largest regional bank and the second largest Norwegian-owned bank. They offer a full range of financial services within areas such as loans, savings, advice, insurance, and pensions for personal and corporate customers.

Challenge

A couple years ago, SR-Bank started an intensive evaluation of suitable document generation solutions that would enable them to generate large, template-based agreements for both corporate and retail banking customers. The organization was using Microsoft Dynamics CRM; they required all document creation and output management tasks to be performed from the Microsoft platform.

The corporate division, the primary user of the document system, was satisfied with the functionality of the chosen solution but the business support division, which was in charge of the continuous development and technical support, found it to be somewhat cumbersome and labor-intensive, especially when an internal user required a change to an existing template or document flow. It was decided that the system would be replaced.

Product

- Experlogix Document Automation

Benefits

- Streamlined document processes
- Reduced dependence on IT resources
- Improved document consistency

Tech

- Microsoft Dynamics 365

As a high priority, SR-Bank and their appointed technical CRM advisors from Microsoft and Avanade – a global joint venture enterprise between Microsoft and Accenture – began their search for a reputable software vendor with an easy-to-use document generation add-in for Microsoft Dynamics CRM. All parties involved agreed that Experlogix Document Automation was the best solution to help SR-Bank empower their business users and reduce IT dependence.

Solution

User-Friendly Features to Optimize Processes

Experlogix Document Automation provided SR-Bank with a complete, end-to-end solution streamlining and automating document generation processes – creation, management, approval, delivery and storage – directly from the Microsoft Dynamics CRM environment.

Dynamic template design leveraging advanced capabilities for data integration, personalization, and configurable business rules can be easily done using the Experlogix Document Automation Template Builder add-in for Microsoft Word. The solution's intuitive user interface allows for easy access and use of powerful functionalities and customizable options for building and deploying document flows that support any internal business processes. These logic-based customizations can be made by SR-Bank business process owners, alleviating the pressure on the IT business support team.

Through the Experlogix Document Automation for Dynamics implementation, SR-Bank optimized their document generation processes while remaining compliant with internal best practices. Highly personalized, relevant customer-facing agreements are created, generated and delivered in just a few clicks from Microsoft Dynamics CRM. E-signatures can quickly be captured from customers through a pre-built integration with DocuSign; then final agreement documents are automatically stored in the required secure Microsoft SharePoint location for efficient management.



Result

The rationalization of ABC Financial's template library generated immediate benefits by reducing maintenance and improving consistency. The risk of using a non-compliant template – and having to start over after a transaction was in process – was also eliminated.

The Experlogix Document Automation solution integrated with Microsoft Dynamics CRM provided ABC Financial salespeople with powerful capabilities for data integration; personalized contracts can be generated in seconds with accurate customer data pulled from ABC Financial's CRM system. The end-to-end automated workflows boosted productivity, freeing the sales team to concentrate on growing the business instead of struggling with a cumbersome and manual contract process.

The excellence in service – quality, timing and delivery of requirements – received from the Experlogix team was particularly noteworthy to ABC Financial. Knowing they had a vendor-partner with a similar philosophy of customer service gave them the confidence to consider further applications across the organization.



“It is an easy, intuitive document generation tool that quickly does the job each time for each customer, at the click of a button.”

Silje Eriksen

Bølla Leader of System Management

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