Delivering Improved Access and Intelligence to Documents

By using Adlib, a leading investment management and investment services company automated the process of converting customer statements from the DMS, resulting in increased workgroup productivity across business units.

Challenge

A leading investment management and investment services company needed to make thousands of customer statements and documents per day accessible, searchable and retrievable from a Document Management System. Documents were generated from a mainframe and then printed on paper and stored, which was a time-consuming and inefficient process.

They were faced with a number of arduous challenges. This organization needed to:

The Result

This organization needed interoperability across systems. Adlib’s content intelligence platform automated the process of converting customer statements and other documents from the DMS swiftly and seamlessly. Workgroup productivity rose as key information became more accessible and shared across business units.

By using Adlib, this banking organization was able to achieve a number of benefits:

- Automation of the rendering process and improved accuracy of conversions
- Reduction in costs with a paperless solution
- Increase of accessibility and enabled searchability of documents
- Integration configured with their current DMS system

Adlib’s Content Intelligence platform enabled this banking organization to effectively manage thousands of customer statements per day, improving the customer experience.