

# Consumer & Business Financial Services Provider

## Benefits



Reduced operating costs and cycle times.



Greater customer retention.



Optimized processes across the enterprise.

## Business Challenge

A Fortune 500 Financial Services company embarked on a multi-year initiative to replace its current [enterprise content management \(ECM\)](#) technology that surpassed its end-of-life term in their insurance division. The client had goals to:

1. Improve enterprise scalability.
2. Reduce operating expenses.
3. Remain competitive in the market.

To achieve these goals, the client needed to leverage an advanced ECM solution that continually re-engineered their existing business processes without missing any opportunities that a previously-purchased ECM stack could not address.

## Solution

After understanding the client's needs, objectives and goals, we leveraged IBM Datacap, IBM Case Manager, and [Pyramid eXpeditor \(PX\)](#) to automate processes for **1,500+ users**, not including their customers and agents. Leveraging PX accelerators and templates, the client quickly developed and integrated the solution into their existing processes.

With the IBM ECM platform, our client now has a broad range of out-of-the-box, configurable add-on products. This allows for the client to continually improve their process according to market demands.