

SUCCESS STORY

Commercial bank enhances customer communications while adhering to strict compliance regulations.



INDUSTRY
Financial Services

COMPANY
Commercial Bank
Jordan

Established in 1973, the company provides commercial banking services in Jordan and surrounding countries. With a capital base reaching USD 1.8 billion by 2022, they have played a pioneering role in Middle Eastern banking landscape, introducing initiatives such as saving account prizes, children's branches, and mobile banking services.

OL® Connect enables multi-channel communications with little to no change to existing IT infrastructure.

Challenges

The bank's outdated Customer Communication Management (CCM) product hindered the ability to simplify and modernize document processes. The company wanted to enhance customer satisfaction and increase operational efficiency, which meant they needed a more cost-effective and user-friendly replacement to meet their growing needs in both document design and omni-channel delivery.

- Continuous document design change requests to meet business needs were outsourced to a vendor due to software limitations
- A high number of complex templates and document workflows resulted in sub-par performance
- The critical data preparation tool, a separate module, was end-of-life

Solution

OL Connect replaces the organization's dated CCM product to enrich document design, advance operations, and support compliance.

- Enables seamless setup of server settings, certificates, user credentials, and database connections
- Facilitates data extraction and the creation and modification of document templates
- Optimizes print processes and configurations for printer, tray selection, and finishing
- Streamlines document workflows to ensure security, accuracy, and compliance
- Automates the delivery of multi-channel communications including print, email, and FTP

Results

- Eliminated outsourcing and cut costs by taking their solution in-house to produce and modify documents
- Increased efficiency and accuracy by automating processes and digital archiving
- Improved the customer experience by delivering highly personalized and multi-channel communications based on their preferences
- Complied with industry standards and security regulations

Document types

- Statements
- On-demand contracts

upland
Objectif Lune

For more information visit: uplandsoftware.com/objectiflune/

Upland Objectif Lune helps companies automate their business communications with our digital transformation solutions. We create, manage, distribute and automate transactional and promotional documents while solving the challenge of integrating systems.

