



OL[®] Connect

Financial Services



Upland Objectif Lune

Document composition and automation software

Upland Objectif Lune helps organizations optimize transactional and promotional documents by automating manual processes to enable digital transformation without changes to existing systems or additional infrastructure investments.

Objectif Lune's OL Connect technology helps users create, manage, distribute, and automate transactional and promotional documents while solving the challenge of integrating systems.

Banking and financial institutions

Technology is transforming every aspect of banking and financial services including communications.

Customers expect banks to provide an experience that is personal, convenient, and meaningful. They want to receive tailored information through various delivery options, including email, SMS, web, or traditional printed letters.

Many financial firms still rely on manual processes to distribute communications, which limits staff productivity and increases the risk of error. This hinders the ability for businesses to comply with privacy and data management regulations and industry mandates.

Financial institutions must invest in solutions to thrive in the current competitive market. These include digital tools that simplify internal systems while maximizing team productivity. Equipped with the right technology, employees can easily and quickly manage large volumes of data to create personalized documents and deliver communications through a variety of ways.



Unlock digital opportunities in banking and financial services



OL Connect provides the financial industry with a flexible and optimized solution to keep businesses running smoothly and effectively while enhancing the customer experience by delivering personalized and interactive communications via preferred channels.

OL Connect automates manual tasks to simplify document workflows, ensure accuracy, and lower administration overhead. Capitalize on the efficiency and cost savings empowered by process automation and digital transformation.

OL Connect allows financial firms to distribute personalized statements, letters, promotions, reminders, and more. Our technology utilizes customer data from any source or system to automatically deliver accurate information to the right customer at the right time.

*Source: McKinsey & Company study 2020

Business drivers

Technology is becoming a key competitive differentiator between banks and financial institutions

Client expectations for electronic communications, flexibility, and control are increasing

Banks need to keep a close watch on the effectiveness of their compliance policies

OL Connect encompasses an easy-to-use design tool with features to create, style, format, and personalize communications. Fill templates with dynamic text, graphics, images, charts, barcodes, folder inserter control marks, and more.

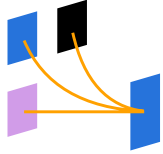
Connect offers financial firms with a versatile solution that integrates seamlessly with existing business systems without any changes to the current infrastructure or requiring additional investments.

With OL Connect, businesses can digitize client communications, increase revenue, and improve the customer experience with customized correspondence.

Financial institutions can leverage OL Connect to surpass customer expectations, empower employees to be more productive, increase profitability, and gain competitive advantage within the market.

Transform operations and drive efficiency with automation

Eliminate manual tasks, banish integration bottlenecks, and boost productivity



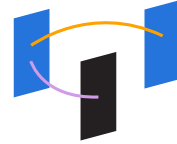
Simplify daily work

Digitize and automate workflows to maximize employee productivity. Eliminate manual intervention, error-prone tasks, stacks of paper, and missing files.



Flexible design tools and delivery

Create attractive, concise, modern statements and correspondence for customers across multiple channels without loss of context and continuity.



Powerful data integration

Manage all your content and data from any source, line of business, or legacy systems. Easily populate documents and workflows with captured data.



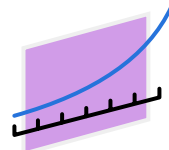
High-volume printing made easy

Ensure print operations can handle high-volume workloads with minimal error or print only what you need to reduce waste.



Deliver personalized services

Interactive and tailored communications are available anytime, anywhere, and on any device.



Save time and money

Financial firms can rest easy knowing that the hundreds of documents streaming through their facilities are accurately filed, processed, and organized.

Success story

International bank

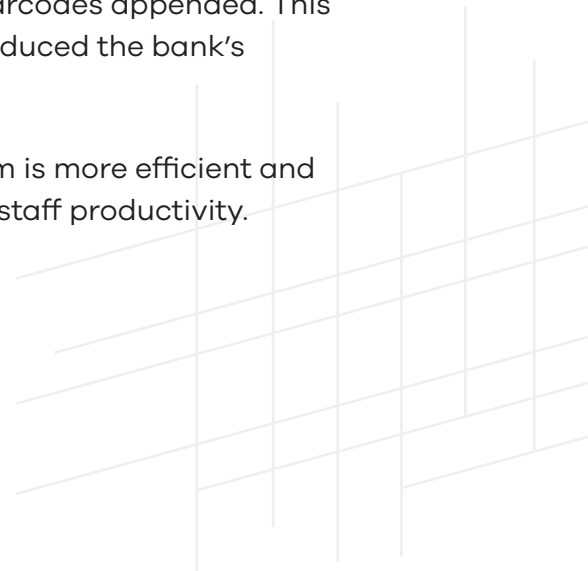
An international bank with branches across 30 different countries engaged us to help eliminate the manual handling and sorting of documents and to improve document integrity by switching to automated processes. The bank's vision was to seamlessly capture data in its host IT system and to send personalized statements to customers.



OL[®] Connect solution

OL Connect created a closed internal communication process to meet the bank's security requirements and accurately capture, design, and distribute the statements, with appropriate barcodes appended. This significantly reduced the bank's postage costs.

The new system is more efficient and has increased staff productivity.



Success story

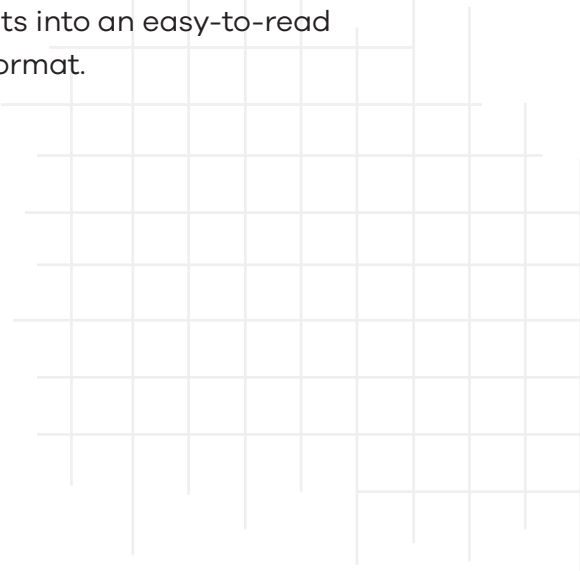
Insurance company

One of the largest insurance companies wanted a document management solution that would streamline the processes of extracting and entering customer data and placing it in the correct core business system.



OL[®] Connect solution

By using OL Connect, the company automated this process and reduced the risk of error. It also improved the customer experience by refreshing the look of policy documents and providing readers with the option to reformat the documents into an easy-to-read booklet format.



Success story

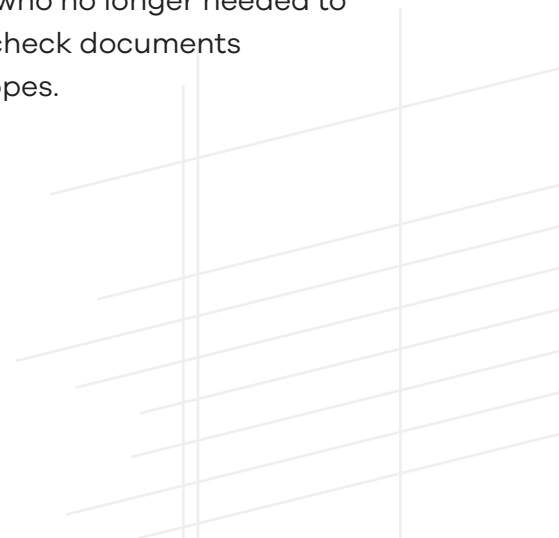
Superannuation Provider

A superannuation provider specializing in public sector clients was experiencing issues with their manual processes for printing, collating, and distributing large quantities of sensitive customer documentation that was produced by various applications. After experiencing privacy breaches, the superannuation provider engaged us to provide an efficient and automated solution.



OL[®] Connect solution

OL Connect helped the organization move to an automated, digital process and eliminated the need for manual handling, significantly decreasing the risk of a privacy breach. It also cut costs and increased the productivity of staff members, who no longer needed to manually check documents and envelopes.



Solutions

Leverage data across systems and documents and automate processes

Document management

The scenario

A large percentage of information available within financial institutions is often scattered across a variety of different systems and repositories, such as shared network drives, email, document management systems, and file-sharing applications. Duplication of content across many information silos is common, and businesses waste significant time searching for information. The lack of communication or visibility across multiple sources prevents data enrichment of related information stored in other locations. Inefficient manual processing and labor-intensive document handling heightens the risk of error.

Challenges

- Inability to retrieve important information from multiple systems
- Higher printing costs from paper dependency
- Late payments and violations of business agreements caused by lost or incorrect documents
- Struggles with compliance due to resource shortages for oversight and monitoring

OL[®] Connect solution

OL Connect supports regulatory compliance and audit requirements. Switching between digital documents stored in the same application is quicker than shuffling through stacks or files of paper. Employees can simply map and integrate all data and automatically search and capture what is necessary. Financial firms can reduce paper and benefit from more efficient workflows with document retrieval right at their fingertips.



Process automation

The scenario

The shift from paper-based to electronic systems originally gave way to new, streamlined processes where data could be easily shared and stored. Now, departments such as accounts payable are pivoting to managing the influx of data, collaborating effectively, prioritizing time spent on projects and, as a result, maximizing efficiency.

Challenges

- Many companies struggle to understand internal procedures for document processing
- Headquarters and field offices may not implement uniform workflows
- Coordinating the IT, business, and marketing teams can be challenging when business communications are siloed

OL[®] Connect solution

OL Connect automates processes and integrates with existing and third-party applications and systems. Trigger business processes with ease and apply corporate standards and guidelines for creating, processing, and delivering communications. Businesses can simply configure their own rules to automate any task such as archiving a document, making a copy on a remote server, or sending group email confirmations.

Solutions

Enhance document creation, ensure security, and drive customer interactions

Interactive and multi-channel communications

The scenario

Financial firms are seeking ways to send personalized and interactive multi-channel customer correspondence with compelling offers, and true self-service convenience. However, many businesses produce a high volume of correspondence daily and implementing an effective solution is difficult.

Challenges

- Reduced engagement and loyalty rates
- Heavy postal costs, high risk of data-entry errors, and compliance issues
- Costly system integrations and resource shortages
- Collecting data and documents across multiple systems and sources

OL[®] Connect solution

OL Connect liberates companies from inflexible IT systems and releases data from the systems keeping them hostage. By unlocking and integrating data, businesses can effectively create, personalize, and automatically deliver communications via multiple outputs. Intelligent customer communication tools enable custom billing, hyperlinks, action buttons, as well as interactive graphs and charts that allow customers to analyze information through their preferred delivery channel. OL Connect interacts with the existing environment to deliver a cost-effective communications system that is secure and user-friendly.



Security and regulatory compliance

The scenario

Financial institutions today are increasingly sharing a wealth of information to their service providers for document composition, printing, and posting. The movement of raw data to external parties creates the potential for new security data breaches, especially at a time where stricter compliance regulations have been imposed. Banking and financial firms need to secure the storage, transit, and use of corporate and personal data across business applications.

Challenges

- Prevent security breaches and financial loss
- Ensure customer privacy and security
- Manage and process raw data scattered in various systems
- Arduous print and delivery processes

OL[®] Connect solution

OL Connect enables financial institutions to transition to a streamlined data management system where data can be captured, processed, delivered, and stored from various systems and sources. By maintaining an efficient data management infrastructure, confidential information can be managed in-house, eliminating the extra cost of third-party processing. OL Connect reduces security risk, facilitates compliance, and improves efficiency.

Engage with us.

Upland Objectif Lune helps companies automate business communications processes with its digital transformation solutions. With OL Connect technology, customers can create, manage, distribute, and automate transactional and promotional documents while solving the challenge of integrating systems.

If you'd like more information on our product, contact our team to set up a comprehensive product demonstration.

Reach out to learn more



uplandsoftware.com/objectiflune
[Request a demo](#)