Case Study: Financial Services

# ABN AMRO

## Delivering highly personalized letters

When you print 700,000 bank statements a day it is hardly surprising if, as a bank, you mainly think in terms of bulk output. However, many other types of documents – from letters and policies to contracts and advertising brochures – are produced within ABN AMRO. About 5,000 different document types are sent to customers every day, originating from 12 business units.

## Challenge: breaking with 'bulk thinking'

ABN AMRO involved Tridion and its partners Group1 and Document Dialog to break with 'bulk thinking' and create an infrastructure to quickly and flexibly generate and control output. In a dynamic commercial environment, printed documents are continuously updated. The existing document change process at ABN AMRO meant changes to a document would easily require 40 hours of IT capacity.

Ramon de Vries, OMS (Output Management) Project Manager at ABN AMRO, says: "Before a document could be modified, an impact analysis was made to determine the conse-quences of the changes. Then changes were made and the test procedure was started, first within IT itself and subsequently in the pre-production environment. Next the document was sent for final approval. This procedure could result in lead times of up to two weeks, which we regarded as 'very undesirable'."

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>
> Ramon de Vries,
> Output Management Project Manager, ABN AMRO

## Benefits: efficiency improvement

ABN AMRO wanted to eliminate IT involvement for document changes. Ramon de Vries explains: "Reducing the time-to-market of documents was an important argument for organizing the infrastructure more effectively. Another reason is to achieve a customer oriented approach.

"ABN AMRO thinks in terms of customer groups. You want to provide each target group with targeted and relevant information. We needed to deliver ad hoc messages in smaller volumes, as well as more flexibility and the capability to change documents quickly (in real-time). It was an ideal time to change the output environment."

The result is a fully-fledged integration between the Tridion content management system and DOC1, the Group1 software used by the bank for document output. The integration enables business users to create and change documents themselves.

"The content of the documents is separated into different elements." De Vries explains. "Business logic and letter content are maintained separately. Content is generated by the Tridion CMS, and the data is supplied by business applications. The data is enriched with customer data, such as name, address and related branch data. The creation, preview and approval process is done within Tridion. It uses data from the business applications, and a preview document can be generated thanks to the integration with DOC1."

## Proof: investment recouped

The result is a huge efficiency improvement for the IT staff of Output Management, who previously had to retype whole chunks of text. For business people the new solution is beneficial too: "This is clearly catching on with our business people as they can see that we are creating a solution that facilitates customer-orientation," De Vries says.

"And as far as Output Management is concerned; we are now able to combine several document types (including smaller volumes) into a single run. This means that we can work more efficiently. At the same time we see that the business has assumed more responsibility over their documents." De Vries comments with satisfaction, "It is fair to say that changing our infrastructure and the innovative ideas of the bank's IT organization have led to an evaluation of organizational processes."

The investments in the Tridion and DOC1 integration have been quickly recouped. The development time of new documents is drastically reduced and the business can now do the work itself, without IT involvement.

This fits in well with ABN AMRO's strategy to achieve high customer satisfaction. As it now has a better overview of all messages it sends to its customers, the chances of sending unnecessary or illogical messages have been reduced. And since all documents originate from Tridion, brand and messaging consistency are guaranteed.

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