

SpareBank
SR-BANK



CUSTOMER SUCCESS STORY



XperiDo

***SR-BANK, TURNING A
CHALLENGE INTO AN
OPPORTUNITY TO
TRULY INNOVATE.***

SpareBank 1 SR-Bank is Norway's largest regional bank and the second largest Norwegian-owned bank. As a full-service retail and corporate banking institution, SR-Bank offers a diverse range of financial services such as loans, savings, advice, insurance and pensions for both personal and corporate customers. As a Microsoft Dynamics CRM client, the business also relies on an integrated documents creation and output management solution.

Several years ago, and following an intensive evaluation process of suitable document creation solutions, XperiDo by Invenso was shortlisted alongside the competitor solution.

SR-Bank chose to implement the competitor solution, which served its purpose, generating large agreements based on fixed templates for both corporate and retail banking clients.

The corporate division, being the primary user of the chosen document creation solution, was satisfied with the functionality of the application but the business support division, in charge of the continuous development and technical support, found the application to be somewhat cumbersome and labour intensive, especially when an internal user required a change to an existing template or document flow.



THE CHALLENGES

As a high priority, both SR-Bank and their appointed technical CRM advisors (Avanade, a global joint venture enterprise between Microsoft and Accenture) began their search for a reputable software vendor with a suitable solution and quick turn-around service. SR-Bank also consulted directly with Microsoft to obtain relevant information and the recommendation of Microsoft about a suitable and easy-to-use document generation add-on for Microsoft Dynamics CRM 2016.

Unanimously, all parties involved, each arrived at the same conclusion that one provider and their innovative solution was repeatedly being put forward as the industry leader in document creation and output management: XperiDo by Invenso – a custom integration built specifically for Microsoft Dynamics CRM and implemented globally as part of various large-scale business efficiency and technology-driven transformation projects.

“XperiDo is a quick, easy and intuitive documents generation tool that does the job, each time for each customer, at a click of a finger.”

**XPERIDO, AS DESCRIBED BY
SR-BANK TEAM MEMBERS**



THE RESCUE PLAN

Both the commercial and technical XperiDo teams pulled out all stops and within one week from signing the commercial agreement, XperiDo for Microsoft Dynamics had been installed at SR-Bank and the application was fully up and running.

“XperiDo was considered an eye-opener for many internal users and stakeholders, in particular the advanced capabilities in template design through an intuitive user interface which empowered all SR-Banks divisions and process owners to really maximise the utilisation of XperiDo for Microsoft Dynamics CRM in the optimisation of client contact processes.”

Through the implementation and the usage of the XperiDo document generation solution, SR-Bank supported by the Invenso implementation team raised the bar in terms of the compliance with internal best practice policies on how to generate,

“We were really impressed by the speed, capability and efforts put into the migration of the discontinued document creation application and the deployment, training and quick turn-around support provided by the team at Invenso.”

**SILJE ERIKSEN BØLLA, LEDER
SYSTEMFORVALTNING**

store and provide documents generated through XperiDo vastly improved.

SR-Bank benefited from the convenient and logical user interface built into the XperiDo document generation solution for customisation. With XperiDo, the customisations can be made by the respective business process owner within the SR-Bank division alleviating the time pressure placed on the IT business support team to assist.

XPERIDO – BUILT TO SOLVE PROBLEMS

Through the XperiDo for Dynamics 365 CRM integration, the final client documents can be securely stored on the required Sharepoint location and an e-signature can easily be obtained from the client through the integrated DocuSign functionality.

In addition to the corporate division, both the retail division and the back-office operation of SR-Bank each benefited, in their own right, from the newly implemented XperiDo for Dynamics CRM solution.

Once XperiDo for Dynamics CRM was launched, several other possibilities to utilise the document generation solution were identified. This effect, combined with many other newly acquired advantages native to the XperiDo solution, meant

that the Total Cost of Ownership of the XperiDo for Microsoft Dynamics CRM application was far more beneficial than the previous application.

XperiDo offers internal users across various business divisions an integrated way to efficiently generate consistent documents that meet both the stringent financial industry regulation requirements but also satisfy the internal needs for best-in-class process compliance.

SR-Bank recommends XperiDo.

PROJECT PROFILE

Technology

Upgrade to Microsoft Dynamics 2016
XperiDo 3.4 for Microsoft Dynamics

Phase-out solution

Quickbix Document Suite for
Microsoft Dynamics CRM





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XperiDo

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