



BANK GUARANTEE COLLABORATION

Improve productivity of your trade finance operations using Collaboration Controls for Microsoft Power Platform





BANK GUARANTEE COLLABORATION

WHAT WE OFFER

Capgemini's Bank Guarantee Collaboration solution empowers bank employees to orchestrate end-to-end processes across your bank to review, comment, and finalize the contract, resulting in increased productivity and significant reduction of operational risk. The solution leverages Microsoft Collaboration Controls to add M365 capabilities to your line of business Power Apps applications to enable contextual collaboration around business processes and enhance interaction among employees and the customers.

Key Highlights of Capgemini's Bank Guarantee Collaboration solution:

- **Customer Portal:** Customers can request bank guarantee digitally and upload the supporting documents.
- **Collaboration Manager:** The employee experience is delivered using Microsoft Teams with workflow capabilities which can be customized as per bank needs to enable collaboration between various employees.
- **E-signature:** Ability to request digital signature from the customers using Adobe e-sign

Capgemini's Engagement Model: A typical engagement can range from 4-8 weeks where a team of experts from Capgemini can build the omnichannel experience for customers as a POC and build a backlog for delivering these capabilities in the production environment.





6-WEEK RAPID PROTOTYPING ENGAGEMENT MODEL

Consult- 1 Week

- Identify and Engage with key business stakeholders
- Understand the business challenge and identify suitable use cases that can benefit from Power Apps & Microsoft Cloud for Financial Services implementation
- Define scope and success criteria for MVP
- Assess environment readiness



Design & Implement – 4 Weeks

- Deploy Microsoft Collaboration Controls solution components in your tenant
- Customize Capgemini's Bank Guarantee Collaboration solution
- Iterative build of Minimum Viable product (MVP)
- Show and tell sessions with stakeholders



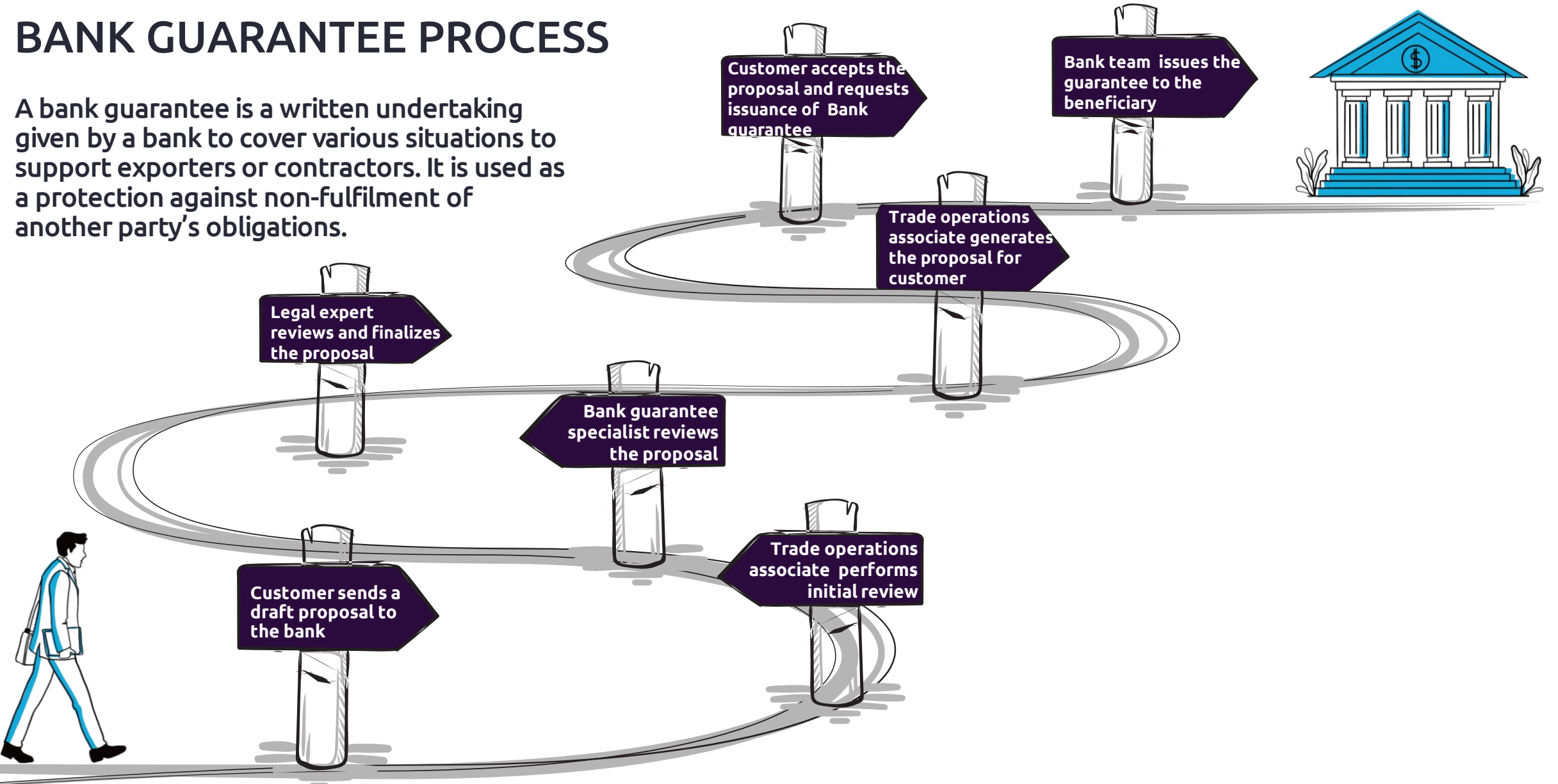
FEEDBACK & BACKLOG CREATION – 1 Week

- Demonstrate business value of Bank Guarantee solution for automating collaborative workflow process
- Seek feedback from key stakeholders on the MVP
- Create roadmap/epics for future enhancements, integrations with your system of records and org-wide rollout
- Conclude with Report and Recommendations for next steps and action items



BANK GUARANTEE PROCESS

A bank guarantee is a written undertaking given by a bank to cover various situations to support exporters or contractors. It is used as a protection against non-fulfilment of another party's obligations.





COLLABORATION CONTROLS

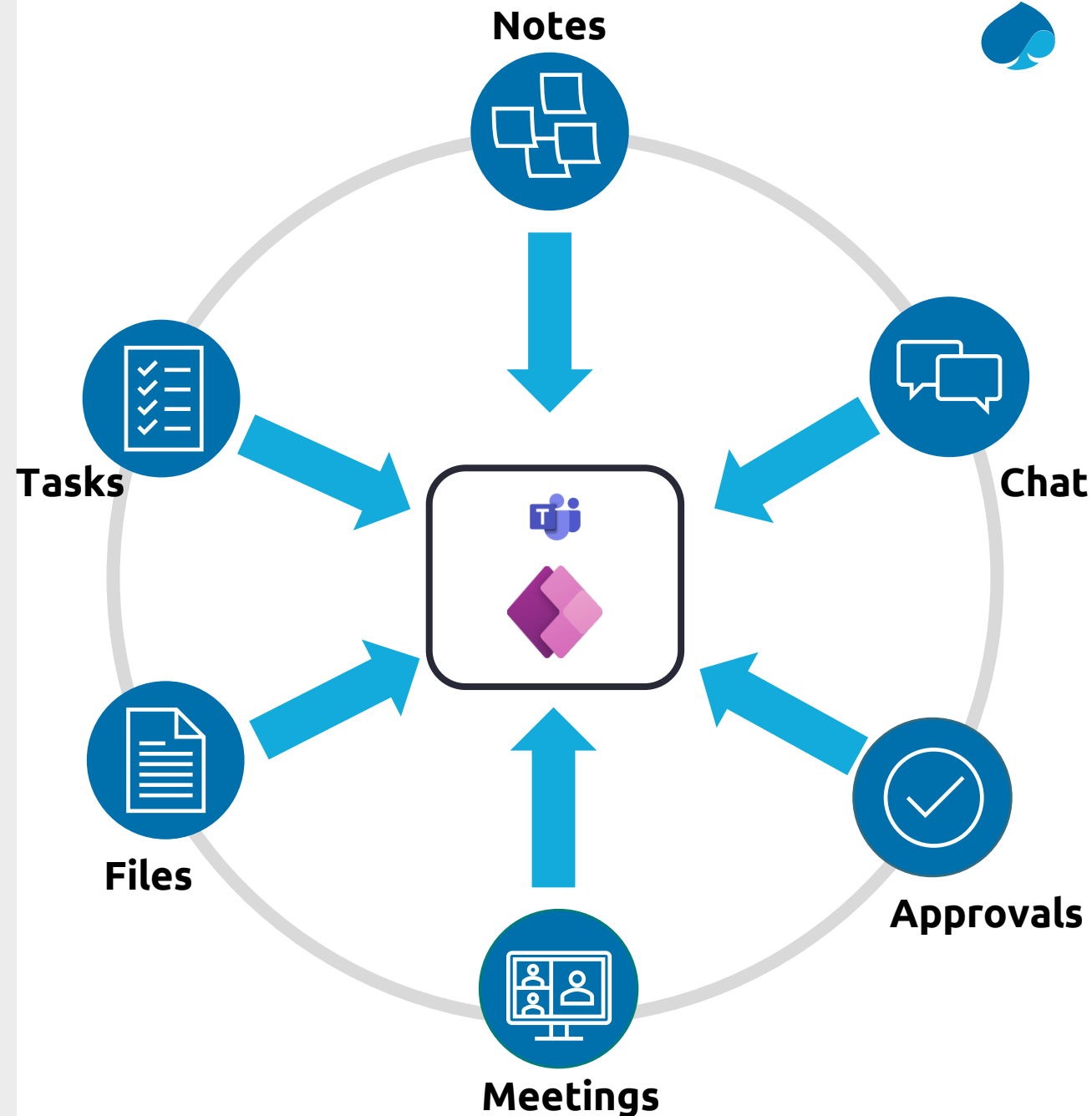
Capgemini is an early adopter and launch partner of the [Microsoft Cloud for Financial Services](#) and the [Microsoft Collaboration Controls](#). We worked closely with the Microsoft engineering team to develop our solutions built specifically to work inside Microsoft Teams. As an early adopter, we can accelerate the integration of M365 services with your Power Platform Apps.

Benefits

- Empowers employees to easily adopt the new ways of working
- Enables contextual collaboration to increase productivity
- Expedites the underlying business process
- Creates a digital trail of collaboration records in the context of the work
- Abstraction from the underlying diverse technologies & services

Outcome

A unified, enhanced, integrated experience right within the App in the flow of work





YOUR PERSONAL DETAILS

Full Name: Ben Doe

Email Address: bendoe224@gmail.com

YOUR GUARANTEE DETAILS

Search

Guarantee Request Title	Request ID	Beneficiary	Request Stage	Created By (Contact)	Created On ↓	Customer Tasks
Contract for renovation of PNC Arena stand	GR-1103	Shield Constructions	Initial Review	Ben Doe	7/25/2022 5:39 PM	<input type="button" value="v"/>
Contract for new airport passenger lounge	GR-1102	Shield Constructions	Close	Ben Doe	7/18/2022 3:16 PM	Agreement Complete <input type="button" value="v"/>

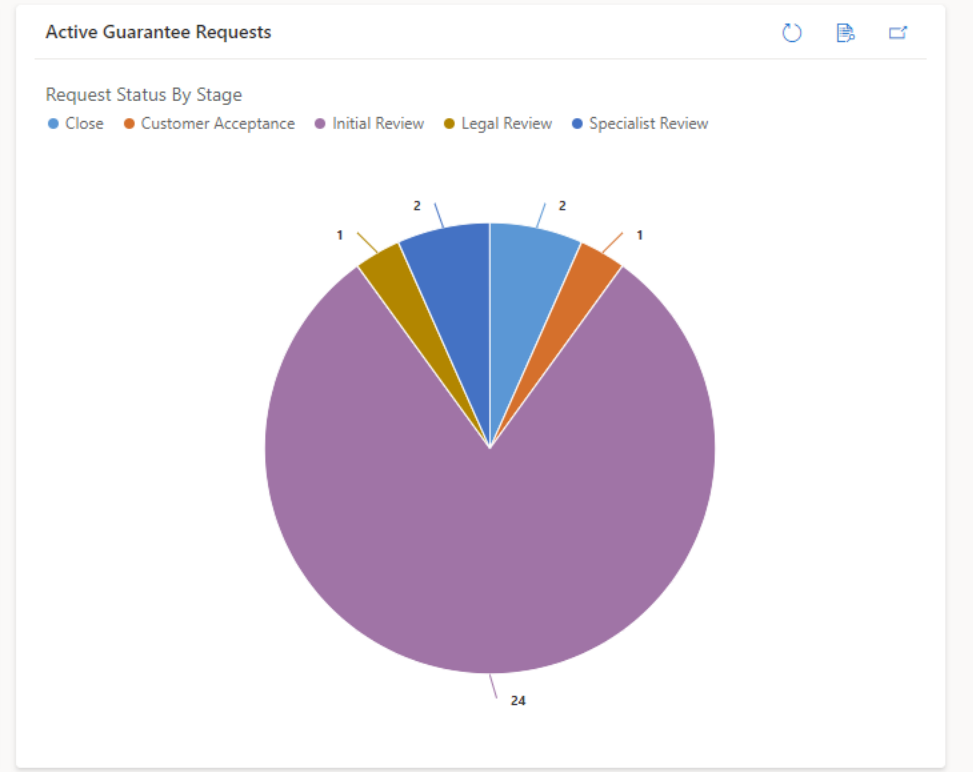
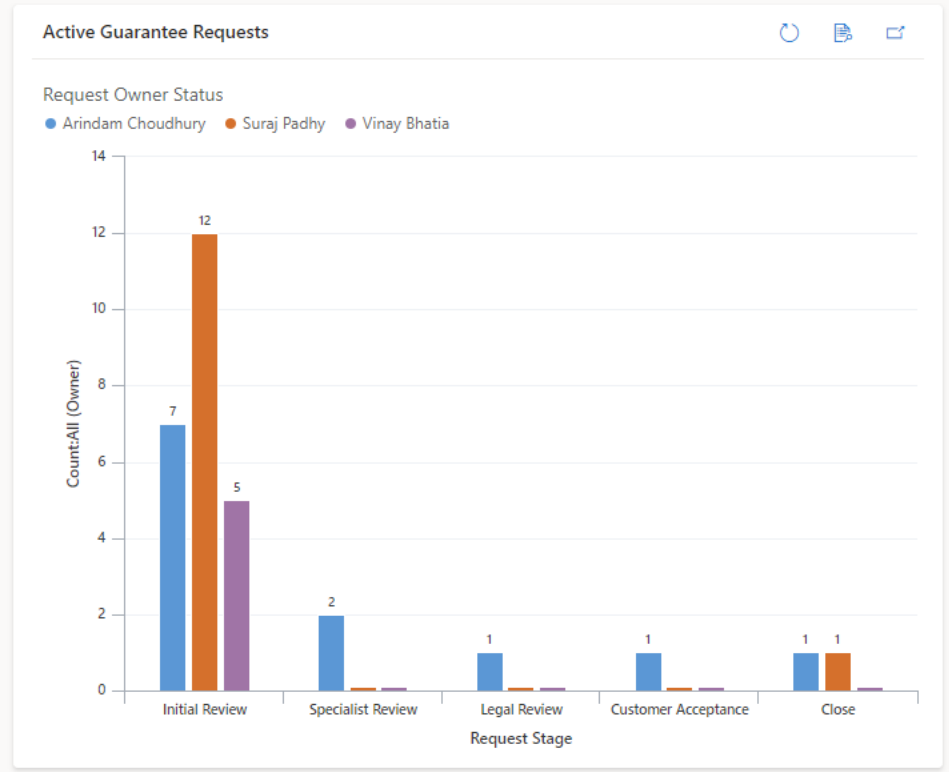
Teams

Your teams

- Financial Services
 - General
 - Bank Guarantee
- Bank Guarantee Requests
- FS Collaborative Apps
 - General
 - Bank Guarantee Request App

Activity, Chat, Teams, Calendar, Calls, Files, Apps, Help, Join or create a team

Bank Guarantee Dashboard



Active Guarantee Requests - Assigned to me

+ New | Delete | Refresh

Search this view

Request ID	Guarantee Request Title	Request Stage	Owner	Created By (Contact)
GR-1103	Contract for renovation of PNC Arena stand	Initial Review	Suraj Padhy	Ben Doe
GR-1102	Contract for new airport passenger lounge	Close	Suraj Padhy	Ben Doe

Teams

Your teams

- FS Financial Services
- General
- Bank Guarantee
- BG Bank Guarantee Requests
- FC FS Collaborative Apps
- General
- Bank Guarantee Request App

Bank Guarantee Request App Posts Files Wiki Bank Guarantee Requ... +

Meet

Contract for renovation of PNC Arena stand - Saved

Guarantee Request · Information

Suraj Padhy (Owner) | Levi Brothers (Customer) | Ben Doe (Customer Contact) | Initial Review (Request Stage) | Close



Summary **Details** Meetings Tasks Notes Files Approvals Related

Guarantee Request Title	Contract for reno...	Request ID	GR-1103
Guarantee Request Description	This renovation will increase the capacity of the stand increasing	Beneficiary	Shield Constructi...
Customer Advising Bank	Woodgrove b...	Beneficiary Contact	Brandon Flores (S...
Advising Bank Branch	Woodgrove L...	Customer	Levi Brothers
Contract Amount	\$1,400,000.00	Customer Contact	Ben Doe
Contract Date	7/28/2022	Customer Acceptance Completed	No
Guarantee Amount	\$550,000.00		
Expected Issue Date	---		
Expiry Date	---		
Text Standard	---		
Type of Undertaking	---		
Underlying Contract Type	---		
Value of Contract	---		

Identity Details

Identity Document Number	11234568
Identity Document Expiration Date	2014-08-31
Date of Birth	1977-08-31
Gender	F
Street Address	2570 24TH STREET ANYTOWN, CA 95818
Region	California
Country	USA

Customer Information

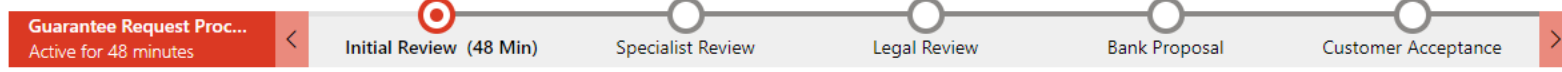
First name	Ben
Last name	Doe
Job Title	---
Email	bendoe224@gmail.com

- Teams**
- Your teams
- Financial Services
 - General
 - Bank Guarantee
 - Bank Guarantee Requests
 - FS Collaborative Apps
 - General
 - Bank Guarantee Request App

Bank Guarantee Request App Posts Files Wiki Bank Guarantee Requi... +

Contract for renovation of PNC Arena stand - Saved

Suraj Padhy (Owner) | Levi Brothers (Customer) | Ben Doe (Customer Contact) | Initial Review (Request Stage)



Summary **Details** Meetings Tasks Notes Files Approvals Related

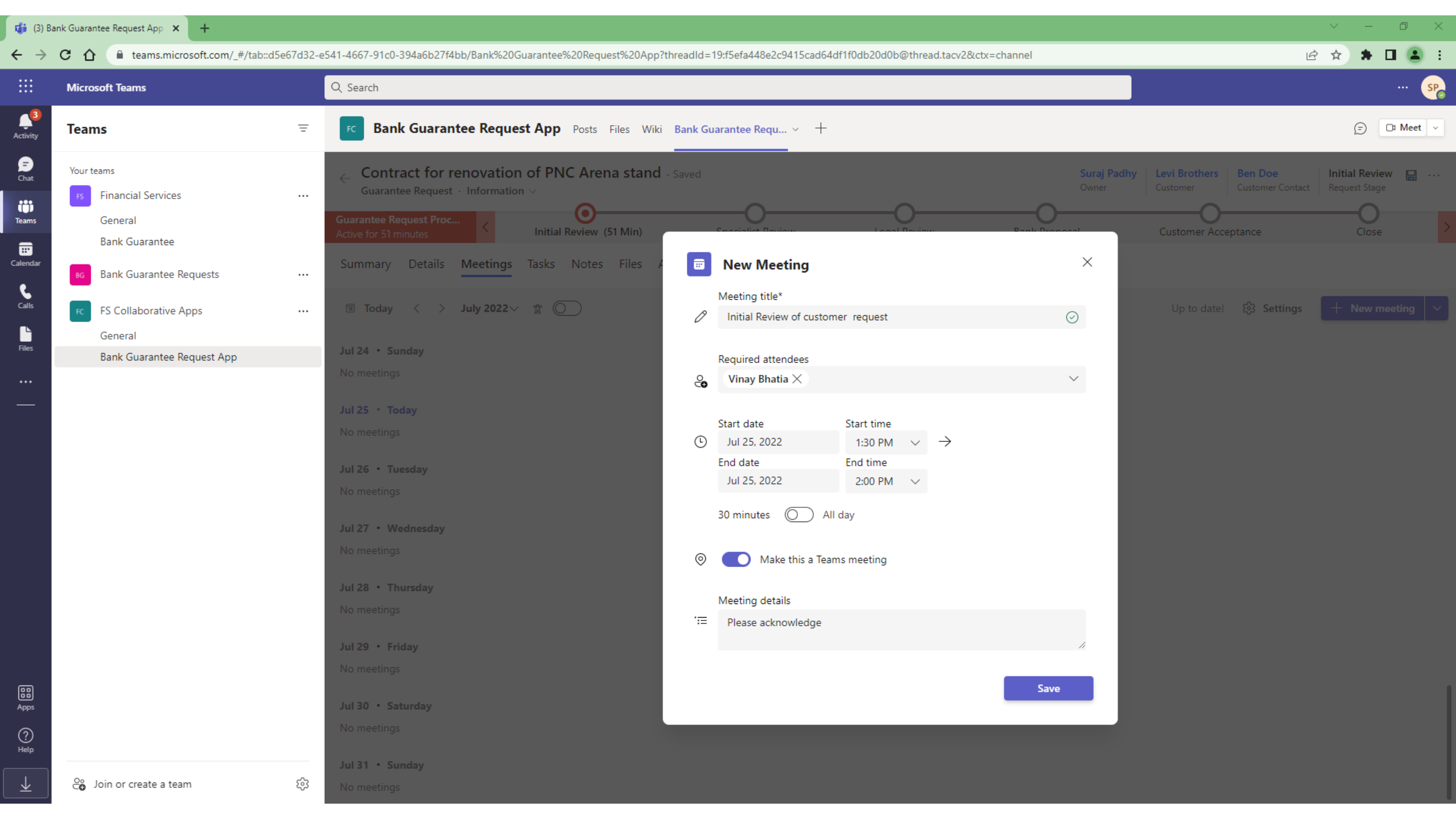
Guarantee Request Title	Contract for renovation of PNC Arena stand	
Guarantee Request Description	This renovation will increase the capacity of the stand increasing revenue for the stadium	
Customer Advising Bank	Woodgrove bank	
Advising Bank Branch	Woodgrove Louisville branch	
Contract Amount	\$1,400,000.00	
Contract Date	7/28/2022	
Guarantee Amount	\$550,000.00	
Expected Issue Date	---	
Expiry Date	---	
Text Standard	---	
Type of Undertaking	---	
Underlying Contract Type	---	
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Street Address	2570 24TH STREET ANYTOWN, CA 95818
Region	California
Country	USA

Customer Information	
First name	Ben
Last name	Doe
Job Title	---
Email	bendoe224@gmail.com

Customer Onboarding

Vinay Bhatia - Can you confirm is the customer KYC is completed ?



New Meeting [Close]

Meeting title*
Initial Review of customer request

Required attendees
Vinay Bhatia

Start date: Jul 25, 2022 Start time: 1:30 PM
End date: Jul 25, 2022 End time: 2:00 PM

30 minutes All day

Make this a Teams meeting

Meeting details
Please acknowledge

Save

- Teams**
- Your teams
- Financial Services
 - General
 - Bank Guarantee
 - Bank Guarantee Requests
 - FS Collaborative Apps
 - General
 - Bank Guarantee Request App**

Bank Guarantee Request App Posts Files Wiki Bank Guarantee Requ... +

Contract for renovation of PNC Arena stand - Saved
Guarantee Request - Information

Guarantee Request Proc...
Active for 51 minutes

Initial Review (51 Min)

Summary Details **Meetings** Tasks Notes Files

Today < > July 2022

Jul 24 • Sunday

No meetings

Jul 25 • Today

No meetings

Jul 26 • Tuesday

No meetings

Jul 27 • Wednesday

No meetings

Jul 28 • Thursday

No meetings

Jul 29 • Friday

No meetings

Jul 30 • Saturday

No meetings

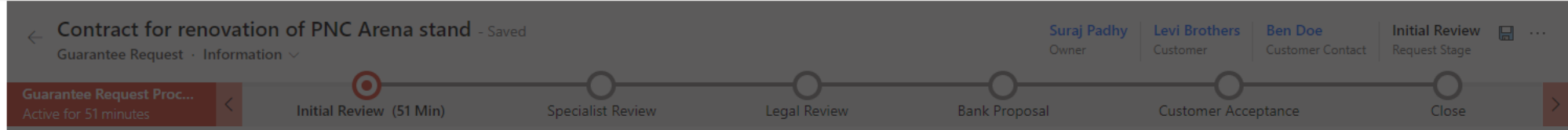
Jul 31 • Sunday

No meetings

Join or create a team

Left sidebar navigation menu including Activity, Chat, Teams, Calendar, Calls, Files, and App icons.

Bank Guarantee Request App - Contract for renovation of PNC Arena stand - Saved



- Summary Details Meetings Tasks Notes Files
+ Add a task
Title
Review against similar transactions
Review the guarantee text in compliance with URDG
Perform sanction screening of all parties mentioned in the req
Check the application for completeness
Ensure document, received via attachment is legible to proceed
Create an updated version of the contract

Tasks in Collaboration Manager dialog box. Includes fields for Title (Review this project with the county offices), Assignee (Arindam Choudhury), Priority (Normal), Progress (Not Started), Start date (July 26, 2022), and Due date (July 29, 2022). Includes a Save button.

Table with columns: Due date, Progress. Shows multiple rows with dates (7/29/22) and status (Not Started).

Process flow: Contract for renovation of PNC Arena stand - Saved. Stages: Guarantee Request Proc... (Active for 51 minutes), Initial Review (51 Min), Specialist Review, Legal Review, Bank Proposal, Customer Acceptance, Close. Roles: Suraj Padhy (Owner), Levi Brothers (Customer), Ben Doe (Customer Contact), Initial Review (Request Stage)

Navigation tabs: Summary, Details, Meetings, Tasks, Notes (selected), Files, Approvals, Related

+ New note button and Filter button

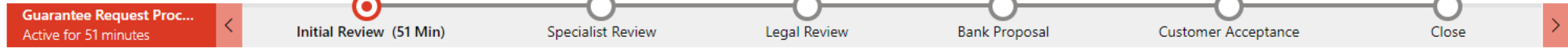
Note card: Notes from the Customer Meeting. Last updated Jul 25, 2022, 6:48 PM. Content: Guarantee terms reviewed and agreed upon. Participants - Ben Doe - Customer, Vinay Bhatia. Buttons: Discard, Save

Microsoft Teams sidebar navigation:

- Activity (3)
- Chat
- Teams
- Calendar
- Calls
- Files
- Join or create a team
- Apps
- Help

Bank Guarantee Request App Posts Files Wiki Bank Guarantee Requ... +

Contract for renovation of PNC Arena stand - Saved
Guarantee Request · Information



Summary Details Meetings Tasks Notes **Files** Approvals Related

Upload Settings Find

Documents > Customer Uploaded Documents				
Name	File size	Modified by	Modified ↓	Created by
Identity Documents	73.45 KB	FSCOE Service	07/25/22, 05:40 PM	FSCOE Service
Bank and Tax Statements	1.66 MB	FSCOE Service	07/25/22, 05:40 PM	FSCOE Service
Contract Documents	352.91 KB	FSCOE Service	07/25/22, 05:40 PM	FSCOE Service

Empty space for document content or additional details.

Activity (3)

Chat

Teams

Calendar

Calls

Files

...

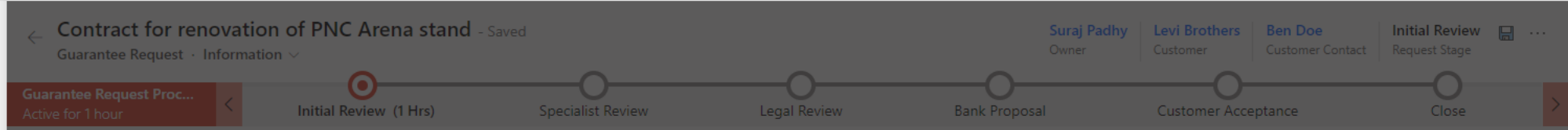
Apps

Help

Join or create a team

Bank Guarantee Request App Posts Files Wiki Bank Guarantee Requ... +

Meet



Summary Details Meetings Tasks Notes Files

+ New approval request

Approvals Create a new approval request

Name of request*

Proceed without old bank statements

Approvers*

Arindam Chou... X

Require a response from all recipients

Additional details

If needed, add some extra info that'll help the recipients learn more about the request

Attachments Add attachment

Send

Teams

Your teams

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- General
- Bank Guarantee Request App**

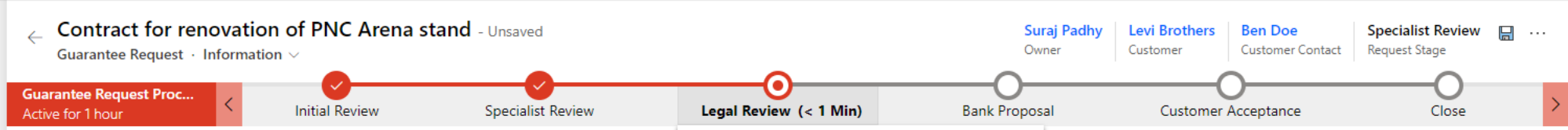
Join or create a team

Bank Guarantee Request App Posts Files Wiki Bank Guarantee Requ... +

Contract for renovation of PNC Arena stand - Unsaved

Guarantee Request · Information

Suraj Padhy (Owner) | Levi Brothers (Customer) | Ben Doe (Customer Contact) | Specialist Review (Request Stage)



Summary Details Meetings Tasks Notes **Files** Approvals Related

Upload

Documents > WorkingDocuments

Name	File size	Modified
GR-1103-Bank Guarantee Customer Document.docx	40.05 KB	FSCOE

Active for less than one minute

- ✓ Expected Issue Date * 8/24/2022
- ✓ Contract Date * 7/28/2022
- ✓ Text Standard * **Bank Standard**
- ✓ Expiry Date * 8/24/2023
- ✓ Legal Review Completed * **Yes**

Next Stage

Settings Find

Created by
FSCOE Service

BANK GUARANTEE AGREEMENT

Capgemini Financial Services
Bank Guarantee Department, Baltimore MD

Beneficiary: Shield Constructions

Date: Monday, July 25, 2022

BANK GUARANTEE No.: GR-1103

We have been informed that Levi Brothers (the "Contractor") has entered into Contract No. GR-1103 dated 7/28/2022 with the Shield Constructions (the "Beneficiary") for the provision of Contract for renovation of PNC Arena stand (the "Contract").

The type of undertaking of this contract is Performance

The underlying contract type is Project

Start



SOLUTION BENEFITS: DELIVER DIFFERENTIATED CUSTOMER EXPERIENCES & EMPOWER EMPLOYEES

Increase efficiency and productivity by leveraging **Microsoft Collaboration Controls** to orchestrate process workflow & minimize context switching between different applications

Digitize and streamline process



Reducing application processing time by **55%**

Template & Document Mgmt, Doc Co-Authoring & eSign



Centralized Repository - Single Version of Truth



Improve customer experience with self service tools



Increase revenues **\$\$\$**

Reduce operational risk & increase compliance





CAPGEMINI BANK GUARANTEE COLLABORATION

Microsoft Partnership:

<https://www.capgemini.com/partner/microsoft/>

Contact us: microsoft.fs@capgemini.com

Learn more:

<https://appsource.microsoft.com/en-us/marketplace/consulting-services/capgemini-group.bank-guarantee-collaboration>

Microsoft
Partner



Gold Cloud Platform
Gold Security
Gold DevOps
Gold Application Development
Gold Data Platform





About Capgemini

Capgemini is a global leader in partnering with companies to transform and manage their business by harnessing the power of technology. The Group is guided everyday by its purpose of unleashing human energy through technology for an inclusive and sustainable future. It is a responsible and diverse organization of 270,000 team members in nearly 50 countries. With its strong 50 year heritage and deep industry expertise, Capgemini is trusted by its clients to address the entire breadth of their business needs, from strategy and design to operations, fuelled by the fast evolving and innovative world of cloud, data, AI, connectivity, software, digital engineering and platforms. The Group reported in 2020 global revenues of €16 billion.

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