

A grayscale background image showing a woman in the foreground holding a tablet, with silhouettes of business professionals in the background. A white line graph with circular markers is overlaid on the image. The bottom of the page features a large orange curved shape.

A Leading Global Bank Streamlines **Content Management with Newgen**



Seamlessly onboards an average
of 100 new customers on daily basis

About the Client

The client is a prominent financial institution, known for its exceptional services and customer-centric approach. It offers a wide range of banking and financial solutions to individuals, businesses, and corporations. With a strong focus on infrastructure development, the bank plays a vital role in supporting and financing major projects in the country.

Operational Roadblocks

Ensuring better customer relationships and experience required business users to access information easily and securely. This included accessing a diverse variety of documents in various formats. Users had to spend a significant amount of time chasing down the right documents and coordinating between teams. The bank faced several challenges in managing documents. This impacted workforce productivity and resulted in limited collaboration. To address content management issues and improve operational efficiency, the bank decided to streamline its content management.

Challenges Snapshot



Key Objectives

The Bank Wanted to:

- **Streamline Document Management:** Automate document handling processes, ensuring a streamlined and efficient workflow. Seamless integration with Salesforce facilitated smooth information flow between systems
- **Enhance Document Visibility:** Provide easy access and viewing of documents to various teams, including back-office operations, legal, and audit teams. This improved visibility allowed for better collaboration and decision-making processes.
- **Accelerate Loan Application Processing:** Streamline the review and execution of loan application documents. This optimized loan application processing, resulting in faster turnaround times and improved customer satisfaction.

Streamlined Content Management with Newgen

The bank successfully addressed their challenges and met their objectives by leveraging **Newgen's Contextual Content Services (ECM) platform. The implementation of Newgen's ECM involved the integration of various components, including:**

Lead Handoff and Service Request

- Seamless integration between Salesforce and Newgen's ECM facilitated smooth information flow
- Documents collected during lead generation were conveniently uploaded to Newgen OmniDocs document management system through web service integration
- The back-office operations team accessed and viewed these documents in the Salesforce interface during processing requests

Corporate (Wholesale) Banking

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Integration with Other Systems

Newgen's ECM integrated with the bank's existing systems and applications, such as TCS BANCS, Posidex, TiPlus, Optimus, DG Forex, and Cersai. This comprehensive integration allowed for a cohesive content management approach and optimized processes across multiple systems. By integrating with these various systems, the bank achieved interoperability, data consistency, and improved operational efficiency. This integration of Newgen's ECM with the bank's existing ecosystem played a pivotal role in ensuring a holistic content management framework and optimizing the overall banking operations.

Scale of Operations

- Over **650** branches served, ensuring extensive network coverage
- Streamlined processes benefiting **7.3 million customers**
- **20,000+** employees leveraging Newgen's ECM solution
- More than **300,000** transactions processed
- **60,000+** accounts opened to date
- Average of **100 accounts** opened daily using tab banking
- Solution caters to diverse banking segments, including rural and staff banking

Customer Speak



The Newgen platform plays a crucial role in our mission to reimagine banking and provide our corporate and retail customers with a superior banking experience. Through this technology, we have successfully delivered smart solutions that have yielded remarkable results. We are confident that this platform will be a game changer in our ongoing digital transformation journey, driving innovation and reshaping the future of the banking industry.

Chief Operating Officer

Our bank saw an all-time high of 96% sourcing of Current Account & 93% sourcing of Savings Account for business banking through the mobile application. This would not have been possible without an integrated process-centric implementation with Newgen.

Customer Service Head

Benefits and Outcomes for the Bank

Streamlined Document Management

- Automated document handling processes, reducing manual efforts and potential errors
- Improved operational efficiency and accelerated document retrieval
- Over 5,000 named users and 2,000 connections leveraged Newgen's ECM

Enhanced Document Visibility

- Seamless access to necessary documents for back-office operations, legal, and audit teams, enabling faster reviews and improved collaboration
- Improved request processing and customer service through enhanced document visibility

Improved Loan Application Processing

- Quicker reviews and approvals facilitated by efficient uploading and retrieval of loan application documents
- Reduced overall loan processing times, minimized the bank's loan application processes



About Newgen

Newgen is the leading provider of a unified digital transformation platform with native process automation, content services, communication management, and AI/ML capabilities. Globally, successful enterprises rely on Newgen's industry-recognized low code application platform to develop and deploy complex, content-driven, and customer-engaging business applications on the cloud. From onboarding to service requests, lending to underwriting, and for many more use cases across industries, Newgen unlocks simple with speed and agility.

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