One of the Fastest Growing Banks in the Middle East Simplifies **Document Management with Newgen**

Automated 50+ processes across 7 countries | Results in 60% faster turnaround time

Overview

Our customer is a leading financial institution in the **UAE and MENA** region, providing a portfolio of digital and neo-banking products and services. The bank has been expanding its footprint across multiple countries.

The customer faced difficulties in handling the voluminous influx of electronic and physical records and wanted to revamp its document-centric process and deliver a superior customer experience. To achieve the intended business objective, the bank chose Newgen as its digital transformation partner.

The Customer’s Day-to-day Challenges

The financial institution came across several obstacles in managing its records effectively. As the record volumes increased, space limitations arose, resulting in storage and infrastructure expenses. Moreover, existing systems posed difficulties in meeting necessary security standards. Other document-centric challenges included:

- *Fragmented document storage*
- *No clear standards for document retention and disposition*
- *Lengthy document retrieval process*
- *Lack of validation and transparency across processes*
- *Back-office and document handling relied on manual execution*

The Regular Industry Approach

Traditional document management involves basic workflow processes, restricting collaboration amongst users. These processes often fall short in efficiency, security, and adaptability to the evolving needs of banks. Furthermore, banks address specific pain points without investing in a holistic solution. Customizations, integrations, and compliance features are added later, one by one, translating into scalability and integration issues in the long run.

In view of the above, a comprehensive intelligent automation platform is crucial for centralizing data, ensuring end-to-end automation, minimizing manual efforts, and running scalable operations.

How Newgen Helped with its AI-first Offering?

Newgen addressed the customer's challenges differently by implementing a comprehensive **Enterprise Content Management (ECM) solution,** part of its AI-first Contextual Content Services platform.

This system unified documents and data into a single, easily accessible repository, thereby enabling efficient document retrieval, data consistency, and collaboration. The system included intelligent extraction capabilities for capturing and extracting critical information from paper and digital documents.

Built on a low-code platform, the system automated tasks, such as document uploading, scanning, indexing, and archiving invoices, thereby streamlining document management and improving data accessibility. Additionally, the platform enabled secure storage and retrieval of documents. It helped improve compliance adherence and maximize overall efficiency across banking operations.

Solution Highlights

Content Capture and Extraction

Provided a host of imaging, capture, and data extraction tools to capture content generated across multiple channels and content sources, including financial statements, applications, and forms

End-to-end Content Lifecycle Management

Enabled comprehensive management of documents with content-centric workflows, a document viewer, and intuitive search capabilities

Document Retrieval

Ensured real-time access to critical information, reducing document retrieval processes

Personalized Communication

Streamlined content generation, such as offer letters and distribution for better member communication

Information Security

Safeguarded sensitive information from unauthorized access and implemented standards for records archival and retention

Robust Integration

Seamlessly integrated with core systems and existing applications in real-time, enabling smooth operations

Tailor-made Dashboards and Reports

Customized dashboards, reports, and landing pages helped in maintaining clear visibility and timely updates on the status of cases, documents, and other critical information

Key Benefits Achieved:

- Higher workforce productivity
- 60% faster turnaround time
- Improved collaboration among users
- Increased transparency and traceability of transactions
- Enhanced security and better compliance adherence

Value Delivered

Documents archived	**Nearly 70 million files**
Document storage	**50 TB of documents**
Daily document inflow	**An average of 35,000 new documents**
Archival processes	**Over 30 low-code processes**

Conclusion

By partnering with Newgen and adopting a customized approach, our customer successfully overcame its document management challenges. By implementing a comprehensive ECM, the bank streamlined its operations and enhanced transparency and communications for its end customers.

About Newgen

Newgen is the leading provider of an AI-first unified digital transformation platform with native **process automation, content services, customer engagement,** 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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