



One of the
Largest Philippine
Banks Automates

Customer Certificates and Communications with Newgen

Automates certificate
generation by **90%** using
Newgen**ONE** AI-first CCM Platform





Where It All Started

As one of the country's largest and most trusted banks, the financial institution serves millions of customers with a diverse portfolio of retail and commercial offerings. The bank had long been following a manual approach to generate deposit-related **certificates**, including **statements**, interest **confirmations**, balance verifications, and more.

However, as digital demands grew and volumes reached around **1 million certificates annually**, the manual, fragmented approach could no longer keep pace with the bank's scale or customers' expectations.

The bank envisioned a modern communication system that was **automated, secure, and easy to manage and scale**. They needed a platform that could not only handle high volume with accuracy but also allow business teams to operate with minimal IT intervention.



The Challenges

Problem Area

What Was Happening

Certificate Generation

Certificates were created manually (in MS Word), resulting in frequent errors, inconsistent formatting, and version control errors across teams

Security and Compliance

The documents were unprotected with no QR code authentication, causing high audit risks

Delivery Channels

Document formats varied across CRM, mobile app, and email, resulting in inconsistent output

Scalability

The legacy system was unable to handle the institution's high-volume document requirements efficiently

Template Management

With no central control, every change in template required IT support

Data and System Integration

Fragmented data flow and disconnected systems slowed document generation and delivery

The Turning Point – Implementation of NewgenONE CCM Platform

Newgen stepped in with a solution tailored to the bank's scale, complexity, and compliance needs. Using its **enterprise-grade AI-first CCM platform, NewgenONE Omnichannel Customer Engagement**, Newgen digitized and automated the bank's certificate generation process end-to-end. The platform integrated seamlessly with the bank's CRM system, **Microsoft Dynamics 365**, enabling real-time data flow and faster customer communication.

The CCM platform was supported by the **NewgenONE Contextual Content Services (ECM) platform**, which provided secure, built-in document storage, ensuring easy retrieval, archival, audit readiness, and centralized control across millions of certificates.

NewgenONE CCM platform created **dynamic templates** that could **automatically generate personalized documents and deliver them across multiple channels, including email, mobile app, CRM, and social platforms**. Each template supported multipage output and followed the bank's brand style perfectly.

These capabilities, delivered as SaaS and fully managed by Newgen, helped the institution avoid the complexity of infrastructure management while gaining a scalable, always-on system.



The Impact

Target Area	Before Transformation	Post Implementation
Certificate Generation	Manual	90% automated
Processing Time (per certificate)	High	99% faster turnaround
Annual Volume Management	Strained with a high volume of documents	Seamlessly handles up to 1 million certificates
Security and Compliance	No encryption or validation	PDF password protection + dynamic QR codes and e-signatures, ensuring 100% compliance with internal audit standards
Customer Experience	Fragmented, delayed document delivery	Superior customer experience driven by real-time integrations with CRM, mobile app, and digital channels
Delivery Consistency	Inconsistent document presentation	Uniform branding across all channels
Data Fetching	Manual Inputs	Automated, with real-time API and FTP integration
IT Dependency	Every change required developer involvement	Business users manage templates independently



What Made the Solution Stand Out?

Business-first control

Editable templates without IT
bottlenecks



Real-time integration

Data flows seamlessly. No
more spreadsheet juggling



Built-in Compliance

Audit-friendly outputs with
encryption and authentication



Security

Highly secured documents



End-to-end readiness

Fully deployed across
production, UAT, dev, and DR



The Bottom Line

Unlike off-the-shelf tools, the Newgen CCM platform enabled this institution to take control, design, manage, and deploy templates without IT hand-holding and went live within a quarter. With Newgen, the bank was able to deliver timely, accurate, and audit-proof certificates at scale, saving hundreds of staff hours annually while boosting customer satisfaction. Their customers moved beyond channel-specific, fragmented access to complete their servicing journey seamlessly across their preferred channel. This shift enhanced convenience, reduced friction, and delivered a consistent, end-to-end experience that strengthened engagement and loyalty. Building on this success, the bank could explore broader opportunities to unlock additional value through the NewgenONE CCM platform.

Your Bank Could Be Next.

Looking to streamline your document generation, reduce compliance risk, and delight customers with timely communication?



Let's build your success story with Newgen.



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.

For Sales Query

AMERICAS: +1 (202) 800 77 83
CANADA: +1 (202) 800 77 83
AUSTRALIA: +61 290 537174
INDIA: +91 11 407 73769
APAC: +65 3157 6189
MEA: +971-600521468, +27-11-461-6497
EUROPE: +44 (0) 2036 514805

info@newgensoft.com
www.newgensoft.com

