



Streamlining Document Management for a Key Financial Services Provider in Botswana

Ensuring Documentation Efficiency
Under a Centralized Repository



Customer At a Glance

Our customer is a multinational African financial institution headquartered in Botswana and has a footprint across 11 sub-Saharan African nations. With over 6.6 million customers across Africa, it is focused on delivering inclusive financial and non-financial solutions, including lending, payments, insurance, and lifestyle, for individuals, micro and small entrepreneurs, and under-served populations.

Consumer Pain Points

- ▶ **Bandwidth and Performance Issues:** Storing scanned PDF document bundles in databases as blob files resulted in significant bandwidth problems and adversely impacted the performance of the core application
- ▶ **Error-prone Document Segregation:** The manual segregation of documents led to unsatisfactory user experiences and inefficiencies in document management
- ▶ **Lack of Unified View:** It was challenging to locate and reuse information effectively without a single view of business-critical data
- ▶ **Security Risks:** Both internal and external information sharing lacked adequate security measures, posing potential risks
- ▶ **Limited Search Capabilities:** Users faced challenges searching documents based on various parameters, including search-based metadata, keywords, and certain areas of the content
- ▶ **Alert Notifications:** The lack of alert notifications based on metadata types associated with documents hindered timely actions and processes
- ▶ **Separate Databases for Multiple Countries:** Maintaining different databases for document storage across 11 countries only increased complexity and inefficiency
- ▶ **Compliance Challenges:** Ensuring compliance with legal and regulatory requirements for document management became a problem for the organization

Industry Approach to the Concerns

One thing that all businesses have in common is documents. As enterprises scale, document management gets more difficult and complex. Many organizations seek advanced document management solutions with features such as a one-time scan of multiple documents, data extraction, enhanced backup and document security, workflow automation, and cloud-based storage. While there are many options in the market, every industry is unique and requires a more robust solution to cater to their unique needs. A configurable platform that can easily integrate with business applications and scale further is the need of the hour.



Transformative Steps Taken by Newgen

In a remarkable journey towards enhanced security and efficiency, Newgen successfully implemented its AI-powered Document Management System (DMS) in Botswana and empowered the financial services provider to replicate the solution across 10 additional countries in which it operates. This expansion streamlined document handling, bolstered data accessibility, heightened security measures, and simplified the search process. It was an effective response to the initial challenges faced by the customer and marked a significant milestone in their document management journey.

Core Capabilities

- ▶ **Centralized Content Management:** Implementing Enterprise Content Management (ECM) allowed the organization to manage content centrally, addressing the issue of scattered document storage
- ▶ **Efficient Document Upload and Retrieval:** Users could upload documents centrally, leading to quicker retrieval and improved bandwidth usage
- ▶ **Tailored Solution Selection:** A consultative approach was applied to select the best-fit product based on the customer's specific requirements, ensuring a customized solution
- ▶ **Proof of Concept (POC):** An extensive POC was conducted that included integration with Customer Onboarding and Loan Application processes to achieve efficient document handling and processing
- ▶ **Image Enablement:** The solution enabled image-based document handling to make it easier for users to manage and access documents
- ▶ **Document Segregation:** Auto-segregation and classification of documents, including backlogs, was achieved using enhanced document classification and organization
- ▶ **Country-specific Folder Structure:** Implementing a country-specific folder structure hierarchy improved document segregation and organization, facilitating efficient access
- ▶ **Roles and Rights-based Access:** Users were granted roles and rights-based access, ensuring both data security and controlled access to documents
- ▶ **Database Consolidation:** Merging 11 separate databases into a single information hub for four data centers reduced complexity and improved data management
- ▶ **Metadata-based Document Search:** Implementing metadata-based document search through APIs enabled efficient and accurate document retrieval
- ▶ **Backlog Data Migration:** The solution facilitated the migration of 12TB of backlog data into the Newgen system, improving data accessibility
- ▶ **LDAP Integration:** Lightweight Directory Access Protocol (LDAP) integration provided a single sign-on and enhanced security measures, ensuring secure access to the system

Implementation Impact



Achieved successful rollout of 11 countries/entities on a single platform



Cut down database software usage from 11 to 4, leading to IT Infrastructure cost saving



Achieved 30% reduction in operating cost



Improved efficiency and decision-making by facilitating easy access to information



Fostered user collaboration for inter and intra-department work to result in improved customer service



Achieved platform standardization with a centralized repository for all the different departments across multiple countries

Summing Up

By choosing to implement Newgen's DMS, the customer could seamlessly manage the entire lifecycle of documents through storage, record retention, and retrieval. It provided users with valuable insights easy access to records, and significantly reduced the risk of data breaches. The solution offered the customer numerous features to achieve efficiency, ensure compliance, and improve the overall user experience.

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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