

CASE STUDY: A BANK'S PROCESS TO GO PAPERLESS

COMPANY OVERVIEW

The client is a mid-sized bank based in Minneapolis, Minnesota with 4 branches across the state.

COMPANY PROFILE

Location	Minneapolis, MN
Employees	200+
Industry	Financial
Competitor	N/A
Solutions	Sales Cloud, Nintex Drawloop, DocuSign, Visual Flow
Go Live Date	9/1/18



CHALLENGE

The client had a very manual process with handling paper documents that were manually completed by hand or with fillable PDF's. All documents were either emailed or hand delivered to customers for signature and then scanned and uploaded to a document repository.

SOLUTION

- Implemented a series of complex visual flows to gather data through user guided input screens for 80 different documents.
- Allowed users to do multiple document types and group them in one send to the client..
- Use of Nintex, Drawloop to generate the documents integrated with DocuSign for e-Signature.
- Documents are tagged with QR Code to allow banking employees to upload to a document repository with specific tags for search ability.

"We were able to significantly cut the amount of time to generate and send a document, which increased customer satisfaction."

THE RESULTS

Bank members are no longer manually completing documents.

Increased security of signatures and data using DocuSign.

Tracking status of signatures with reminders instead of manually following up with customers