

# SpareBank 1 SR-Bank

## Client Success Story

### SR-Bank Turns a Challenge into an Opportunity to Innovate

Part of the SpareBank 1 Alliance, SpareBank 1 SR-Bank is Norway's largest regional bank and the second largest Norwegian-owned bank. They offer a full range of financial services within areas such as loans, savings, advice, insurance, and pensions for personal and corporate customers.

#### Challenge

A couple years ago, SR-Bank started an intensive evaluation of suitable document generation solutions that would enable them to generate large, template-based agreements for both corporate and retail banking customers. The organization was using Microsoft Dynamics CRM; they required all document creation and output management tasks to be performed from the Microsoft platform.

The corporate division, the primary user of the document system, was satisfied with the functionality of the chosen solution but the business support division, which was in charge of the continuous development and technical support, found it to be somewhat cumbersome and labor-intensive, especially when an internal user required a change to an existing template or document flow. It was decided that the system would be replaced.

As a high priority, SR-Bank and their appointed technical CRM advisors from Microsoft and Avanade – a global joint venture enterprise between Microsoft and Accenture – began their search

#### CLIENT

SR-Bank

#### PARTNER

Experlogix

#### PRODUCTS

Microsoft Dynamics 365

#### BENEFITS

- Streamlined document processes
- Reduced dependence on IT resources
- Improved document consistency

#### COUNTRY

Norway

for a reputable software vendor with an easy-to-use document generation add-in for Microsoft Dynamics CRM. All parties involved agreed that Experlogix Document Automation was the best solution to help SR-Bank empower their business users and reduce IT dependence.

## Solution

### User-Friendly Features to Optimize Processes

Experlogix Document Automation provided SR-Bank with a complete, end-to-end solution streamlining and automating document generation processes – creation, management, approval, delivery and storage – directly from the Microsoft Dynamics CRM environment.

Dynamic template design leveraging advanced capabilities for data integration, personalization, and configurable business rules can be easily done using the Experlogix Document Automation Template Builder add-in for Microsoft Word. The solution's intuitive user interface allows for easy access and use of powerful functionalities and customizable options for building and deploying document flows that support any internal business processes. These logic-based customizations can be made by SR-Bank business process owners, alleviating the pressure on the IT business support team.

Through the Experlogix Document Automation for Dynamics implementation, SR-Bank optimized their document generation processes while remaining compliant with internal best practices. Highly personalized, relevant customer-facing agreements are created, generated and delivered in just a few clicks from Microsoft Dynamics CRM. E-signatures can quickly be captured from customers through a pre-built integration with DocuSign; then final agreement documents are automatically stored in the required secure Microsoft SharePoint location for efficient management.



## Result

The corporate, retail and business support divisions of SR-Bank immediately benefited from Experlogix Document Automation for Microsoft Dynamics. The newly implemented solution facilitated the creation of dynamic, data-driven agreement templates and the configuration of automated document flows, streamlined document management, and accelerated document delivery and completion through e-signature. Experlogix Document Automation offered non-technical users across these business divisions an integrated way to efficiently generate consistent agreements that meet both the stringent financial industry regulations and internal compliance requirements.

SR-Bank's optimized and automated document generation processes with Experlogix Document Automation for Dynamics raised the bar in terms of internal best practices and return on investment. In addition to bringing many new and robust capabilities native to Experlogix Document Automation, the total cost of ownership of this solution rapidly proved to be more beneficial than the previous document system.

Once Experlogix Document Automation for Microsoft Dynamics was launched, several other possibilities to use the document generation solution throughout the organization were identified. SR-Bank recommends Experlogix Document Automation.

Want to learn more?  
Speak with one of our experts.

Get Started

"It is an easy, intuitive document generation tool that quickly does the job each time for each customer, at the click of a button."

**Silje Eriksen**  
Bølla Leader of System Management



SpareBank **1**

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