

## Customer Use Case

# CCM GATEWAY FOR ALFRESCO

## Customer Communications Management for Financial Services

### Overview

Financial institutions need to store and manage millions of documents such as statements, letters, quotations, reports, security notifications, reminders, checks, remittance advices and other internal and customer communications. This material is typically generated by core banking systems, is highly regulated, and needs to be archived for many years.

### Challenge

A large financial services organization provided customer communications archiving and e-presentment services to their geographically distributed organization using a mainframe based archiving system.

As part of a business-wide effort to reduce costs and improve customer service, they decided to replace their archive and implement CrawfordTech CCM Gateway.

### Solution

Crawford Technologies' CCM Gateway was selected as the print stream transformation, indexing and ingestion engine to pump mainframe reports into the new archive. Crawford Tech permits AFP print streams to be stored natively for compliance purposes and provides efficient conversion into PDF and PDF/A on demand when documents are retrieved.

### Results

Customer service agents can easily get redacted documents when needed, and the financial institution's customers can access their information via a secure web portal. The solution not only supports short-term report archiving requirements, but will also support longer term application decommissioning and structured data archiving requirements. The financial institution saves money because reports, statements, and other documents no longer need to be printed and distributed, but instead can be digitized and provided to consumers via internal portals and web sites.