



**TAB BANK  
DEPLOYS THESIS TO IMPROVE EFFICIENCY  
ACROSS THE BUSINESS**



TAB bank has been providing business finance solutions to clients across America since 1998. Their aim is to provide businesses with the security of a bank coupled with the flexibility of a finance company to reach their business goals.

TAB Bank was one of the first commercial users of CUBA Platform, a Java based framework created by Haulmont Technology. They began using CUBA in April 2016 and initially approached the team to discuss building something bespoke within CUBA to improve document management and facilitate streamlined workflows. The CUBA team explained that Haulmont also develops an ECM platform, THESIS and much of the functionality within THESIS would meet their needs.



## ■ Challenge

The business was looking for a framework which would provide typical out of the box enterprise features and CUBA fit their requirements. Prior to implementing THESIS, they were using disparate file storage systems for different departments and processes. Although all files were stored securely and accessible across the organisation, TAB Bank felt that centralising this storage would make it easier to

manage tasks and processes involving staff in different departments and/or offices. Due to the number of systems being used, several processes involved manual work for staff which could be automated with the right technology to reduce unproductive time and the probability of human errors being made during busy periods.



## ■ Solution & Results

TAB Bank's stakeholders were introduced to the THESIS team and explained that they wanted to consolidate their technology to improve workflow and business processes. Haulmont recommended merging files from the various storage systems in place into THESIS as this would simplify document management across the organisation and give all staff better visibility across the business.

Other useful features in THESIS were highlighted such as process and approvals management, meetings and agenda setting, task management and reporting functions.

This enabled TAB Bank to improve the way in which processes are managed across several different departments and the business decided to trial process management within THESIS including 'Dispute Tracking'.

TAB Bank have used THESIS to streamline the dispute process from the initial point of notification through to completion and resolution of the dispute. Using THESIS, they have been able to build workflows to manage the entire lifecycle of a dispute through automated emails and notifications. Although there is still a lot of manual work to complete in investigating a dispute, each step of the process can be tracked and monitored much more effectively with THESIS.



## Angela Hunter,

Account Support Manager, remarked:

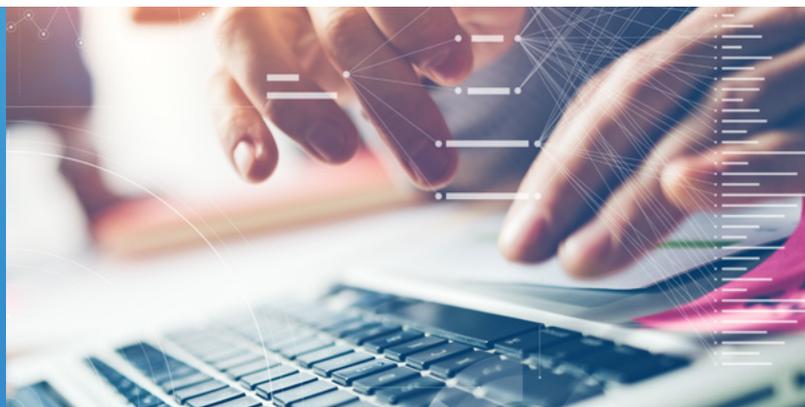
*"There is manual and investigative work to complete when resolving a dispute but using THESIS means we can document each step of the process and review each action that has been taken. This has saved time but the biggest benefit has been in reducing touch points where there is potential for human error."*

A department responsible for following up on equipment loans has also begun using THESIS to manage their tasks. This department has three staff who have a large volume of loans to follow up on – approximately 400 tasks every three days. THESIS has revolutionised their day-to-day work as the platform can easily track progress and reduce admin time. Since implementing THESIS, the team has saved on average 12 hours per week.

## Ashleigh Della Lucia,

Specialist Team Lead, noted:

*"THESIS has been fantastic for our team and we are now up-to-date with minimal stress. The system is very easy to use and we have been able to build in everything we wanted including automated emails, specific fields and notifications."*



Staff at TAB Bank have been very positive about THESIS, noting the user-friendly interface which makes the platform very easy to navigate. As documents are stored in one central location rather than three or four different file storage systems, they are easier to find and workflows have been simplified.

Senior staff at TAB Bank are delighted with the processes that have been automated in THESIS so far and are continuing to migrate different parts of the business into THESIS.

