



TAB Bank partners with THESIS to streamline document and task management across the business

Key Facts



TAB Bank launched their business finance solutions across America in 1998



Partnered with Haulmont Technology in 2016; now use CUBA Platform and THESIS ECM



Implemented THESIS to centralise document storage by replacing several disparate legacy systems

The Background

TAB Bank began offering business finance solutions to clients across America in 1998 with the aim of providing the security of a bank coupled with the flexibility of a finance company. In April 2016, the company became one of the first commercial users of CUBA Platform which is a Java based framework created by Haulmont Technology.

Shortly after this, TAB Bank asked their Haulmont technical team to help them streamline document management and improve workflow processes within the business. It was at this point that TAB Bank began conversations with Haulmont's THESIS department. THESIS is an ECM platform designed specifically to help organisations manage documents, tasks and workflow more efficiently.

Challenges & Goals

In 2016, TAB Bank was using disparate file storage systems and processes across various different departments. Although files were being stored compliantly and were accessible across the organisation, staff felt that

centralising this storage would make it easier for colleagues working across different departments and offices to share information and collaborate.

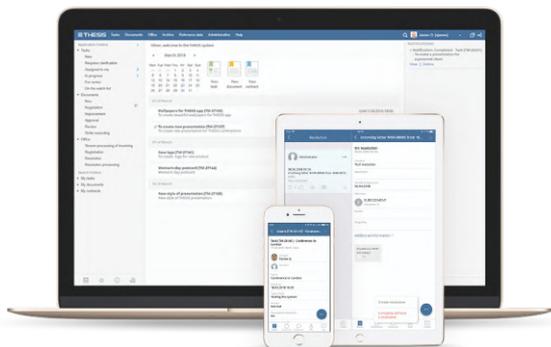
Additionally, the use of several systems had led to many processes involving manual work for staff. With the right technology, these processes could be automated to reduce admin time and ease workload pressure for staff.

Solution & Results

THESIS specialists recommended consolidating all files from the various legacy storage systems in operation into THESIS. This would allow TAB Bank's management to simplify document storage across the entire organisation and improve visibility of the wider business for staff.

The THESIS team also noted that the workflow management features within the platform could be used to support TAB Bank. As a result, TAB Bank piloted process management functionalities within a test department responsible for managing and tracking disputes.

THESIS was implemented to streamline the dispute process from the initial point of notification through to completion and resolution of the dispute. TAB Bank have been able to use THESIS to build workflows to manage the entire lifecycle of a dispute through automated emails and notifications. This has helped staff as it reduces admin time but it also helps the end user to stay informed throughout the process. There is still manual work to be completed during an investigation but using THESIS means it much easier for staff to track and monitor each step of the process.



Angela Hunter, Account Support Manager within the dispute department 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. ”

THESIS is now also used in a department responsible for following up on equipment loans. 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.