Pre-Study for a Swiss Bank

iseo LABS

BANK

SUCCESS STORY ANONYMIZED

CUSTOMER

Industry: Financial Institution

Location: Switzerland

Employees: ~300 in 20 branches

RESULTS

- Finalized Requirement List

- Vendor-specific collection of ECM architecture & technology information

- Ranked short list of 10 potential ECM vendors / ECM solutions

> "One is overwhelmed by the amount of information surrounding us every day. When there is a need to find accurate and up to date information related to ECM systems, products and vendors, the number of reliable technical resources becomes very limited. Only years of experience implementing ECM projects will help you to navigate that information desert.

Joachim Freitag,
Partner IseoLabs

CUSTOMER BRIEF

Industry: Financial Institution

Location: Switzerland

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CURRENT SITUATION

- Existing Document Management Solution does not meet requirements anymore, especially from an architectural standpoint (interfaces/deployment/scaling)

- Changes to existing DMS are costly

CUSTOMER GOAL

01 Align ECM systems to current and future company IT strategy;

02 Integrate ECM into future proven IT architecture and innovative software design methods based on Micro Services platform (Service Layer Architecture);

03 Keep existing content in strategic Storage platform.

ECM MARKET RESEARCH

- Conduct requirement analysis;
- Initiate anonymous market research;
- Select and assess potential ECM solutions.

PROJECT:
ECM PRE-STUDY &
MARKET RESEARCH

01 Collect and prioritize functional and non-functional requirements together with the project team

02 Facilitate IseoLabs market experience for an anonymous ECM market analysis / vendor selection based on requirements

- Keep existing content storage platform incl. retention management;
- Future-proof REST-API / Micro Services Architecture;
- Microsoft Office 365 integration capabilities;
- Automated intelligent Metadata Management / Classification for powerful document search (full text, metadata, hybrid);
- ECM Service integration into existing Core Banking Systems used by the customer;
- System performance to manage 200.000 new documents per day and 50+ Mio documents in total;
- Country-specific requirements.

03 Provide management decision template with shortlist of relevant ECM Vendors

OUTCOME

PROJECT DELIVERABLES

- Finalized Requirement List

- Vendor-specific collection of ECM architecture & technology information

- Ranked short list of 10 potential ECM vendors / ECM solutions

NEXT STEPS

- **Vendor request & assessment planned for 2023**

  — Proof of concept
    Define Use cases & KPIs
  — Define ECM Architecture & Migration approach

- **With IseoLabs "Time2Run" approach**

  — No information loss from Pre-Study
  — Immediate start into Vendor assessment
  — Save time & money until GoLive

SUMMARY

✓ IseoLabs as trusted ECM advisor had access to customer requirements and insight in future challenges and planning

✓ Vendor assessment based on technical understanding of available products & solutions

✓ Customer guidance with market proven ECM competence and expertise out of the last 25+ years IseoLabs experience

✓ Provide insight in the complex & Marketing-driven ECM market with many products & solutions