

CASE STUDY :

CAISSE DES DÉPÔTS TRANSFORMS ITS CUSTOMER COMMUNICATION CAPABILITY WITH SEFAS

In 2010 Sefas and Caisse des Dépôts (CDC) implemented a solution to consolidate its composition and design tools and improve CDC's capabilities in responding to customer requests for information.

The Sefas solution has enabled CDC to improve internal process through improvements across its entire document management system and to make significant savings.

"Over the past three years, Sefas has helped CDC to save more than a million euros", says Ludovic Mansuy, head of CDC's in-house DTP Services Centre.

Caisse des Dépôts is publicly owned and is one of France's largest financial institutions providing services in banking, fund management, pensions and investments. CDC generates more than 2 million pages every month as part of its stakeholder communication requirements. The majority of this production is accounted for by the 25 million pages generated automatically every year from its business applications, but there are also significant volumes of customer-specific one-off transactional letters that are also generated.

Ludovic Mansuy explains *"We needed a solution that would be capable of managing both types of document printing"*.

CDC's primary challenge involved improving the flexibility of its composition capabilities and enabling better access to the design functions. "Previously, development was undertaken within the business applications themselves", continues Ludovic Mansuy. *"That process raised quite a few questions over the time taken to make changes particularly where critical changes involved modifying legal conditions, such as a loan offer"*.

WITH A SAVINGS OF OVER €1,000,000 IN INFRASTRUCTURE AND MAILING COSTS, THE SEFAS SOLUTION CAN BE USED BY BOTH EXPERT AND BUSINESS USERS.

A further complication was the variety and complexity of CDC's existing composition and design technologies.

In 2006 an organisational brand change triggered the launch of a project to review the whole design and modification process. Its goal was clear: *"The primary objective was to put in place a long-term plan for the design infrastructure, built around a common base and a new organisational structure that would include CDC business owners and the IT teams"*, explains Ludovic Mansuy.

This crucial capability would not be outsourced. Instead, CDC opted to create an in-house DTP (Desktop Publishing) Services Centre that would manage the organisation's design and composition requirements through a solution technology that would need to be intuitive and flexible enough to benefit all parts of the business.

GROUPE



ESTABLISHED IN 1816, THE CAISSE DES DÉPÔTS IS A PUBLIC-SECTOR FINANCE INSTITUTION RESPONSIBLE FOR DELIVERING GENERAL INTEREST MISSIONS, SUCH AS PROVIDING FUNDING FOR SOCIAL HOUSING AND MANAGING PUBLIC-SECTOR SAVINGS AND PENSION FUNDS, AS WELL AS FUNDS INVESTED BY THE LEGAL PROFESSION (ESPECIALLY NOTARIES). CONSISTENTLY RATED AAA BY FINANCIAL RATINGS AGENCIES, THE CDC HAS ON MANY OCCASIONS BEEN REFERRED TO AS THE “SAFEST BANK IN THE WORLD”.

CUSTOMER BACKGROUND

STRATEGIC VISIBILITY

The solution adopted would have to be able to work across all business repositories, but also be open and modular enough to allow the integration of new DTP services without needing to adapt the applications. In its three years of operation, Sefas has totally fulfilled that specification.

“The user-friendliness of the graphical interface was a decisive factor in selecting the Sefas solution”, emphasises Ludovic Mansuy. “Designer has given useful visibility of our DTP services, as well as the ability to manage them strategically”, continues Ludovic Mansuy.

Creating a master plan for the underlying DTP system enabled the repository of document templates to be rationalised: from more than 1,000 templates in 2005,

to less than 600 on a like-for-like business basis. Since then, new functions such as legal archiving, e-mail, online delivery and registered post management have also been introduced. This has meant that the majority of the potential savings identified at the outset have already been realised.

“CDC was able to rely totally on the responsiveness and expertise of Sefas at every stage of the implementation process”, says a delighted Ludovic Mansuy.

Sefas and CDC were in constant contact and discussion throughout the project. The close relationship enabled CDC not only to implement the solution within their timescales, but also to look to the future. The successful implementation of Designer had been accompanied by an awareness of the strategic importance of customer communication and document production.

“We already have a vision of where we want to be in five years’ time”, continues the Head of the CDC DTP Services Centre. “No matter what form it takes, whether printed or digital, the document is the fundamental basis of our relationship with our 12 million customers, so having complete control over document production means having complete control over one of the key elements of the customer relationship”, continues Ludovic Mansuy.

He also takes a similar view of forthcoming regulatory obligations - particularly the introduction of the tighter security rules - and the new expectations regarding traceability. “These expectations are absolutely consistent with the role of CDC as a trusted financial organisation. Our functional architecture already implements these safeguards through interfaces with our digital trust platform. The Sefas solution is a key element in CDC extending their interoperability with other public bodies”, concludes Ludovic Mansuy.

It’s a deadline that the CDC sees approaching fast.

Contact: Sefas Innovation Ltd - Whitefriars - Lewins Mead - Bristol - BS1 2NT

T: +44 (0) 117 906 9920 E: contactuk@sefas.com

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