



La Poste Financial Services CH99BIS Account adjustment system

“Handling nonstandard events using workflow has been clearly identified as an optimum progress area in terms of productivity and quality of service. We find the W4 solution ideal for ensuring service remains effective in a geographically widespread organization.”

Pascal Magnier, Project

Solution Overview

Sector

Banking - Finance

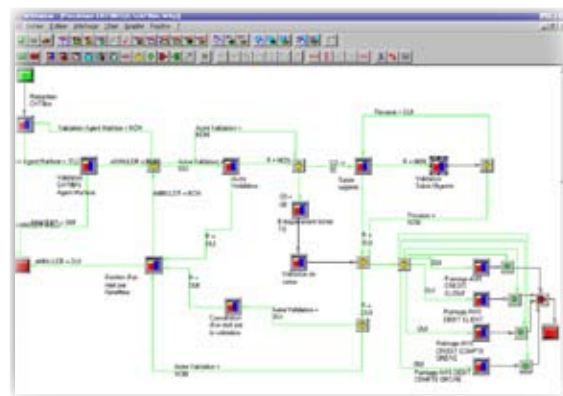
Project goals

- > Optimize the way nonstandard events are handled
 - over 1000 participants
 - spread over forty units on four sites (Paris, Orleans, Nantes, Bordeaux)
 - over 300 processes generated per day
- > Increase internal cooperation
 - decentralization slows down collaborative working between units
 - set down the process formally and harmonize management procedures
- > Improve competitiveness and performance
 - increase productivity
 - ensure full traceability
 - maintain full control of complex processes
 - come up with a flexible application
 - reduce coding errors and misdirections

Results

- > Payback in less than 2 years
- > Productivity gains
 - Over €150K savings per year
 - Total elimination of the paper-based process
 - elimination of physical transfers between departments
 - reduced numbers of data entry operations and misdirections
 - An average 4 minutes working time saved per process
- > Faster response times
 - processing procedure times halved
- > Acceptance of new working methods
 - project well received, which will help extension to other projects

The French Post Office's Financial Services division has chosen the W4 software provider for the optimization of its system for processing nonstandard events, affecting 1000 employees in the Paris and Center region.



Setting up an innovative project

In order to strengthen its European market position, La Poste is aiming to modernize its offer. It intends to improve its quality of service without any loss of cost effectiveness.

Keeping costs under control was a key factor in this project, and the decision was therefore made to focus this project initially on a model procedure for account adjustment operations (debit/credit notifications, entry and execution of tutor instructions, provision for unpaid checks, etc.). La Poste named this project CH99BIS.



contact@w4.eu - www.w4.eu



> La Poste Financial Services : CH79BIS Account adjustment system

Events handled by complex traditional processes

Handling nonstandard events is an everyday operation for Financial Services. It involves strict processes that must follow defined procedures down to the last letter. And it must do so while keeping an eye on banking security and accreditation.

Traditional paper-based technologies entail relatively long processing times due to the number of times the paperwork must be passed around. This harms service quality and leads to complaints from customers that are not always easy to answer, there being a lack of appropriate tools for monitoring the progress of each file through its various processing phases.

W4 : an Innovative Solution

In late 1996, initial enquiries were sent out to obtain a preliminary idea of the capabilities and costs of the various workflow solutions on the market.

Once it had rolled out its intranet platform, La Poste invited more specific tenders in November, 1997 from a narrower range of suppliers.

The selected product had to be able to meet the following constraints:

- interoperability of the workflow solution with the other applications used by La Poste
- scalability to enable support for thousands of participants and millions of process instances per year

The joint proposal from W4 and the Sema group was selected in 1999, both for its cost which fell within the budget and for its feature and technical richness.

CH79BIS specifics

The project was commenced in June, 1999. The prototyping phase was set up directly with potential users. This led to a prototype being brought out within two months, followed by two months further development and verification/approval. Over the next six months, the system was rolled out to 900 participants spread across 40 units on the four sites using La Poste's intranet.

The CH79BIS procedure is a critical application requiring strict application of internal rules, including stringent security requirements.

Each operation goes through various validation levels within different units depending on its operation code and on the accounts involved.

This implies being able to represent the different structures and roles of each unit as well as business rules governing the assignment of activities to units and roles.

For the specialists in organizational methods who participated in the project, the main consequences were:

- standardization of control levels and rules between the two production centers, coupled with strict application of internal regulations
- flexibility of the workflow application in the support of organizational modifications
- improved traceability compared with previous, paper-dependent processes

This was the spirit in which the project was successfully implemented.

Payback achieved in 2 years

The expected improvements in service quality were attained. Urgent operations could now be dealt with on the same day they were initialized, in many cases in less than an hour.

Furthermore, the CH79BIS application caused a drop in the number of errors when defining operations and the elimination of misdirections to the wrong department when it came to the next step in the process.

About La Poste Financial Services

La Poste has become one of Europe's leading service providers. It operates in three major fields, one of which is Financial Services, in which it is one of France's biggest enterprises. La Poste Financial Services is assisted by 24 regional centers including Ile-de-France (Paris region) Financial Services.

Ile-de-France Financial Services

La Poste Ile-de-France's Financial Services Center runs several sites in Paris, Orleans, Nantes, and Bordeaux and accounts for roughly a quarter of La Poste's overall financial business.

