

# Transforming complaints and requests processes

**Industry**

Banking

**Country**

Hungary

The application we created was addressed for the department of complaints and requests for residential users. With more than 50 workflows, some with more than 100 steps in the automated workflow for processes such as complaints, approval, compliance, and back-office banking processes, the company saved hundreds of hours of employee work, data entry tasks were eliminated and the back-office functions are now more transparent.

## Unique Features

**Paper-less process**

Automated generating documents and e-signature

**13 different systems connected**

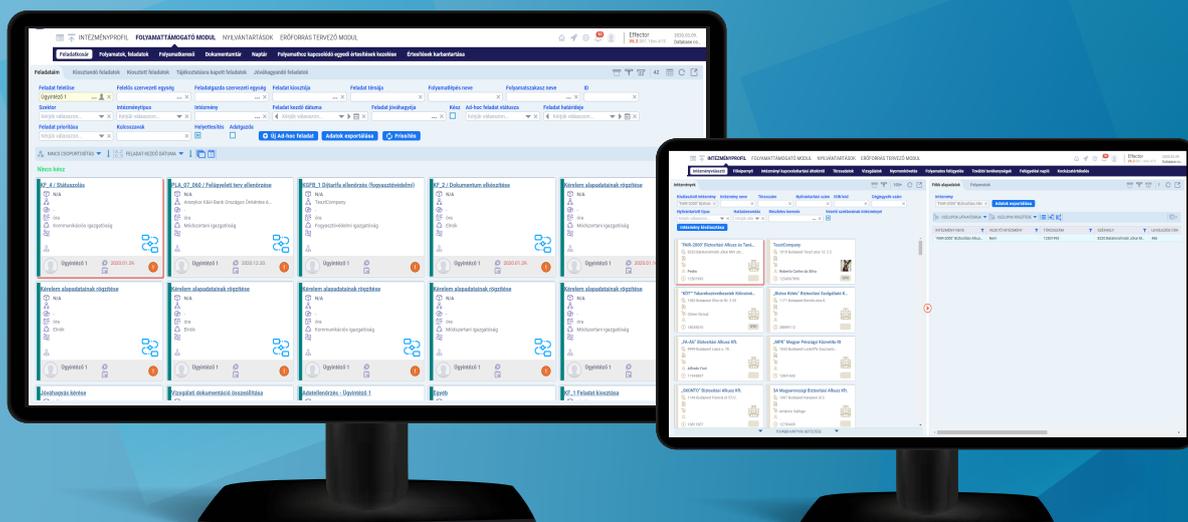
SharePoint, Outlook, AD, client internal systems.

**100 steps workflows**

Including sub-processes for taking fast decisions, delegations.

**Faster Process**

The time for processing and resolving the requests reduced significantly.



# Company

Established almost 100 years ago, our customer is an important bank in Hungary, a state-owned financial institute, part of European System of Central Banks.

## Key takeaways



Improving client experience offering a paper-less process for complaints and requests.



Minimize manual reporting and improve data accuracy, with a faster and more transparent process flow.



Reduce the time of processing and resolving the requests from 30 days, to less than 1 week.



Fast integrations with back-office key systems and supporting the legally controlled complaints process.



Fast implementation of fluent workflow with more than 100 steps like different delegations, sub-processes for taking fast decisions, e-signature and generating documents.



50+ Automated workflows implemented.

## Pain Points

The operation was heavily regulated, including SLA limits of 30 days for different requests. The client had many manual and people-intensive processes to deal with incoming tasks in 4 different channels: email, phone, snail-mail, and a personal customer center. All these requests had to be processed and resolved within 30 days (depending on the process, within a mandatory deadline), and the department had to create monthly reports based on their activities and results. There were different processes for different channels such as email, snail-mail, and phone, so it was difficult for employees to support, or stand-in for each other. Only a basic IT infrastructure supported the tasks (Excel and Access), and a great deal of manual work had to be done every day.

Monthly reporting is mandatory and creating it took one senior employee almost a week. Each request has to be prioritized and resolved within 30 days, or other deadlines set by law.

# Why low-code

The Institute has an ongoing IT modernization roadmap, and there was a clear expectation towards the software development vendor as to how they should develop and deploy it within their IT technology strategy.

There was an open software development tender where software development companies could bid with their solution(s).

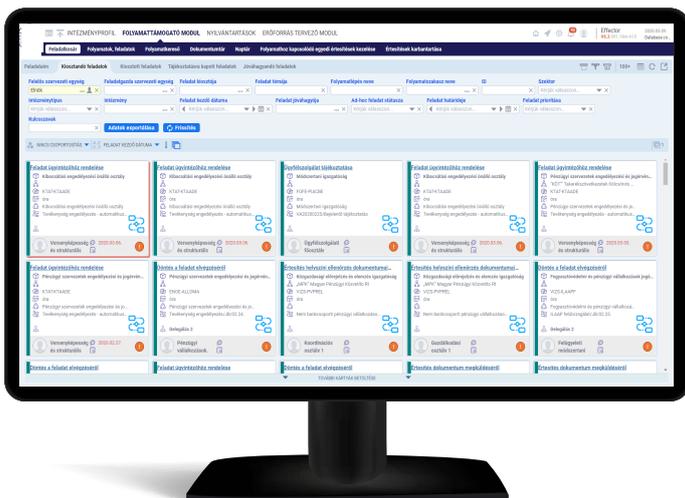
The low-code technology was chosen as the best solution because of the speed in delivery and testing and also, because employees with less IT knowledge could use and customize the app to fit their needs. Potential for changes being quicker to update in the future.

# Why Oriana

The internal IT department created a technical description of the goals and expectations as an initial brief, and Oriana had to then deliver a feasibility plan. Only a few interactions between the client and the Oriana team were allowed during the selection process, due to the limitations of the open tender process. Oriana was chosen because of the [platform approach] technology and its development model.

The department had very strong and professional experience in managing customer service, but lacked knowledge in this area with IT capabilities, applications, and modern workflows.

# What Oriana delivered



The institute had a strong IT back-office with all the key systems (document warehouse, user authentication, different databases, etc.) and the new applications and workflows had to integrate with all of them, as well as supporting the tightly regulated complaints process.

During the development project, **Oriana had to link 13 different systems like SharePoint, Outlook, AD and the client internal system to create about 50 workflows, with an average of 30 steps.**

Some of the workflows about supervision, continuous monitoring could have more than 100 steps. The whole environment was really sophisticated and during the project many uncontrolled areas were identified and fixed.

The project consisted of planning, development, smoke testing, user acceptance testing, and a trial period with extensive support and user training. Although the development process was a few months longer than anticipated - due to client-driven changes in the scope of the project - this ability to fine-tune and add value was greatly welcomed.

## The Results

Experts within the department noted a huge increase in efficiency. Previous human-based workflows were digitized, and previously paper-based work was transformed into digital activity. The whole process flow became more transparent and faster, with fewer people doing more tasks in a structured way. The new application is able to manage around 30.000 cases per year and this number is increasing.

Oriana trained the key personnel to support the onboarding of the new platform, and this went smoothly. The layout of the system is very intuitive and understandable so that it can be used after only a few hours of familiarization.

During the development phase, Oriana developed a close relationship with the future users and created many different layouts and UI skins to enable them to test the best version. As a result, users feel ownership of the applications, which support their activities at every level.

The current application needs only minimal support from Oriana. If it happens that workflows, back-office systems or SLA changes need to be fine-tuned - for example, because of new regulations or practices - Oriana can be called into effect customization within very short time frames.

## Conclusion

Effector by Oriana proved again its flexibility and that it allows the developers to create new automated processes easily. Also, whenever the company needs improvements, the citizen developers can improve the workflows fast, without the need of coding knowledge. In this customer story, Effector was the solution that offered a much better user experience, but also created an easier work process for the service representatives.