Case Study 2: Financial Institution
FROM MANUAL PROCESSES TO PAPERLESS AUTOMATION WITH ONLINE GIFT CARD DESIGN AND ORDERING

PROFILE

Financial Institution #1 is a top transaction organization in the US. The company provides a comprehensive line of banking, broker-age, insurance, investment, mortgage, trust and payment services products to consumers, businesses and institutions, providing commercial and personal insurance and financial services.

CUSTOMER CHALLENGES

- Registered 1 million plus merchants placing unlimited orders
- Former processes did not allow for online card design
- Needed a secure, easy to use, design and management solution

SOLUTION

InVision Data built Financial Institution an online management site that allowed clients and the general public to design gift cards and place orders. The solution allows the company to manage and oversee orders that are then forwarded to the supplier for fulfillment of the orders. The site also allows clients to get started with their order very quickly, with templates and allows for recurring orders.

BUSINESS RESULTS

- Financial Institution is able to organize and process volume of orders
- Convenient, self-service software application
- Powerful & sophisticated functionality

" We looked at several different companies during our search for a web based utility and dashboard for our clients and employees. InVision Data was a perfect fit with their innovative approach and creativity. Our new process is stream-lined and headache free. "

-Senior *Director, Marketing*

In 2007, Financial Institution was looking for a cost-effective, easy-to-use technology solution to tackle online design and order mangement for the 50,000+ orders processed per year. They also wanted to penetrate further into their 1 million plus merchant base.   Up to that point, their design and order process did not allow online card design. They needed an online design tool and order site that would allow the client to get started quickly and streamline their order and management process.

Financial Institution #1 compared many online applications, but InVision Data stood out because of its ease of use and ability to automate the entire design and order experience. "We enhanced our clients' experience with our value added product. Our solution increased our client retention substantialy, we noticed that in our bottom line," says the Director of Special Services.

InVision Data helped Financial Institution go online with their design and order management solution very quickly, getting them started with templates, program and housing features that make recurring orders easy to process.

Allowing each client to process their orders when they want, design the value added product to suit their needs and establish their own brand, increased client retention and solidly penetrated their merchant base.