"We have created a truly paperless office in a very short space of time and within budget. Instead of firefighting to remedy processes that have broken down at some point, we now have very strong controls over our processes. Everything is slicker and quicker."

Paul Phillips, Operations Project and Process Manager, Pitney Bowes FSE

PITNEY BOWES FINANCIAL SOLUTIONS EUROPE (PBFSE)
Financial solutions provider that handles financing arrangements for any business equipment sold by the parent company, Pitney Bowes.

Pitney Bowes Speeds Communication with TIBCO's BPM Software

Industry: **Financial Services**
Geography: **Europe**

Deployment Summary

- PBFSE automates lease management processes using TIBCO's BPM software.
- The solution provides integration to the legacy lease management system, Microsoft Word, and Crystal Reports.
- Approximately 5,000 customers are live on the system each month with approximately 7,000 letters sent out monthly.

Benefits

- TIBCO's BPM software enables fast and responsive internal business processes and a paperless office.
- The solution decreases the time needed by the relevant manager or department to approve letters from two days to real time and makes the company more self-sufficient to change processes when necessary.
- Fast processes increase employee productivity and leave more time for outbound calls.
- The solution provides management with better customer visibility and enables improved process analysis.

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Based in the UK, Pitney Bowes Financial Solutions Europe (PBFSE) handles the financing arrangements for any equipment the parent company sells to businesses in 11 countries across Europe. The majority of such sales involve leasing contracts, and PBFSE is responsible for the full range of activities associated with these contracts – from new business to credit checking, customer services, and collections processing.

"There has been significant consolidation within our industry, so we now face only a handful of major players. That means we need to keep on our toes. My role is to find better, more efficient ways for us to operate in order to improve customer satisfaction, which is the key to our business success," says Paul Phillips, operations project and process manager for PBFSE.

While there are multiple IT systems in use companywide, the leasing operations primarily relies on a legacy lease management system that was developed in COBOL in the mid-1980s and runs on an Oracle 7 database. This application is highly tuned to the PBFSE business environment, but inevitably does not have all the facilities that an application based on more modern technology can offer. In particular, large parts of some processes were paper-based, leading to some inefficiencies and delays.

"For example, if a customer didn't pay for any reason, that fact would be noted on a report from the system. Managers would then need to print that report, look at the cases in no particular order, and decide what to do," Phillips says. "In some instances, that meant there was little control over processes, and processes became broken – paperwork delays and holds became endemic. It was also possible for staff to cherry-pick which cases they tackled, sometimes going for the ones that looked the most straightforward rather than concentrating on the most urgent," he adds.

Pitney Bowes Selects TIBCO's BPM Software

PBFSE's initial goal was to select a new lease management system that had BPM facilities built in. However, the company's eventual choice will not be available for another five years, and in the meantime the requirement to improve process efficiencies remained. Given this background, PBFSE began

the search for a BPM solution that could be added to the existing lease management system. After evaluating about a dozen suppliers, PBFSE chose TIBCO's BPM software as the one that most closely matched its selection criteria.

These criteria included the need for a proven application coupled with in-house technical consultancy rather than third-party assistance. The supplier had to be financially stable and able to support the product over the long term.

PBFSE also wanted an application that was both flexible and easy to use. TIBCO's visual user interface scored well in this category because it would make it easier for staff to migrate to the new system. It also had a good design tool, simplifying the process of altering screens and layouts to match specific needs without having to call in specialist assistance.

The first phase of the implementation, which involved 20 users, was delivered on time and under budget within four months. This implementation included integration with the legacy lease management system, Microsoft Word, and Crystal Reports. The initial phase focused on the UK collections process, which historically was dependent on paper reports and had multiple steps involving hand-offs or form filling.

"What we wanted was a robust yet rapid implementation, which would help demonstrate what BPM could do for us and bring people on board with the whole concept. We were looking for a big win that would form the platform for expanding our efforts," Phillips says.

By adopting TIBCO's BPM software, PBFSE was able to leave the leasing management system exactly as it was while adding a layer of automation to the processes involved. Everything that had previously been recorded on paper is now available on screen.

TIBCO Helps Pitney Bowes Achieve a Paperless Office

TIBCO's BPM software enables cases to be logged and put into a work queue. They can be selected and assigned to staff according to agreed guidelines, so that the most urgent or oldest cases are dealt with first. Any letters, such as the standard arrears letter, are automatically generated via Word, while sign-offs are also handled electronically. Previously, letters could spend two days in the internal post being passed between sites for signing. There is also a full audit trail for all processes.

"The most obvious benefit is that we now have a paperless office. All of the letters commonly used, such as default or termination letters, are held automatically in the system, as are all customer addresses. That means people can't key in the wrong information or address, so we are now confident in the quality of our letters, which is important for collection," Phillips says. Phillips has also been impressed with how easy it has been for staff to use the new design tools themselves. "There have been significant modifications to the application since it went live. This was always the plan, because the company wanted to let users see what was possible and then refine it themselves."

"We are now 100 percent self-sufficient when it comes to making changes in any of the processes, which is important to us. We obviously don't handle the more complex IT requirements, such as the integration to the leasing management system, but being able to make changes to the application without having to call in the experts is invaluable," Phillips says

TIBCO Enables Efficient and Swift Processes

Phillips estimates that approximately 5,000 customers are live on the system each month, and that about 7,000 letters are sent out monthly. TIBCO's BPM software enables these letters to be handled more efficiently and swiftly, so that staff has more time to spend on outbound calls and managers have a much better picture of what is happening with any customer at any time. Management information in areas such as user productivity and process analysis is greatly improved.

"Part of our approach was to test out the application in a specific area of our business to see whether it delivered what it promised. We were very impressed by the flexibility of TIBCO's BPM software and the fact it is so easy to use. We also found TIBCO's approach to be highly committed and professional, and they developed an excellent working relationship with us," Phillips says. For the future, PBFSE plans to roll out the solution to other areas of its business, most notably customer services – and possibly to other countries where staff are charged with handling similar processes. "We have created a truly paperless office in a very short space of time and within budget. Instead of firefighting to remedy processes that have broken down at some point, we now have very strong controls over our processes. Everything is slicker and quicker," Phillips says.

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