



# Improving the Operational Efficiency of Global Leasing Business Processes

For a company working in a single country, defining a consistent set of business processes in order to maximize productivity is a reasonable task. But for a company with multiple subsidiaries working across multiple countries on multiple continents, it is far more difficult. Defining and managing consistent business processes that meet the business and regulatory needs consistently across the enterprise can be extremely challenging.

This is exactly the challenge one large finance and leasing company faced - improving the operational efficiency of business units across seven countries with a common set of tools.



Centralized records repository that integrates with country specific business systems.



Managing document lifecycle and retention periods based on country rules.



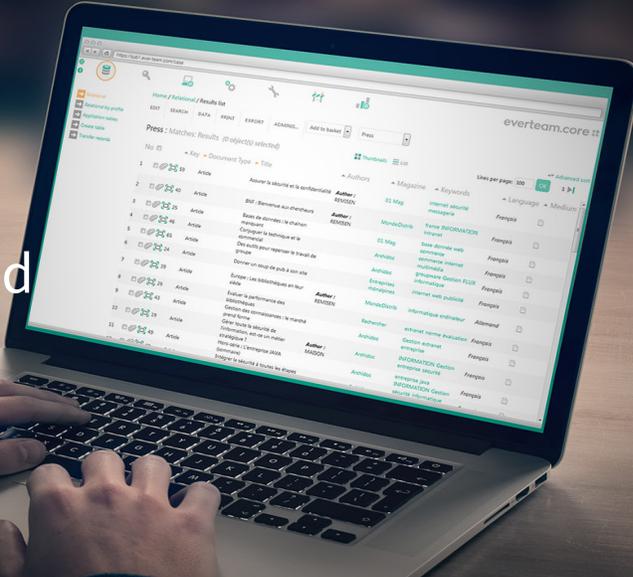
Federated search across all systems.



Centralized governance and traceability.

# Customer

## A Large Enterprise Leasing and Finance Company



### Sector

Financial Services

### Challenges

- No common set of business processes across the organization
- Each country had its own DMS
- No way to search across all systems for information

### Business Benefits

- A centralized view of all company records activity.
- Establishment of common practices for governance and records retention.
- Improved operation efficiency with a seamless set of business processes.
- Better decision making through improved visibility into business records.

## Common Practices, Common Tools

At this financial services company, there was no single defined corporate solution for information governance and records management. The company, which provides finance and leasing solutions globally, wanted to ensure consistency across its business units with a standardized set of information governance practices.

They knew that consistent processes would mean improved productivity, easier monitor and better compliance with regulatory requirements. They also knew that a universal solution to information governance would mean that they could leverage search and analytics capabilities that span all geographies.

The vision for a new system was that it would connect existing applications, ingesting and indexing content into a central repository or, in some cases, indexing content but leaving it in place. It would enable the use of retention rules that are based on universal policies while allowing for local differentiation and regulations, and would allow searching across records wherever they are retained in the organization.

## Improved Visibility and Increased Efficiency

Everteam's application archiving solution enabled MGEN to deliver a cross-functional The company set up a new records management system using Everteam's information governance solutions. This system integrates with existing information systems and a new business process management engine. Through the execution of a variety of business processes, records are automatically classified, indexed and ingested as they are created.

Using Everteam's solution, they can now manage the lifecycle of each record, and apply retention periods specific to each country and business function. It also provides a full audit trail of events using features such as signatures, logging, and traceability.

## Solution

- Everteam Application Archiving
- Everteam Analytics

## Key Capabilities

- Integration of key systems with a central RM system
- Implementation of country and business specific governance and retention policies
- Federated search across all systems

To help users find the right information quickly, the solution uses Everteam's advanced content analytics capabilities, which enables federated searches across all connected applications and the archived records. Predefined searches and analytic models were configured to provide trends and enable in-depth analysis of the contents of documents across the company.

The complete solution establishes, enforces and monitors information governance and records management practices across the company, ensuring consistency while at the same time establishing compliance with the regulatory requirements of each country.

## Why Everteam? Governance, Federation, Search

- The Everteam solution provides extensive governance and auditing capabilities that ensure the repository is secure and all activities against documents are tracked.
- Everteam integrates with a range of third-party applications, supporting both the importing and exporting of information.
- Federated searches are enabled across systems with near real-time indexing and searching.
- Everteam was able to address the complexity of an organization that needs to establish consistent information governance practices while addressing the different records management regulations in different countries.

# everteam

Everteam drives better outcomes for our customers by delivering user-friendly solutions for complex business processes. We connect people, process, and content by automating and streamlining workflows which would otherwise be time-consuming, error-ridden, and non-compliant. Organizations like Axa, Sky Plc, The United Nations, and BNP Paribas rely on Everteam to maximize the efficiency of their enterprise information and process workflows.

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