

Doxim Helps Credit Union Service Provider, League Data, Achieve its Virtual Vision



EXECUTIVE SUMMARY

CUSTOMER

League Data works with three credit union centrals to provide services to 60 credit unions across Atlantic Canada, offering a broad range of innovative financial solutions.

CHALLENGE

To enable its credit union partners to make all documents available electronically, allowing customers and staff to achieve exactly the same online as they can at any branch

SOLUTION

Doxim enabled League Data to provide its CU clients with online access to e-statements, check images and other documents. Members view these documents through the their online banking portal

BENEFIT

Credit Union staff can now provide improved customer service across all branches. Members can access key financial documents, including statements and checks via one central online repository.

THE CUSTOMER

League Data provides services to the three credit union centrals (PEI, New Brunswick and Nova Scotia) that service 60 credit unions across Atlantic Canada. In addition to banking and loan platforms, League Data offers its clients a broad range of innovative financial solutions, including online banking, Customer Relationship Management and ATMs.

THE CHALLENGE

When he talks about his long-term vision, League Data's CEO, Steve Mills, describes a virtual credit union, where both customers and staff can achieve exactly the same online as they can at any branch. By enabling its credit union partners to make all documents available electronically, League Data would help them drive down costs and streamline access to data, whatever the location of the information-seeker.

However, before partnering with Doxim, vision and reality were not aligned, as League Data had no electronic document solutions to offer to its clients, other than an online reporting capability supplied by another vendor.

THE SOLUTION

A MEETING OF MINDS

When Steve met Doxim's President and CEO, Chris Rasmussen, it was clear to him that Doxim's Electronic Content Management (ECM) solutions were a perfect match for League Data's vision of the future. While the existing online reporting vendor was unable to fulfill many of League Data's specifications, or meet the target price point, Doxim demonstrated that it would be an affordable strategic partner —ready and willing to explore new avenues and ideas to help League Data realize its strategic objectives.

"You can have two types of vendor relationship —a transactional relationship, where you buy something and the vendor supplies it, or a partner relationship —where the vendor sees the long-term value of the association, and allows the customer to influence the direction of the product. Whenever we call Doxim, we get a positive response from whomever we phone, from the CEO downwards. Without doubt, we consider our relationship with Doxim to be a strategic partnership."

Scott Lewin, Director of Solutions at League Data

Doxim Case Study

A CAREFULLY COORDINATED ROLLOUT

Realizing a long-term vision requires careful planning, communication and coordination, along with uncompromising attention to detail. It can be tough to align all the players who will influence a successful outcome, and this project was no exception. Core banking providers, online banking portal providers, Doxim and League Data are all involved in delivering services to League Data's clients. And it is essential that all new electronic document solutions introduced are logical, replicable and scalable across all systems, so that every single one of the service provider's credit union clients can take advantage of them if they choose to. Thanks to its alignment with these other industry solution providers, Doxim was able to help League Data navigate a clear implementation path, closely coordinating efforts with each supplier to ensure that they met all objectives.

SEAMLESS INTEGRATION

League Data's implementation of Doxim ECM began with e-statements, and evolved to include report forms, such as T4s and T5RIFs, which are available to credit union members through their online banking portal. To facilitate and streamline document access for credit union staff, Doxim worked closely with the banking system provider, to develop a seamless integration to League Data's banking platform, providing direct access to all member documents residing on the Doxim Archive via a link from the banking system.

Doxim is also helping League Data with the supplier coordination required to integrate a check imaging solution, allowing League Data to offer its credit unions and their members the ability to view individual checks online. The checks are made available through League Data's clearing provider, and uploaded to Doxim daily.

THE FUTURE

ENHANCED STATEMENTS AND SIGNATURE VERIFICATION

League Data's next move is to take advantage of the new capabilities available in the latest version of Doxim's Business Process Manager, enabling the company to offer greatly enhanced statement design and advanced marketing message management to all its credit union clients.

"We've done a lot of customer education to show the value of printed statement suppression, and the math is both solid and compelling, Doxim's enhanced statement design will help bring renewed focus to our e-statement offering, and encourage more customers to consider print suppression. A number of them have already implemented it proactively and realized significant savings."

Scott Lewin

Following this, League Data hopes to roll out an e-photo and electronic signature solution to enable electronic capture of member signatures and photos, for upload to Doxim, providing authorized access across an entire credit union. This will allow credit unions to migrate from physical paper-based records to a full electronic document solution, yet remain in full compliance with Know Your Member legislation.

Scott remains confident that the Doxim offering, platform and roadmap will keep pace as League Data implements more and more electronic document projects:

"Throughout our relationship, Doxim has always been there to help us roll out new initiatives. And once they're launched, we have absolutely no concerns about access and availability, as the Doxim platform has proven itself to have rock-solid security and reliability."

Scott Lewin



Doxim Inc. provides a full suite of enterprise content management products and services that together provide a web-based alternative to the printing and mailing of customer-centric documents such as statements, reports, client records, cheque images and transaction records. Doxim serves the financial services marketplace across North America, with over 300 clients in banking, credit unions and investment brokerage. These organizations work with Doxim to improve their client communications, streamline document access, meet compliance requirements, and reduce the expense, work effort and environmental impact associated with the creation, delivery and archiving of business critical documents. Doxim is a SAS 70 and CICA 5970 certified organization.

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