

CUPS Partners With Doxim To Expand Client Offerings, Build New Business, Significantly Boost Annual Revenues



EXECUTIVE SUMMARY

CUSTOMER

Credit Union Payment Services (CUPS) provides financial services to over 150 credit unions, banks, corporate clients and financial service customers across Canada.

CHALLENGE

CUPS needed a document scanning, imaging and archive solution that could interface easily with the multiple banking platforms it supports, and also provide strong electronic presentment capabilities.

SOLUTION

CUPS selected Doxim for its credit union experience, its leading position as a document management vendor, its cost-effective platform and its flexible solution that interfaces with multiple banking systems.

BENEFIT

Doxim has helped CUPS secure new business and add innovative services like e-statements, document imaging and check imaging. By adopting Doxim ECM, CUPS has also built new, recurring annual revenue streams.

THE CUSTOMER

CUPS (Credit Union Payment Services) provides robust and cost effective payment, document processing and other financially focused services to over 150 credit unions, banks, corporate clients and financial services customers across Canada.

THE CHALLENGE

When its clients asked for document scanning, imaging and archive services, CUPS responded, issuing an RFP to a carefully selected shortlist of six US and Canadian vendors. The winning vendor would provide a solution that could interface easily with the multiple banking platforms CUPS supports, and demonstrate strong electronic presentment capabilities. The successful solution would also match the cost conscious profile that customers had come to expect from the existing range of CUPS payment services.

THE SOLUTION

After a rigorous review process, CUPS selected Doxim for four key reasons:

1. Doxim has significant credit union experience, including an existing integration with online banking providers
2. Doxim is the leading document management vendor in the credit union marketplace
3. Doxim's Enterprise Content Management (ECM) platform is cost-effective, and perfect for rollout to all CUPS clients, from large to small
4. Doxim ECM is flexible and simple for non-technical credit union customers to use and easy to interface with the many banking platforms CUPS supports

THE START OF A CONTINUING PARTNERSHIP

Soon after the ECM service rollout began, CUPS customers presented a request for a sophisticated statement output solution, as many were migrating to a new banking platform that offered very limited statement output options.

Doxim Case Study

Following the positive adoption of the ECM platform by its customers, CUPS again turned to Doxim for help. Doxim combined the enhanced statement processing capabilities of Doxim Business Process Manager (BPM) with the e-statement and archiving capabilities of Doxim ECM to deliver a complete statement solution that met CUPS customers' needs. The capabilities offered by the combined platforms have also enabled many of them to advance their green initiatives — saving money and improving customer service en route.

Doxim BPM also helped CUPS to enhance its end-to-end document composition, conversion, routing and output processes. This has driven real cost savings for CUPS, and has significantly improved its ability to respond to ongoing customer demands for enhanced document processing services.

"The customer demand for an improved statement design became a priority sooner than anticipated, but Doxim stepped up and helped us with their signature 'all-hands-on-deck approach' that really does them credit. They really jumped through hoops to help us introduce the enhanced statement and e-statement solution in double quick time."

Duane Blahun, Vice President at CUPS Payment Services

ATTRACTING NEW CUSTOMERS

The partnership with Doxim has also helped CUPS secure substantial new business in both the credit union and banking communities. Doxim has worked closely with CUPS to help implement new solutions for these clients, making their relationships with CUPS an immediate success.

INTRODUCING INNOVATIVE SERVICES

With many of these clients, CUPS has extended the Doxim ECM integration, introducing e-statements, document and check imaging and signature card archives. With several clients, CUPS has even implemented a split screen application to compare checks and signatures online, helping its Credit Union and Banking customers adhere to Anti-Money Laundering requirements.

"Once the Doxim solution is rolled out to new clients, new services can be offered and revenue opportunities realized. The power of the Doxim archive has allowed us to really extend our footprint at our clients with electronic document solutions that have helped us secure sustainable, long-term relationships with many new customers."

Duane Blahun

HELPING GROW REVENUE STREAMS

When CUPS adopted the Doxim ECM and BPM platforms, the move was both bold and innovative. And it's been a strategic business decision that has added significant new, recurring annual revenue streams for CUPS and positions it well to service clients into the future. Duane attributes much of this to the strength of the partnership that CUPS has built with Doxim.

"I've always believed that the mark of a good long-term partnership is how successfully you navigate the opportunities that get presented. We've been working with Doxim for several years now, and they have always stepped up to the plate and helped us to overcome new challenges successfully. To my mind, that's the mark of a great partnership."

Duane Blahun



DOXIM Inc., headquartered in Markham, Ontario, 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, bills, check images and transaction records. Banks, trusts, credit unions, brokerages, utilities and other organizations across North America are working with DOXIM to streamline business processes, strengthen communications, improve access, meet compliance requirements, and reduce the expense, work effort and environmental impact associated with the workflow, creation, delivery and archiving of critical documents.

445 Apple Creek Blvd, Suite 100 Markham, Ontario L3R 9X7 Phone: 905.475.9876 Toll Free: 1.866.475.9876

CUPS-0310

