



Case Study

BanRegio

banregio

Industry: Banking

Country: Mexico

Learn how BanRegio, a \$4 billion dollar publicly traded bank, transformed from manual, paper-based processes to an intelligently automated digital bank. Today, BanRegio drives the highest levels of operational efficiency by leveraging the ProcessMaker platform.

The Challenge

- Data was input manually and kept on Excel spreadsheets
- Calculations were not standardized in branches
- Room to improve SOP to maximize efficiency
- No system in place to track claims and requests
- Longer customer response times to respond to requests

The Solution

- Digitized workflows between staff and customer interactions
- Implemented online application for claim filing
- Automated case management and operations
- Created automated forms for customer response times.
- Extended previous reporting system

The Results

- Implemented 14 new internal processes
- Stronger, automated process management
- 2,000+ cases per month, and 200+ daily file requests
- Instilled greater customer confidence and experience
- Reduced turnaround time for requests and approvals
- Expedited internal operations

Highlighted Processes Implemented:

- Request for certificate of debt level
- Request for a credit-related product or operation
- Request to restructure an agreement
- Request a payment note
- File an insurance claim request
- Make a request regarding a deposit
- Make a special check request
- File a complaint regarding
- Electronic transaction
- File a complaint regarding a credit transaction
- File a complaint regarding a liability transaction (check-related)
- Request for a document or file from secure warehouse
- Request from general archives
- Complaint or clarification related to a point-of-sale transaction
- Complaints and clarifications related to an ATM



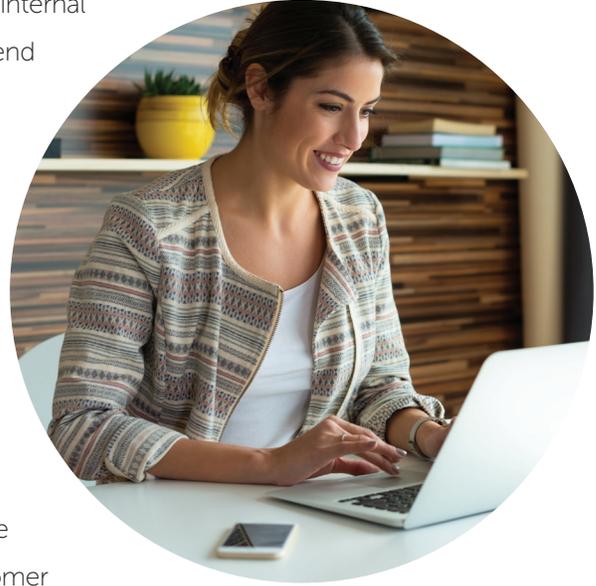
Request a free demonstration of ProcessMaker and discover for yourself how this banking process automation software platform empowers you to innovate, adapt and respond.

Request a Free Demo
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The Challenge

Before ProcessMaker, BanRegio's process management, internal organization, and customer interactions operated on a blend of manual processes and minimal software applications. The lack of automation technology during the workflow process prevented BanRegio from delivering its highest customer satisfaction potential.

Banks often work within volatile environments due to compliance regulations like the Mexican FinTech Act and Securities Market Law, market changes, and consumer demands. BanRegio required a fast, easy solution to stay competitive in the market. The platform had to increase the operational health of BanRegio, accelerate its customer experience strategy, and integrate easily with its current systems.



With ProcessMaker, BanRegio wanted to improve five major areas of its business:

- 1. Data migration.** The bank needed to migrate data from an Excel spreadsheet and individual workstations to a central location and more robust application.
- 2. Process standardization.** BanRegio's processes and calculations needed to be organized and managed more efficiently, then incorporated into newly defined workflows.
- 3. Operations.** BanRegio needed to build out a plan for standard operating procedures for evaluating process performance and efficiency.
- 4. Project Management.** Institution wanted to provide its customers with the ability to track the progress of its claims. Finally, BanRegio wanted to reduce its response times to customer inquiries to improve the customer experience.
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Why ProcessMaker

By leveraging the ProcessMaker platform, BanRegio implemented an online app that would service the customer's investments. Administrative personnel created forms that would automatically be routed onto its appropriate path to provide quick and efficient response times.

Additionally, ProcessMaker allowed retail store customers to easily file and track their claims and concerns. BanRegio integrated its Pentaho reports with ProcessMaker, allowing managers to monitor the average process and customer response times. Those managers used that information to then evaluate the effectiveness of their processes.

The Value Created

Following the ProcessMaker platform's integration, BanRegio was thrilled with the results of its 14 new internal request processes. Through an intuitive graphical interface and automated claims, the institution created quicker turnaround times. As a result, its customer satisfaction soared.

BanRegio migrated customer data to standardized formats in a new central location. It also standardized internal file requests and processing. Managers can now make timely data-driven decisions by using dashboards that show the status of information processing. Bank employees and customers can also see where their requests are in the process lifecycle.

On the ProcessMaker platform, BanRegio has greatly standardized its processes and improved transparency within the institution. This immediate access to information has created greater customer satisfaction, leading to more confidence in BanRegio among its customer base.

About BanRegio

Since it opened in 1994, the Regional Bank of Monterrey, S.A. (also known as BanRegio) has prided itself on the high level of knowledge and experience it offers to clients. The bank's mission is to be in tune with its customers and the market to deliver the best experience possible.

BanRegio operates 133 branches in 44 cities in central and northern Mexico. It offers services mainly for small and medium-sized companies, such as business loans, leasing, factoring and working capital loans.



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About ProcessMaker

ProcessMaker is low-code BPM and workflow software. ProcessMaker makes it easy for business analysts to collaborate with IT to automate complex business processes connecting people and existing company systems. Headquartered in Durham, North Carolina in the United States, ProcessMaker has a partner network spread across 35 countries on five continents. Hundreds of commercial customers, including many Fortune 100 companies, rely on ProcessMaker to digitally transform their core business processes enabling faster decision making, improved compliance, and better performance.