



## Case Study: Invex



### The Problem

Invex experienced several pain points before ProcessMaker. For one, it was near impossible to extract reports from the current platform. The platform also used satellite applications to operate the processes required by customers. Invex also needed web services and database access to relay information to management.

One of the greatest struggles was the long response time to customers. Non-structured data existed for events registered in the system too. Invex experienced significant time loss during training sessions. All the call center employees required training to manage the existing system.

### The Solution

Tecnoimplanta is an elite ProcessMaker partner in from Mexico. Tecnoimplanta developed a solution to address the Call Center pain points. First were the most time-consuming processes and those with the largest business impact. The implementation involved connecting systems and people from different areas in Invex.

ProcessMaker's solution allows them to join all the applications on one platform. This includes everything needed for current processes executed by Call Center employees.

### The Value Created

After implementing ProcessMaker, customer response time was decreased from 30 minutes to only 3 minutes per case. The Call Center increased its productivity thanks to newly automated processes as well.

**Invex Bank improves call center response time by 90% after implementing ProcessMaker to handle workflows and data transfer.**

**Industry:** Finance

**Country:** Mexico

### The Results

- Saved annually an estimated 3,000 hours
- Saved annually an estimated \$100,000 USD
- 90% efficiency gain in customer response time
- Managers' information is now available based on a database model
- Cross-platform collaboration achieved through the use of ProcessMaker web services connected to various satellite systems

In addition, data tracking and control has improved since a centralized data center was implemented. Better document management has enabled InveX staff to generate reports easily without paper-intensive processes. As a result, the cost of the keystroke charges model from the current system has decreased. Training for call center members has reduced, thanks to a user-friendly interface to design and deploy workflows without coding. InveX has also reported a significant reduction in human errors, meaning fewer penalties from the government during audit checks.

Today, InveX is now an automated bank serving customers both in Latin American and the United States.

### About InveX

InveX Bank is a private Mexican banking company, which provides financing products and services in local and foreign currencies. The bank also provides financial consultancy services covering investment, savings, and infrastructure funds. InveX is part of INVEX Controladora, through InveX Grupo Financiero. It has offices in Guadalajara, Federal District, and Monterrey, and operates a branch in Miami, United States. In 2014, Banco InveX acquired Mexico's credit card portfolio of Brazil's Itaú Unibanco, a move in line with InveX's strategy to become the country's leader in the payment systems business.

### About ProcessMaker

ProcessMaker is a 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.

### Highlighted processes

- Credit Card Activations
- Transcoding of Credit Card
- Register of Clarification

*InveX is a mid-sized Mexican Bank focused on credit card management. Operations exist on "Total System", a system which uses legacy mainframe architecture. The system produced fast response times but lacked the user interface seen in today's applications. The entire interface is black and white text screens. It difficult for users to extract, manage and control processes in the platform. InveX increased its banking call center operations by implementing ProcessMaker to handle workflows and data transfer.*

