

# CASE STUDY · Metzler

INDUSTRY · Financial Services



## AT A GLANCE

### Client

Metzler is a German-based, family-owned banking company that was launched in 1674. Headquartered in Frankfurt am Main, Metzler's 650 employees provide services for private and business clients.

### Challenge

To distinguish itself from the competition by providing improved client services via personalized communications, and to efficiently comply with regulations for client correspondence.

### Solution

StreamServe *Financial*™ enabled Metzler to automate the creation and presentment of documents in any format via any channel.

### Results

Metzler customers are now likely to buy more products due to personalized, relevant offers that also automatically comply with local regulations.

## Metzler gains currency with its clients by using StreamServe *Financial* solution

Metzler is a German-based, family-owned financial institution that traces its roots back to 1674. It enjoys a rich and durable history because over the centuries it has endeavored to constantly improve its product offerings and service for private and business clients.

"To be truly competitive, it's critical for us to establish an IT infrastructure that yields benefits from all information stored throughout the enterprise," said Constantin Nicolaidis, IT manager at Metzler. "The big challenge was to ensure that all applications worldwide supported our goal of efficiently providing flawless transaction and Enterprise Document Presentment (EDP) functions that complied with existing regulations."

To accomplish this, Metzler realized that it must consolidate its information systems so that users could access all account information via a central application. The firm selected StreamServe's EDP solution to tackle the challenge.

### "No significant legacy system adjustments"

"The StreamServe implementation required no significant legacy systems adjustments, so this was a very cost-effective solution for us," said Mr. Nicolaidis. "It was one of the deciding factors."

Prior to the implementation of StreamServe®, the IT environment consisted of various systems that were unable to interact with each other. This meant two things: Metzler couldn't leverage opportunities offered by a system that allows employees to access company-wide information, and employees often had to perform time-consuming, manual tasks to keep all systems current with the latest information.

So Metzler selected StreamServe *Financial*™ to tackle these challenges.

### Building on a basic concept

The concept behind the solution is quite basic, but the results can be staggering. In short, the solution enables automated, centralized creation and presentment of enterprise documents in any format via any channel (for instance, traditional mail, fax, and electronic transmission) to clients, suppliers, and partners.

And thanks to its capability to consolidate information from all kinds

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— Constantin Nicolaidis, IT manager  
Metzler

of sources, StreamServe *Financial* is now used as a centralized EDP solution.

“If a change occurs in the central system, it is displayed in all connected systems throughout the enterprise,” said Mr. Nicolaidis. “As a result, all information is continually updated in all of our systems.”

#### Enhancing client loyalty

By streamlining the EDP process, Metzler decreases the time it takes for their clients to receive personalized messages and new product offerings. The solution enables Metzler to be much more cost-efficient by consolidating information into fewer documents and shifting to electronic document delivery for those who prefer receiving their correspondence via this channel. By giving clients this level of personal treatment, Metzler was able to increase the value of its client relationships and enhance customer loyalty.

This is in stark contrast to how most financial services firms treat their customers. In a 2007 research report Forrester noted that 88 percent of typical financial services clients claim to receive regular communications for products and services that are not directly relevant to them and their situation. By personalizing offers and adhering to customer preference for delivery of correspondence, financial institutions such as Metzler are able to distinguish themselves from the rest of the pack.

“With StreamServe *Financial*, we have a flexible, cost-efficient product that equips us well for dealing with future, multi-channel management challenges,” said Mr. Nicolaidis.

#### Complying with regulatory requirements—automatically

The solution can automatically facilitate compliance with a variety of legal and regulatory requirements. For example, it’s now possible to respond to regulatory requests for information in days rather than weeks because the solution automatically creates new templates. And reports are more accurate because manual entry has been eliminated.

“The StreamServe investment has been very important to us in many ways,” said Mr. Nicolaidis. “Our clients are now more likely to buy products and services from us because we’re able to give them more personalized relevant offers than ever before.”

#### To find out more

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How Does Your Company Present Itself?