

Case Study



Client Profile

Organization

Major credit union

Size

Almost 60,000 members,
over 400 employees

Industry

Financial services

This client is one of the fastest growing financial institutions in Western Canada. Its services include banking, insurance, investments and business lending.

FINANCIAL SERVICES ECM

Business Needs

The client had no central system in place that allowed employees to share their work (other than a very basic document repository application). This made it difficult to:

- Quickly and efficiently update, delete and otherwise manage business content like emails, Word files and PDFs
- Ensure that staff throughout the organization were accessing the most recent versions of shared documents

Solution

Knowledgetech deployed an enterprise content management (ECM) system, based on Microsoft's SharePoint Server platform. This solution was designed to provide the client with:

- A centralized source of business content
- A user-friendly document management system, with a wealth of sophisticated features – including WIKI functionality and advanced search capabilities

Benefits

- Created a single repository for all content, avoiding the costs and inefficiencies associated with maintaining multiple systems
- Streamlined workflows and increased flexibility, facilitating effective collaboration across the organization, saving time and maximizing productivity
- Increased data quality, ensuring employees had reliable access to complete, accurate and up-to-date information



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