

CIBC Bank USA

Industry

- Financial Services

Solutions

- OpenText™ Content Suite
- OpenText™ Web Experience Management
- OpenText™ TeleForm™

Services

- OpenText™ Professional Services

Results



Reduced cycle time,
paper consumption



Personalized web collaboration,
higher employee engagement



Faster response for enhanced
customer service, compliance



Support for impressive
company growth



CIBC rejuvenates digital collaboration

North American bank integrates core business systems, serves clients with personalized experience and content management from OpenText

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OpenText Content Suite
and OpenText Web
Experience Management
really strengthens the value
proposition for our users."***

Dean Haacker
Chief Technology Officer
CIBC Bank USA



With plans to upgrade its intranet, content management and scanning systems, CIBC Bank USA took a holistic view to take a full step forward, implementing a platform based on rich, integrated technologies that support today's work and lifestyles.

The bank's intranet serves as the primary communications vehicle for more than 1,300 full-time employees in the United States. They use the internal system to collaborate and complete daily tasks.

"Our primary goals for a new intranet included a clean, simple design, improved search, more efficiently organized documents, an automated employee directory, the ability to integrate with bank systems and the ability to push personalized content to employees," related Dean Haacker, chief technology officer with CIBC Bank USA, previously The PrivateBank. It also recognized an opportunity to upgrade its content management solution and replace a legacy scanning solution.

Haacker and his team upgraded and unified OpenText solutions. **"The combination of OpenText Content Suite and OpenText Web Experience Management really strengthens the value proposition for our users,"** he noted.

The bank had been implementing and gaining efficiencies with OpenText[™] Content Suite since 2009 and saw the potential in Content Suite 16 to create a simple, responsive user interface, designed to meet users where and how they want to work.

"The Smart View interface just feels more intuitive, more natural," Haacker said, explaining that users like the drag-and-drop functionality, role-based views and searching, among other features. **"It makes it easier for users to find what they're looking for. It saves them time when they're going to do a task."**

Haacker considered the bank's requirement to replace its intranet as a great opportunity. **"We redesigned it. We modernized it with OpenText Web Experience Management 16, an enterprise-grade solution for creating and managing web content,"** Haacker said. **"It's an important place where people come together for information about what's going on in the bank and news that they need to know."**

Bank employees file expense reports, update vacation time and manage other tasks by linking to applications and documents—an integration that simplifies user access to shared applications. Web Experience Management is integrated with bank systems to create a personalized user experience.

Among other features, the bank's IT team designed a landing page with the Smart View interface for all Content Suite users as well as custom dashboards for front-line bankers and client specialists. The self-service portal provides validation workflows and supporting documentation. Front-line employees also receive personalized ticklers on active or overdue workflows within Content Suite.

The bank also replaced its legacy scanning solution with OpenText[™] TeleForm[™], an intelligent forms automation solution. The bank added the ShinyDrive user interface from OpenText partner ShinyDocs to ease document retrieval for users accustomed to Windows environments as well as GCI PowerTools from OpenText partner GlobalCents to extend key search and workflow processes. To tie all the systems together, the bank worked with the OpenText partners and OpenText Professional Services. **"It was a total team effort, every step of the way,"** Haacker recalled. **"I'm happy to say that we released our updates on schedule, within budget."**



About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit [opentext.com](https://www.opentext.com).

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