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LA SOCIÉTÉ GÉNÉRALE ADOPTS IN-HOUSE SCANNING



ISSUES



When a customer dossier is created, inserting necessary justifying documents is a long process: photocopying of the originals, preparation and sending to the scanning provider then inclusion in the EDM. The aim is to abandon outsourced scanning in order to:

- speed up the EDM integration process
- improve image quality
- compress files locally to avoid saturating the network
- maintain the commercial contact with customers
- provide 2,300 branches with an identical solution

SOLUTIONS



Replacement of the outsourced scanning service by the installation of a very compact office scanner to scan up to 20 pages/min, interfacing with the centralised EDM at each account manager's workstation.



We have equipped our branch account managers with scanners to regain control over scanning quality while optimising the management of customers' accounts and the commercial relationship."

Rémi Calcagnetti,

Director of the «iMage» project at Société Générale

BENEFITS



- Time saving: account managers no longer have to leave their office to photocopy and then send documents to the provider
- Scanning quality: justifying documents are no longer scanned from copies but from originals
- Simplicity of the process: the dossier is completed in real time during the meeting
- Steady return on investment according to the affected processes



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To simplify its processes and improve scanning quality, Société Générale is going paperless: scanning the justifying documents for its customer dossiers «at source» by equipping all its account managers with their own scanners.

As a bank, Société Générale is required to attach justifying documents such as identity papers, residential and income documents to its customer dossiers. The originals are scanned during meetings with customers while compiling the dossiers. Until 2010, Société Générale had opted to outsource scanning of these justifying documents. The images of the documents were then reinjected into the company's EDM in file form.

The account managers in the group's national network of 2,300 branches were required to photocopy the original documents. These were then prepared and assembled before being sent to the provider. *"The operating mode presented a few problems»,* explains Rémi Calcagnetti, Director of the Société Générale's "iMage" project, *"including legibility. Scanning of photocopies does not always produce good results, especially on identity papers and especially when the photocopy is in black and white rather than in greyscale. In these cases, the photo on the card is unusable".*

In late 2010, Société Générale therefore decided to entrust the scanning of

justifying documents to its account managers by equipping its branches with 13,500 desktop scanners supplied by Spigraph.

ADAPTING TO A VERY SPECIFIC ENVIRONMENT

After workshops organised with the account managers, the bank rapidly opted for desktop sheet-feed scanners, characterised by their ergonomics and high quality scanning. The scanning pilots and software delivered with the scanner were also decisive. The branches' workstations work under Citrix, an environment for which high performance pilots are rare and which requires control of the band width. To avoid weighing down the network, Société Générale therefore opted for locally installed scanners, with local file compression before transfer to the centralised EDM. Finally, *"the sheet-feed model was immediately acclaimed by our account managers which they can use, for example, to scan an identity card, front and back, in one single run."*

After a pilot scheme in December 2010, the group started large-scale deployment in all its branches. In the meantime, Société Générale developed the interface between the scanning software and its EDM to automate file transfer. In July 2011, just eight months after the pilot, the installation of 13,500 scanners was completed and 2,300 branches were operational.

A RAPID RETURN ON INVESTMENT

The success of this initial stage opened up new possibilities on which Société Générale intends to capitalise. Very satisfied by the time saved, account managers like the fact that they no longer have to leave their office during a meeting to photocopy documents. Scanned and transferred to the EDM in real time, the justifying documents are no longer piled up on offices in the form of copies to be sent to a provider, which simplifies the general process and improves dossier management. *"In concrete terms, the commercial phase is no longer disconnected from the administrative phase and account managers feel responsible for the quality of the scanning, which they can check directly,"* explains Rémi Calcagnetti. *"Generally speaking, we win on all levels, which is why we intend to extend this system to other documents. We have estimated a five year return on investment, but if we open up the perimeter, it could be even shorter!"*

ABOUT SOCIÉTÉ GÉNÉRALE

Société Générale is one of the leading European financial services groups making €26.41 billion in turnover in 2010. Based on a diversified universal banking model, the group combines financial solidity with sustainable growth strategy, aiming to be the relational bank, a reference on its markets,

close to its customers, chosen for the quality and commitment of its teams. Its 157,000 staff, present in 85 countries, follow up more than 33 million customers worldwide.

www.societegenerale.fr