

Raiffeisen Zentralbank Österreich: Decision in favor of ecspand Contract Management



What RZB needed was a solution for the management of its entire contract process: from the procurement request over the (audit-proof) approval up to contract generation and contract archiving as well as the invoice verification process. Austria's third biggest bank decided in favor of ecspand.

With total assets of 147.9 billion euros as of December 31, 2009, the Raiffeisen Zentralbank Österreich AG (RZB), founded in 1927 and headquartered in Vienna, is one of Austria's leading commercial and investment banks and the third biggest bank in Austria. RZB (www.rzb.at) is the top institute of the Austrian Raiffeisen Bank Group (RBG) and the core enterprise of the RZB group.

RZB considers Austria as well as Central and East Europe as its home markets and is one of the region's top players. The bank is furthermore represented by subsidiaries in various international centers of finance and in Asia's emerging markets.

■ Point of departure

Together with his team, Mr. Haberschusz-Beaufort (Organization / IT: Provider Management Team) was looking for a contract management solution. It was the whole process of contract management at RZB that had to be optimized: from the procurement request over the audit-proof approval up to contract generation and archiving as well as invoice verification.

It was a *"typical situation that can be found in many companies: the existing solution 'had grown' over the years. Many partial solutions were implemented which were not or only partly connected to each other"*.

The contract data was saved in several data bases (Notes, Access, Excel, etc.) – with unfavorable consequences such as limited possibilities of evaluation, unsatisfactory data quality, missing links and, finally, difficult traceability of data and documents.

The result: high administrative efforts for data capture in several tools and a very *"paper-driven"*, confusing contract handling. Thus, there was an urgent need of optimization with regard to transparency, efficiency and quality assurance.



Picture: Raiffeisen Zentralbank Österreich

■ Project

Mr. Haberschusz-Beaufort reported that he and his team had made significant efforts in evaluating the existing solutions. More than two years passed before the ideal solution was identified. Only one thing became quickly obvious: the new solution would have to be based on Microsoft SharePoint.

The selection process was quite sophisticated, which added to the high requirements of the product and the *"clearly defined budget"*.

Already the first contact with d.velop GmbH Austria, headquartered in Vienna and affiliate of the ECM supplier d.velop AG, was optimal. *"Their performance was very conclusive – we understood that there*

were the right answers to our questions and that ecspand would not only cover our requirements but could even offer additional functionalities if we needed them."

Finally, the offer submitted by d.velop GmbH Austria responded to the existing needs in all fields: it stayed within the defined budget (investment cost and operating expenses), complied with RZB's requirements, was based on excellent references in the German-speaking countries, meant a cooperation with a flexible, highly motivated partner, included a future-oriented, flexible technical platform, and offered the possibility of implementing various modules such as one of RZB's own modules as well as a workflow engine (Nintex).

After several live presentations and an intensive workshop there was nothing that stood in the way of a timely project kick-off.

■ Project progression

Mr. Haberschusz-Beaufort was immediately enthused by the professionalism of d.velop GmbH Austria's team: *"All the time, we were working together in a flawless and very cooperative way."*

There were quite a few special features that had to be taken into consideration throughout the project. For instance, the application was meant to be operated on a separate SharePoint server. Furthermore, the coordination of RZB's own development, a Nintex workflow engine, and d.velop was very complex. And additionally, RZB's style guide had to be considered, too. With regard to the workflows, the precise definition of the user rights was a very particularly important and time-consuming subject.

"All the time we clearly focused on quality" said Mr. Haberschusz-Beaufort, *"and we would not sacrifice our quality demands on the altar of a highly ambitious schedule."*

Why ecspand, d.velop's SharePoint ECM solution?

ecspand responds to all our needs.

The Contract Management module by ecspand supports all necessary business processes throughout the contract's entire life cycle. The software solution fulfils every obligation in terms of documentation, reporting and information and provides all departments of RZB in time with the necessary contract data.

Thanks to defined workflows, processes are accelerated and time and costs saved for contract management.

Mr. Haberschusz-Beaufort, Provider Management and RZB's Project Manager: *"With ecspand by d.velop we have acquired the tools we needed to make our processes more transparent and more efficient. Now, a central information platform is available. Thus, based on SharePoint, we have implemented a solution that complies with all our requirements and helps us to save time and costs. And, thanks to modern technology, the solution can be adapted to and enhanced for future tasks."*

■ Volumen

There are 1,000 active contracts to be handled – and every year, about 500 new contracts are concluded. Each contract comprises one to 15 documents. In total, about 400 employees (including ten responsible data originators) need access to the application.

These employees could be trained by instructions provided by e-mail and an online manual as the team of data originators (Provider Management) were continuously and actively involved in the project.

■ Resume

Although there was – as in many projects – a certain *"training curve"* and a little more time was needed than initially planned, all requirements of RZB were fully complied with.

Mr. Haberschusz-Beaufort is enthusiastic about ecspand – and not only because the budget could be carefully respected. The entire project team

could gain important experience with the SharePoint technology, which becomes increasingly important, also at RZB: *"No matter how the further procedures will appear internally – with ecspand we will be able to react flexibly to any kind of process modification. Our decision in favor of ecspand was exactly the right thing to do. For us it was vital to find a solution that fits exactly. And that's what we have succeeded in – with both, product and partner."*

Status: As of August 2010 - bsg

ecspand Partner

This project has been realized by d.velop GmbH Österreich



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