

# Retail bank

## Client profile

The client is a large, national consumer bank that has high new-hire teller training demands. Because banks are providing regulated services to the public, training is critical for the success of entry-level, customer-facing employees.

## CASE STUDY



### Objective

The bank needed to improve production and delivering of teller educational materials to field trainers. Obsolescence, lack of order process controls and transparency, as well as longer-than-desired lead times caused this bank to look for better solutions.

### PBMS solution

Pitney Bowes Management Services (PBMS) created a user portal and production workflow for material design and ordering. The trainers build their material with bank-supplied, standardized templates and content. PBMS developed a multi-site distributed print production and fulfillment platform, utilizing regional PBMS Document Solution Centers (DSCs) for more local output. The PB-hosted web ordering tool, includes the ability to manage cost accounting for the bank.

### Results

Order-to-delivery cycles have been compressed and new reporting features of the platform provide the bank with transparency and control.

### Benefits of Web2Print and print on demand

- Enterprise control of content and templates
- Spend control and order visibility
- Elimination of inventory obsolescence
- Fast turnaround

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