

# CAIXA Increases Control, Flexibility, and Effectiveness of Portal-based Services with Intalio|bpms

*Intalio Brazil and Intalio|bpms Help CAIXA Revolutionize Online Banking Services for Business Customers*



<b>Customer</b>	: Caixa Economica Federal (CAIXA)
<b>Industry</b>	: Financial Services
<b>Product</b>	: Intalio bpms
<b>Application</b>	: Business Banking Portal

Caixa Economica Federal (CAIXA), the second largest government-owned financial institution in Brazil and one of the largest banks in Latin America, has played a key role in the lives of millions of Brazilians since 1861. The bank influences finance-related public policy in the federal government and plays

a key role in promoting urban development and social justice in the country; Caixa is seen as a tool for public investment and expansion of access to financial services to the Brazilian public. In addition, the bank manages most of the Brazilian lotteries.

**intalio|bpms**  
*The Modern Way to  
Optimize Business Processes*

## The Business Challenge

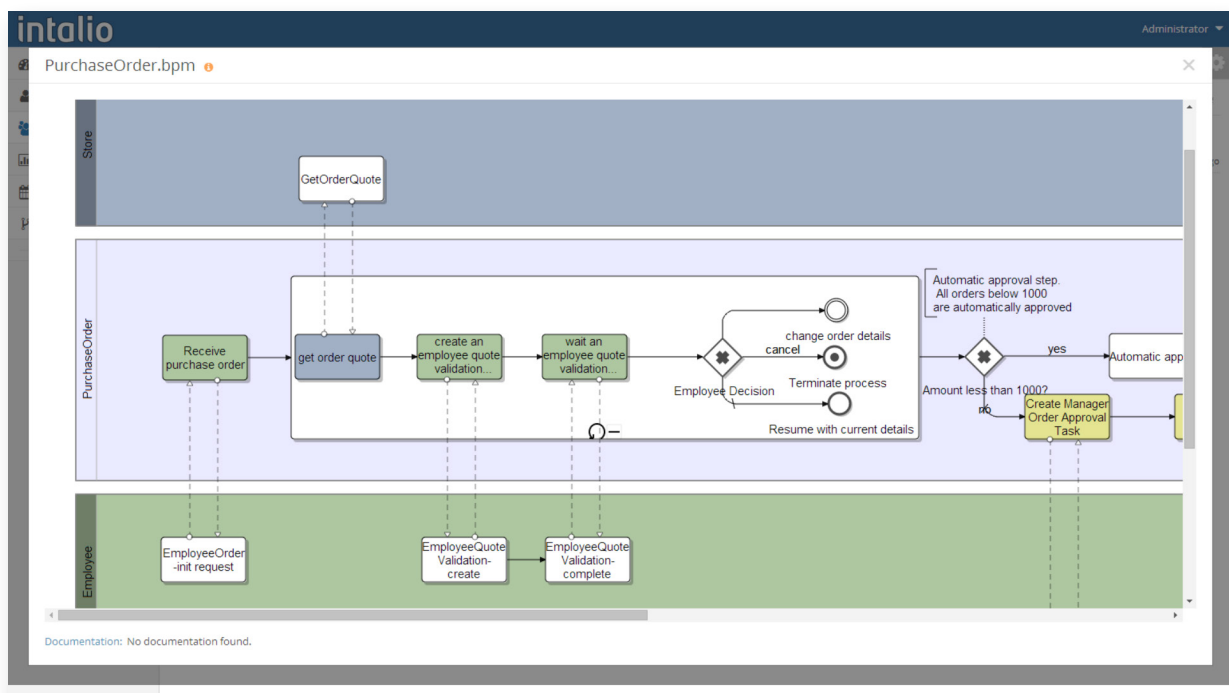
As part of a plan for growth and modernization in the 21st century, CAIXA sought to revolutionize banking services in Brazil by creating an online portal for business banking services. To achieve this goal, CAIXA needed to increase control, agility, and effectiveness of business processes on the backend while increasing the visibility of these services for business customers on the front end. After evaluating

current processes and systems and identifying goals and possible strategies, CAIXA chose to work with Intalio Brazil to implement a cutting edge BPM system to address the varied needs of the bank as well as customers. CAIXA had successfully worked with Intalio Brazil on a prior project and knew the Intalio team and the Intalio product -- Intalio|bpms -- was up to the task.

## Intalio Solution

Working with Intalio Brazil and implementation partner CEF to identify critical processes appropriate for mapping and automation, CAIXA developed a far-reaching implementation that would provide new services for customers via a browser-based portal, streamline backend

tasks through existing infrastructure, and mine sales data for ways to market new products to customers. The solution was cutting-edge -- but also integrated legacy systems and allows for later expansion as the business needs scale.



## A Solution for Now, Scalable for Later

As a result of this successful portal implementation, CAIXA chose to expand the BPM solutions to additional Point of Service offerings. The solutions themselves -- from

customer contact points to tracking and analysis of performance -- have been enormously successful. Intalio|bpms supports tasks such as:

Requests and tracking of technical and environmental surveys

Report generation

Installation processes

Delivery of products at POS terminals.

## Intalio Impact: Mobility, Competitiveness, Satisfaction

Choosing Intalio|bpms and Intalio Brazil was CAIXA's first step in establishing streamlined and efficient processes for the organization as a whole. The concept of BPM has been disseminated throughout the

organization and is helping standardize best business practices for mobility, economy, competitiveness and customer satisfaction is a highly competitive marketplace.

## About Intalio

Intalio – The Modern Way to Build Business Applications. Intalio's suite of products enables businesses, large and small, to rapidly build business applications that are cloud-scalable and mobile-enabled to support an agile response to their market. Our standards-based software can be found powering over 1000 businesses including

some of the largest in the world like Deutsche Bank, General Electric, NTT, Irish Revenue Commission, Singapore Airlines, Facebook and Google. Intalio is headquartered in Palo Alto and has over 100 partners and world class investors. To learn more about building modern applications, visit [www.intalio.com](http://www.intalio.com).

# intalio

28 State Street  
Boston, MA, 02109, United States

+1 (650) 596-1800 (voice)

+1 (650) 644-3365 (fax)

[info@intalio.com](mailto:info@intalio.com)