

# Haventree Bank

## Haventree Bank Gets 2 for 1 with Email Archive Upgrade and Records Compliance Built-In

IT & Records Teams Get More Features and Value by Moving to Collabspace



*"We wanted a solution with workflows that could use preset content rules to send documents to those in the business who were responsible for the review, an audit trail, and to avoid manual processes and emails. Collabspace provided that."*

**Agata Wszolek**

*Manager, Records & Information Governance*

### COMPANY

#### Name

Haventree Bank

#### Industry

Financial – Mortgage Lending and Investment Services

#### Customers

Canadian aspiring homeowners.

#### Employees

170

[www.haventreebank.com](http://www.haventreebank.com)

### DATA MANAGEMENT PROJECT OVERVIEW

Haventree Bank is a federally regulated Canadian bank that provides alternative mortgage programs and insured GIC deposits, so they must regularly secure, manage and maintain information. Previous solutions were manual processes and an older EDRMS system which required end users to review, track and manage information. As the on-premise email archive approached its end-of-life, the IT and RM departments teamed up to implement Collabspace, a cloud solution that would allow them to sunset old systems, create less dependency on manual processes, automate current record review processes and ensure compliance to industry and regulatory standards. This presented a great opportunity for the organization to move to the cloud with a new solution that provided email archiving and records compliance.

## HAVENTREE BANK'S HURDLES

- Manual Processes Reliant on Time-Consuming Reviews and Approvals
- Minimal Workflow Capabilities and Automation
- Security Trimming Previously Unavailable
- Limited Content Search and Discovery

## HAVENTREE BANKS'S VICTORIES

- Adopted CollabSpace for Complete & Centralized RM
- Added Functionality for Increased Employee Productivity
- Automated Workflow Capabilities for Better Cost & Time Efficiency
- Secure Permissions Settings Relevant to Particular Roles and Departments
- Role-Appointed Access to Advanced Search Capabilities

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*The CollabSpace training was really great and well customized to our processes. Working with Collabware's Records Management Analyst, Mia, has been amazing. She's really good at learning our processes, the problems we are looking to solve, understanding how CollabSpace works, and being able to help us create solutions that work for us.*

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## PROJECT OUTCOME & FUTURE IMPACT

CollabSpace provided Haventree Bank's IT and RM teams with the capabilities to address their challenges, while moving the organization to the cloud. The Haventree Bank team continues to evolve their internal processes by expanding the scope of content managed in CollabSpace and creating workflows based on content rules and metadata, making content management more autonomous. This will be particularly valuable for departments that need to surface and process information quickly for audit purposes.

Moving forward, Haventree Bank employees are keen to utilize analytics, such as content deleted at source in Exchange, as well as sensitivity labelling to further identify, optimize and streamline their retained content and disposition schedules. They are also hoping to use CollabSpace to manage other platforms and get the Collabware team's help to test out any improvements they can make on disposition using Doc sets.

**For help on your next project, call us at 1-855-268-0442 or email: [contact@collabware.com](mailto:contact@collabware.com)**