

# Case Study: Bank Administration Institute

Hands-Free Global

Today's banks share an increasingly crowded marketplace with non-bank financial services companies. Education and research help banks stay ahead of the game. Bank Administration Institute delivers what they need, when they need it most.



## The Problem

Bank Administration Institute (BAI) is committed to helping financial services companies keep up with the ever-changing industry environment. In addition to providing a full range of educational services, including conferences, seminars, and custom education, as well as strategic research, the Chicago-based organization answers hundreds of daily information requests, much of it by fax. BAI Information Services Manager Jim DiNapoli knew he had a problem. "Employees were spending a big portion of their day sending multi-page, glossy brochures by fax," he said. "Imagine feeding a 12-page brochure through a fax machine 30 times in a row. That's how we used to do it." Not only were valuable staff resources being wasted, but response time was not as good as it should have been. BAI needed a way to respond quickly and effectively to help turn information inquiries into sales revenue.

## The Requirement

When DiNapoli began evaluating fax server software in 1994, he wanted a solution that would enable BAI to centralize fax communication on a single server, be easy to install, and wouldn't interfere with other applications running on the server. He also wanted to give BAI's highly mobile sales force the ability to access and fax information remotely. Zetafax fit the bill.

## The Solution: Zetafax

When he picked Zetafax, DiNapoli knew he had found a tool that would facilitate the way BAI does business. Zetafax is installed on the server and on more than 100 employees' desktop and laptop computers. When BAI developers create brochures and collateral materials in-house, they can now send them directly to Zetafax. From there, the server sends them out on command. Should a customer request multiple copies, Zetafax can deliver them all, and broadcast faxing— whether to hundreds or thousands of recipients, can also be completed by Zetafax. What's more, BAI's sales force can dial into the server, access the latest materials and, easily, have Zetafax send them to customers or prospects. Zetafax also enables those same sales executives to

What they say about  
Zetafax

*"Zetafax has one of the cleanest applications I've seen; it doesn't affect any other applications running on our server. Our sales force sends a brochure request and Zetafax does the rest, allowing them more time to focus on their customers' needs."*

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store the latest information on their laptop-based server, which automatically kicks in and uses the local computer modem when the network service is not accessible.

But it's not just brochures that BAI uses Zetafax to send. Business letters, spreadsheets, presentations, and administrative paperwork are all being distributed using Zetafax. "We're working with so many vendors, being able to fax a common form, such as a request for the vendor's tax ID number, directly from the server, for example, is a big time-saver."

The results? Using Zetafax, in conjunction with Internet technologies, BAI can respond to its internal and external customers with greater efficiency and BAI's sales force can work more effectively. Jim DiNapoli's staff can concentrate their efforts on enhancing current and developing new information technology services for BAI.

Equisys produces software packages for document production and delivery, including the award winning Zetafax® network fax server and newly acclaimed Zetadocs® PDF software that creates and emails personalized PDF documents.

Our software products are designed for small and mid-market businesses, and for departmental use at multinational companies. They stand out from the competition by being simple to install and manage, reliable and great value - backed by outstanding service and support.

We have over 60,000 customers, in more than 100 countries, who are served through an international partner network of distributors, VARs, resellers and ISVs.

Our market leading fax server, Zetafax, speeds the flow of critical business documents by enabling users to send and receive faxes on their PCs. It integrates with ERP, CRM, accounting and other applications for automated faxing from those systems, providing auditable records of fax communications.

Zetadocs helps users work smarter by creating and emailing PDF documents, streamlining business processes to remove tedious manual procedures and help companies improve the service levels they offer.

Equisys was founded in 1987 and has offices in London, UK and Atlanta GA, USA.

**Equisys plc** Equisys House, 32 Southwark Bridge Road, London SE1 9EU, UK  
T +44 (0)20 7203 4000 F +44 (0)20 7203 4005 E sales@equisys.com

**Equisys Inc** 30000 Mill Creek Avenue, Suite 335, Alpharetta, GA 30022, USA  
T +1 (770) 772 7201 F +1 (770) 442 5789 E sales@usa.equisys.com



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