

# Hanley Building Society

## Child Trust Fund - workflow solution



[www.thehanley.co.uk](http://www.thehanley.co.uk)

#### Client

The Hanley Economic Building Society

#### Website

[www.thehanley.co.uk](http://www.thehanley.co.uk)

#### Location

Stoke-on-Trent, UK

#### Industry

Financial services

#### Customer profile

The Hanley Economic Building Society, based in North Staffordshire, is one of the top 35 building societies in the UK. The building society has been in business for over 150 years and has strong links with the community. It wanted to maximise the government's Child Trust Fund initiative for the benefit of its clients.

#### Solution and technology

BizTalk Server

InfoPath 2003

Windows SharePoint Services

*"Trinity has done an excellent job delivering a system that met our business requirements, and that was implemented in limited timescales. The initiative will benefit our community and we are proud to offer this service. So far, we have successfully opened a large number of these accounts."*

David Lownds, business systems manager, The Hanley Economic Building Society

### Challenge

With the introduction of the Child Trust Fund, The Hanley Economic Building Society had a requirement for an integrated workflow tool that would enable it to participate in the initiative. Its systems needed the functionality to communicate and execute transactions with the Inland Revenue and be implemented in a limited time frame.

### Solution

We deployed an automated workflow tool using BizTalk, Windows Sharepoint Services (WSS) and InfoPath. The system enables data exchange and communication with the Inland Revenue via the Government Gateway. We defined manual intervention within the workflow allows Hanley to communicate instructions from the Inland Revenue to its users, complete forms using InfoPath and store information in a WSS portal.

By implementing an automated workflow, Hanley is able to participate in the government's Child Trust Fund initiative and serve the needs of the local community. The integrated solution allows

communication and data exchange with the Inland Revenue and with defined manual intervention provides an efficient and effective system.

### Benefits

- Able to participate in important new initiative
- Simple, yet effective system
- Connectivity from back office data to Inland Revenue
- Reduction in information errors from users

The Oaks  
Westwood Way  
Coventry  
CV4 8JB  
+44 (0)24 7642 0100   
+44 (0)24 7642 0111   
[www.tesl.com](http://www.tesl.com)

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