



REDpaper.

From DocFamily to Serie M/

**Assentis replacement with
future potential**

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The Assentis solution is discontinued

Support for the Assentis Business Communication solution with the DocFamily product suite will end at the beginning of 2026. For use within the Swiss banking application Avaloq, support will continue for a little longer. But the fact is: For a timely migration to the successor product, you need to set the course now. As a CCM software manufacturer and solution provider, kühn & weyh Software GmbH (kwsoft®) has already advised and supported numerous companies in these and similar situations. For example, when replacing outdated print and output systems or (recently often) on the occasion of the replacement of the lately also discontinued DOPiX system. The goal was always to replace the outdated systems with the modern CCM solution Serie M/ and, in addition, to optimize corporate communications in terms of quality, efficiency and future viability.

What's next?

Replacing a basic customer communication system — often with several thousand document templates and multiple interfaces to the surrounding systems — always involves a not inconsiderable amount of work. In order not to have to cover this expenditure of time, resources and funds to the full extent with a single project, many companies have opted in the past for a two-stage approach.

Phase 1

Perform a 1:1 migration with as limited effort as possible to ensure ongoing operation. The primary goal is to anticipate any time pressure caused by the end of support. For time and cost reasons, additional optimization measures for upstream and downstream processes as well as for resources are largely dispensed with.

Phase 2

Companies that opt for the Serie M/ CCM solution in phase 1 have already created the basis for all further, future-oriented optimization measures. At a point in time of their choice, they can begin to make their customer conversation smarter and thus fit for current and future requirements. Without external pressure, in accordance with their own IT strategy and the projected time and resource allocation.

Our CCM Migration Service

The experts at kwsoft® have already carried out numerous successful migrations together with our partner companies and have set up their own service for this purpose, the "CCM Migration Service". This means that we can also accompany your company in the financial services sector competently and reliably into the new world of Smart Customer Conversation. As one of only a few providers on the market, we perform a precise analysis of your resources in advance. The tool specially developed for this purpose by our partner semantics has already proven itself in many migration projects, for example in the analysis and conversion of source formats such as MS Word / winBK, DOPiX, ASF/DCF or Papyrus. The evaluation of the collected data provides exact, reliable results regarding the central questions of a migration project:

- How much functionality can be completely transferred to the target format of the M/TEXT TONIC templates by machine migration?
- How much manual rework is required in each case and what percentage of the templates does it affect?
- What is the savings rate of semi-machine migration compared to manual migration? In previous projects, up to 90% could be achieved here!
- Can the number of templates be optimized and reduced due to redundancies etc.?

In this way, we provide you with a secure basis for decision-making so that you can take exactly the optimal, individual migration path for your company. You save yourself a lot of time and hassle because you don't have to rely on approximate estimates and guesswork.

Phase 1 „Safety first“

1:1 Migration from DocFamily to Serie M/

With the support of our Migration Service, you replace the Assentis DocFamily with the Serie M/. This means

- Based on the analysis of the Migration Service, you specifically select the migration path that combines the highest efficiency with the lowest costs for your company.
- 1:1 migration of existing resources with a high proportion of machine conversion, the quality of which is so high in the best case that the templates are immediately ready for use in the target system — including logical control elements.
- Manual rework in the remaining cases that are not completely transferred by the migration tool.
- Upstream and downstream processes remain in place and are connected via interfaces.

Afterwards, you can continue to work with the Serie M/ as usual and take your time to plan any further steps to optimize your CCM. Because with the Serie M/, you have one of the market-leading Customer Conversation Management systems with forward-looking technology in your house. This is demonstrated, among other things, by the fact that even with this "entry-level solution" you benefit from numerous improvements compared to the Assentis DocFamily.

Advantages over the Assentis solution

- **End-to-end document processes for maximum performance and security**
The Serie M/ controls document processes conversion-free, rule-compliant and information-secure from creation to optimization and output. All (meta) data, content and structural information generated during the creation process is collected in a format-neutral base format. This means that at the end of the process, any number of different output documents or shipments can be generated from the one basic document. This is entirely in line with the omnichannel principle on all digital and physical output channels.
- **Central resource maintenance increases efficiency and agility**
All the resources required for document creation can be organized in a hierarchical project structure, so that central elements such as the board bar only exist once in the system and only need to be

changed once when changes are made. In addition, you can also define autonomous clients that work independently of each other with their own resources.

- **Intelligent mapping makes data transfer handling simple and flexible**

Document templates are not rigidly linked to the supplied data, but are flexibly assigned to each other using an intelligent mapping platform. This means that changed or different data structures can be easily taken into account and exchanged without requiring changes to the templates.

- **Connection to professional version management**

Instead of developing second-rate add-on tools ourselves, kwsoft® relies on first-class, stand-alone expert systems that are connected via common interfaces. No matter whether it is version management, monitoring, business intelligence or electronic signatures. This gives you the choice of either connecting your own version management system established in the company. Or you can use one of the proven open source products such as Subversion or GIT for the Serie M/.

- **WYSIWYG while typing in browser-based editor**

When editing, users can immediately see what they are doing and how it will affect the appearance of the final document.

- **High-performance batch and background processing with manageable hardware requirements**

So far, we have succeeded in achieving the desired online and batch performance in every project. We achieve this by optimizing application traffic with intelligent job and caching concepts. Secondly, the applications are implemented in a stateless client-server architecture. This allows you to benefit from reliability and scalability, and to handle high user numbers and document volumes with low hardware requirements.

- **Modern container technology makes the Serie M/ "cloud-ready"**

CCM with the Serie M/ can be operated either as an on-premise solution or on container application platforms (Docker with Kubernetes / OpenShift). With container technology, you can switch to cloud computing at any time and open up further possibilities in the area of scaling/load balancing etc. or in efficient operation as Software as a Service (SaaS).

- **A release upgrade is not a complex project, but "business as usual"**

As a kwsoft® customer, you have the option of upgrading to the latest, functionally and technically enhanced major release of Serie M/ every year in April. This release change is prepared by our development department with corresponding installation routines. This also includes a tool for the largely automated execution of regression tests, so that deviations in the output can be detected and corrected immediately. A release change of the Serie M/ is therefore not an elaborate project, but business as usual.

- **Deployment strategy for easy staging**

Serie M/ also provides suitable routines for the deployment of new/changed resources or software distribution as part of a release upgrade. They support the administrator in deploying the resources to the respective environments such as development, test and production at the defined time.

A practical example

A few years ago, we replaced Assentis at the largest Swiss retail bank. In the course of the strategic orientation towards Java architecture, the specialist application was renewed and the central output management was reorganized and redimensioned. Since then, we have kept the solution up to date with new releases and technological updates.

You can follow this ongoing process of renewal and further development very well in the two reference reports of our long-standing customer Raiffeisen Switzerland. On request, you can also obtain further information or direct contact with the customer.

User report Raiffeisen Schweiz

The company now operates the Serie M/ in container architecture and is therefore cloud-ready. This means that performance can now be increased to around 110 documents or 220 pages per second in PDF format without any significant hardware expansion — and the performance limits are far from being reached.

Phase 2: Migration as an opportunity for optimization

Of course, you can also bring forward urgent optimization measures such as the connection of an additional digital channel etc. at any time and complete them in Phase 1. Or, if capacities are available, you can also carry out migration and optimization in a single project. The specific procedure always depends on your plans and available resources.

Serie M/ gives you the option of upgrading your customer communications to a contemporary, future-proof level in terms of media, content and technology at any time — within the framework of your regular IT strategy. This is possible because the Serie M/ combines over 40 years of industry experience with consistent further development practiced in every release. This is how Serie M/ has evolved into the technologically leading CCM system that gives you all the options you need to conduct high-quality digital, interactive communications with your customers.

By optimizing your CCM processes, resources and formats, you create the conditions for meeting the increasing demands of modern customer communication not only in terms of content and functionality, but also in an economically sensible way. It's all about designing processes and systems to continue to create positive customer experiences in the future and thus drive a successful Customer Conversation. Here are a few approaches that are at the top of our customers' agendas, especially in the financial services sector.

Optimize output management

- Do you serve all analog and digital output channels according to your target groups? Are you taking advantage of all the optimization options? From postage and dispatch optimization to the digital customer portal and casual SMS addressing for younger, mobile target groups in responsive layout?
- Is the CCM aligned with your digitization strategy to convert more and more customers to digital processes in a smooth transition? Does it succeed in addressing them individually on the agreed channels in the right form?

The Serie M/ masters analog operation with cost-optimized dispatch as well as hybrid operation with case-by-case switching of analog and digital channels as well as purely digital operation. For each of these processes, you will find examples among our reference customers.

Optimization of your resources

- Every administrator knows that any reduction in the number of resources makes handling and maintenance easier.
- Redundancies in text modules/templates reduce usability, unused resources cause unnecessary maintenance effort.

As part of our Migration Service, we offer to have our partner semantics analyze, optimize and consolidate your text templates, for example. Often, the targeted use of logical conditions, such as those offered by Serie M/, also allows several text modules to be merged into a single element. In this way, we have often already been able to drastically reduce the number of resources (up to 50%). These measures have a direct impact on the efficient and agile handling of your customer communication.

Updating your customer approach

- Is your content expressed clearly and comprehensively?
- Do you match the language and tone of your customers and target groups? For example, when addressing the younger generation, when preparing content in simple language, or when using gender-appropriate language?
- How well prepared are you for accessibility? Is PDF/UA already a common output format for you?

The more comprehensible the content, the fewer returns and delays in customer dialog. The more your customers also feel addressed in tone, the better the customer experience, the higher the customer loyalty. And accessibility is no longer a leisure activity; the topic is also becoming increasingly important from a socio-political perspective and legally binding in more and more areas. With Serie M/ you master all these topics and our references show how it looks in practice. Take advantage of this experience.

Involvement of the specialist department — time to market

Serie M/ offers an editorial system for content creation and resource maintenance by the specialist department itself. Whether it's regulatory, legal changes, updates or new products, with the "Content Hub" editorial system you make the valuable expertise of your specialist departments available for the communication process immediately and without lengthy coordination with the IT department. Your agility on the market increases enormously and your IT department is relieved.

Shift processes to the digital world

The benefits of end-to-end digital work processes without media discontinuity are enormous — in the back office as well as in dialog with customers.

- The Serie M/ has an interface strategy that allows the CCM system to be seamlessly integrated into the surrounding processes and systems. In this way, automated processes can be established that are system-controlled, secure and fast, from order placement (e.g. through input management) to omnichannel output.
- In the Customer Conversation, delivery time approaches zero, responsive elements such as PDF forms shorten response times, and even the eco-balance improves because physical delivery is eliminated.

Serie M/ comes from the analog world of print pages with postage and shipping optimization etc. But it was geared early on to the requirements of the digital world, e.g. with non-page-oriented, responsive HTML format. This makes it the perfect system to master the transition to the digital world that is currently taking place.

Conclusion

The Serie M/ provides you with a leading CCM solution that enables you to master both the current challenges of a timely Assentis migration and the more far-reaching requirements for customer communication of the future in terms of functionality, technology and organization.

With kwsoft® and its partner companies, you have experienced, competent and reliable solution partners at your side, who offer you the skills you need, in a scope and time frame that you define and in a quality that leaves nothing to be desired.

We are looking forward to being your contact for CCM and barrier-free customer communication at marketing@kwsoft.de.

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We would be pleased to receive further suggestions or comments.

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