

FINANCIAL SERVICES INDUSTRY CHALLENGES

SOLVED

THROUGH INTELLIGENT INFORMATION MANAGEMENT

CHALLENGE

We have paper documents everywhere

SOLUTIONS

- Turn paper-intensive processes into streamlined workflows
- Scan in invoices, purchase orders, HR documents, regulatory and quality documents from anywhere you happen to be
- Integrated scanning with Optical Character Recognition (OCR) to make paper files text-searchable



CHALLENGE

Invoice routing is too Cumbersome

SOLUTIONS

- Streamline the process of cost coding, processing, approval and payment
- Workflows enable the centralization of invoice processing in one place
- Reduce invoice processing from days or weeks to minutes



CHALLENGE

We need employees to have access to documents when they're off-site

SOLUTIONS

- Access documents with a smartphone, tablet or computer from anywhere on Earth
- Scan documents and receipts from anywhere
- Review, approve and eSign documents from anywhere



CHALLENGE

Our data is located in multiple places

SOLUTIONS

- Central repository for documents and files from different silos
- Access, store and manage documents from network folders, CRM, SharePoint, ERP — and anywhere else they might live
- Singular 360-degree view of data from otherwise disparate repositories

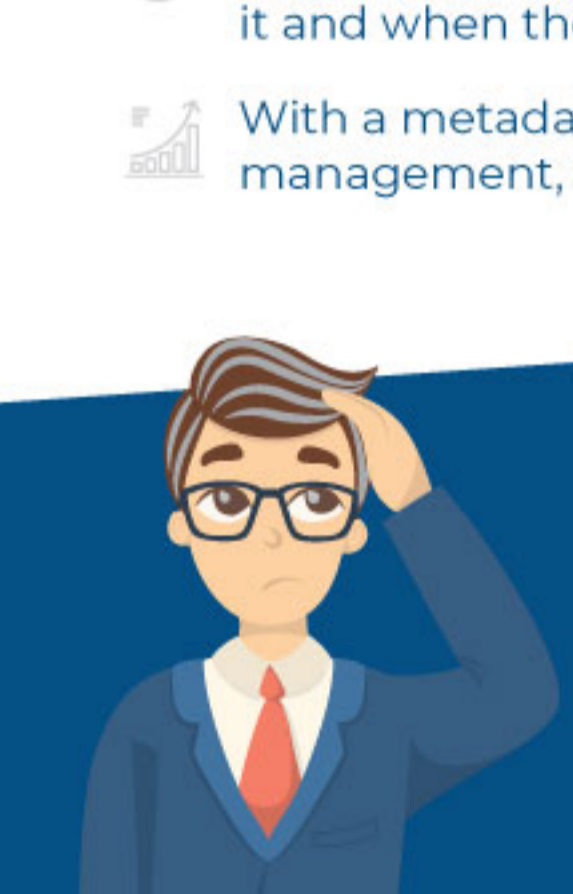


CHALLENGE

Lack of visibility into critical information

SOLUTIONS

- No more endless searching for the information you need — all documents located in a central repository
- Find the right version, every time. It's easy to see what has changed, who did it and when the change was made
- With a metadata approach to data management, easily add structure to data



IIM & THE FINANCIAL SERVICES INDUSTRY

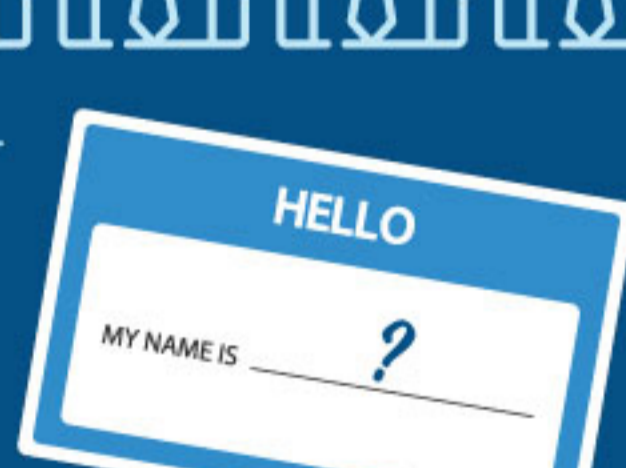
71% of Financial Services employees say it's difficult to reliably find the most recent version of a document.¹

Over half (**52%**) of Financial Services workers have to recreate documents that already exist because they can't find them.¹

92% of Financial Services workers say their job would be easier if they could find a document without worrying about which repository it resides in.¹



71% of Financial Services workers say they are often unable to find documents because they have been poorly named when filed.¹



DIGITAL TRANSFORMATION

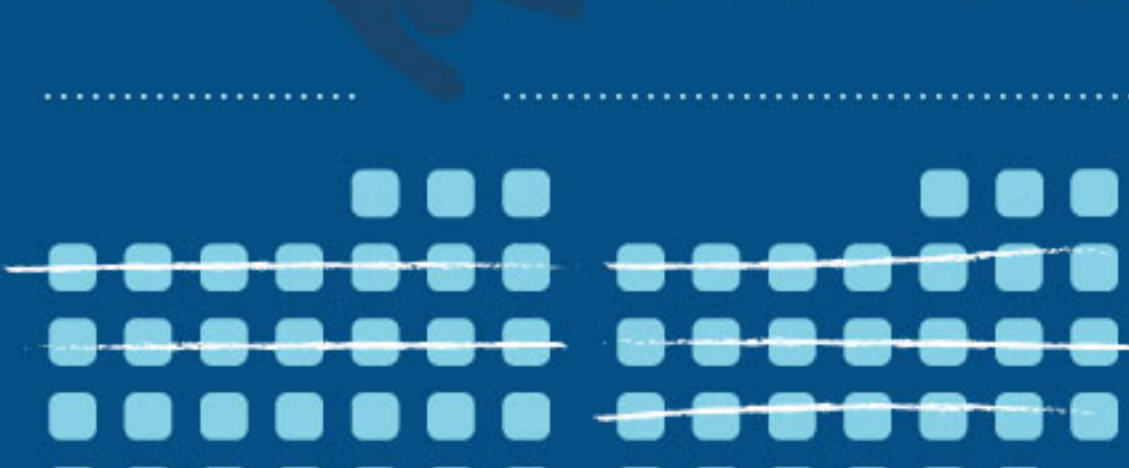
Almost half (**48%**) of top-performing organizations believe they are at least **75%** of where they want to be by 2020 in their Digital Transformation journey. Only **8%** of bottom performing organizations feel similarly.²



86% OF COMPANIES see failure to digitize and standardize (and automate) business inputs as a key transformation bottleneck.²



The average office employee spends **1.5 HOURS PER DAY (or 6 WEEKS ANNUALLY!)** looking for things like paper documents.³



92% OF ORGANIZATIONS believe that something needs to change and that they must modernize their information management strategy.²



¹2019 Intelligent Information Management Benchmark Report
²The State of Intelligent Information Management 2018 ³OrganizedWorld