



## Industry Brief: Investment

The investment services industry is facing numerous challenges when it comes to addressing changing customer preferences. As customers demand more digital options, Investment Management firms are looking for new ways to grow and run their operations more effectively while providing excellent customer service. With **ECMNOW!** your organization can streamline document processing with our patented award-winning artificial intelligence (AI) engine that will improve productivity, save money, and enhance the customer experience.



### EFFICIENCY **NOW!**

- Speed up requests for information and improve customer service by using Intelligent Automation (IA) to search, send, and keep track of sensitive financial data.
- Leverage our AI engine to automatically classify and extract data from your documents to dramatically decrease document processing times.
- Simplify data management by unifying accounting systems and other line-of-business (LOB) applications with easy to use point-and-click integrations.



### CONTROL **NOW!**

- Securely protect personal financial information with document encryption.
- Ensure compliance with federal regulations such as the Gramm-Leach Bliley Act (GLBA) and Sarbanes-Oxley (SOX), making sure protected financial data remains secure.
- Ensure proper procedures are followed and completed within specified time frames to keep processes running smoothly.



### MONEY **NOW!**

- Automate manual, routine tasks with Robotic Process Automation (RPA) and IA by leveraging software robots to decrease operating costs.
- Eliminate hardware and IT costs and turn capital expenses into tax-deductible operational expenses.
- Avoid costly fines with extensive security settings to ensure you maintain compliance with federal regulations.

*"A major shift is taking place in how enterprises select their financial management applications, with a migration to cloud applications happening faster than expected. By 2020, 36% of enterprises will use the cloud to support more than half of their transactional systems of record."*



## What Problems Can *ECMNOW!* Solve?

What if your organization could improve customer services just by implementing one system? Use *ECMNOW!* to digitize, manage, store, and route all your financial documents to improve productivity while securely protecting sensitive information and saving you money on operational expenses.



### Reduce Operating Costs

How much money does manually managing financial and customer documents cost you? Quickly apply RPA to automate routine business tasks. With *ECMNOW!* you can leverage software robots to improve productivity while reducing operating expenses across the entire organization.



### Enjoy the Economic Freedom of the Cloud

Is your organization looking for ways to reduce operating expenses? Minimize IT costs by outsourcing hardware, software, and maintenance costs to the cloud. No capital expenditures mean tax-deductible operating expenses. Plus, unlimited users and data storage means the system automatically adapts as your organization grows.



### Improve Operating Efficiencies

Are you still hand-keying sensitive financial data? Eliminate time-wasting manual data entry and improve the security of your data by leveraging our patented AI engine to intelligently automate your documents. The PaperVision® Forms Magic Technology will classify and extract key information from any kind of document you throw its way—allowing you to focus on more important tasks.



### Exceed Customer Expectations

Are your customers tired of waiting for you to manually locate information? With *ECMNOW!* you can instantly pull up information and securely distribute it electronically. With intelligent automation, searching, sending, and keeping track of data, streamlines processes to improve the overall customer experience.



### Comply with Federal Regulations

Are your files protected in accordance with federal regulations? Under GLBA and SOX regulations, organizations are required to disclose how customer data is protected, shared, and secured. With *ECMNOW!* documents are safely protected and complete audit trails make information audits a breeze, saving you valuable time and money.



### Integrate Seamlessly

Do you work with multiple systems? *ECMNOW!* comes with easy to use point-and-click integrations that make it easy for you to share information with other line-of-business applications, simplifying data management and improving the efficiency of the whole organization.

*"There is so much more scrutiny on file security now. We have many high net-worth clients with a lot of important information in our files. It's important that we have a system our clients can trust. Thanks to PaperVision® Enterprise we know we have a system that doesn't leave files vulnerable to theft or natural disaster."*

- Hawley MacLean, President, MacLean Financial Group

**MFG**

MacLean Financial Group, Inc.

**For a complete product listing and technical information, please visit:  
www.digitechsystems.com or call toll free 866.374.3569**