

Jean's division just processed
one thousand pieces of paper.

And it's only Monday.

Each day, the average financial services company handles thousands of sheets of paper, from letters and statements to contracts and forms. That adds up to millions of paper documents every year.

This mountain of paper represents a source of inefficiency and delays for otherwise agile companies. It can be difficult to find a document, even harder to share one, and impossible to recover one that's been lost. In today's competitive business climate, your institution can't afford to operate with these unnecessary barriers.

Many financial services companies have already turned to Enterprise Content Management solutions to solve this growing paper problem. A streamlined system to rapidly capture, classify, retrieve and report on documents can get your company back in the fast lane. With more than a decade of ECM expertise and a proven track record with financial services clients, Burntsand can deliver the results you want in the time frame you need.

About Burntsand

Burntsand is a technology consulting firm specializing in integrating content, processes and data. For more than a decade, Burntsand has been a respected EMC Documentum partner with proven expertise in Enterprise Content Management. Leading organizations have trusted Burntsand to deliver results-oriented business solutions including document management and scanning, digital asset management, web and portal publishing, publications automation, and records retention. Burntsand delivers optimum time to value and unrivaled customer experience whether delivering an Enterprise Content Management Roadmap, complex integration or product installation. Our consultants work hard to ensure that accountability, leadership, teamwork and trust are the guiding principles of every engagement. With additional expertise in .NET development, Burntsand can help you create intelligent solutions that integrate seamlessly with your business.

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ECM Industry Solutions
Financial Services

Burntsand

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Service

Retaining customers in today's competitive financial landscape means delivering service and support excellence across many touchpoints. Customers demand rapid response to inquiries, more personalized product and service information, and immediate access to their account history. To perform at this level of service excellence, financial institutions must be able to unify widespread data and content into intelligent call center systems and customer portals. With a Burtsand content management solution, you can:

- Allow customers to view transactional documents and data in a self-service account information portal.
- Help customer service representatives respond faster with powerful information retrieval tools.
- Provide support staff with alerts when procedures change or new information is available.
- Support multiple languages or differing regional business practices from a common foundation.
- Centralize call center scripts and product data sheets.

A leading investment firm relied on Burtsand to create a global web communications architecture, allowing them to publish content based on customer profile or regional applicability.

Visibility

If you are subject to an audit, you may be required to respond to regulators in as little as 48 hours — an aggressive turnaround time even if you know where to find key files. Storing transactional documents in paper form means inflated compliance costs and reduced responsiveness for most organizations. With a system that allows you to rapidly retrieve records and the communication surrounding them, your institution can reduce its exposure as well as its costs. A document management solution can help you:

- Reliably store original documents and all relevant versions for a mandated time period.
- Retain supporting transaction records and correspondence, including email messages.
- Capture signatures from customer processes.
- Ensure that approval trails are auditable, making the history of a document or decision clear.
- Archive or destroy documents based on retention policies.
- Enable management reporting across repositories.

“We chose to partner with Burtsand because of their demonstrated track record of providing world-class solutions to an impressive list of clients.”

COO, Leading Insurance Company

Efficiency

Streamlining paper-intensive tasks can mean significant savings in operating costs. An ECM solution can help to reduce costs associated with processing errors, physical document storage, and indexing and filing requirements. In addition, it can help streamline repetitive publishing processes such as procedure authoring or marketing data sheet creation. With content management, you can:

- Speed the creation of contracts and procedures, allowing reuse of standard clauses and templates.
- Publish product information to multiple channels, including data sheets, web sites and portals.
- Streamline back-office processes such as application review or claims processing.
- Integrate electronic storage with fax or print services.
- Enable account team collaboration for faster, more transparent decision making.
- Accelerate trade confirmation processes (STP).
- Enable parallel approval workflows in loan origination and risk assessment.

Burtsand helped one large bank save nine months' worth of publishing costs by moving to an electronic disclosures system.

Insurance Solutions

- Claims processing and management
- Policy and procedure authoring
- Underwriting contract management
- Billing records and customer correspondence
- Account team collaboration

Banking Solutions

- Loan origination and form handling
- Call center knowledge management
- Product data sheet publishing
- Back office process automation
- Web and portal management

Investment Solutions

- Prospectus publishing
- Analyst research report authoring
- Straight-through processing (STP) of trades
- SEC compliance management
- Disclosure automation

**Not sure how to get started?
Ask us how an ECM Roadmap can help.**

Burtsand

