

Self service solutions are changing the way you manage relationships outside of your organization.



Making document management simple and affordable for organizations of all sizes.

IS Docs
1705 Industrial Park Road Columbus, MS 39701
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By streamlining the way you interact with customers and vendors your financial institution can save time and money while being prepared to meet regulatory mandates.

Most industries, when faced with the challenge of accomplishing more with less, have resorted to customer-empowerment initiatives. As customers, we now do our own banking, pump our own gas, buy our products online, check ourselves in for airline boarding using on our phones and check out at the grocery store. These examples allow those providing services to use human resources more efficiently, contributing to increased worker productivity.

In most cases, the advent of these strategies was viewed with concern, but now all are almost universally viewed as improvements. When you apply this automation to your process for completing events or gathering information using a form, sharing a document, assigning a training video with a comprehension quiz, or requesting documents from a customer you can expect to reduce cost, become more scalable, and improve overall quality. With docMgt these processes become repeatable, predictable, reportable thus reducing your risk.

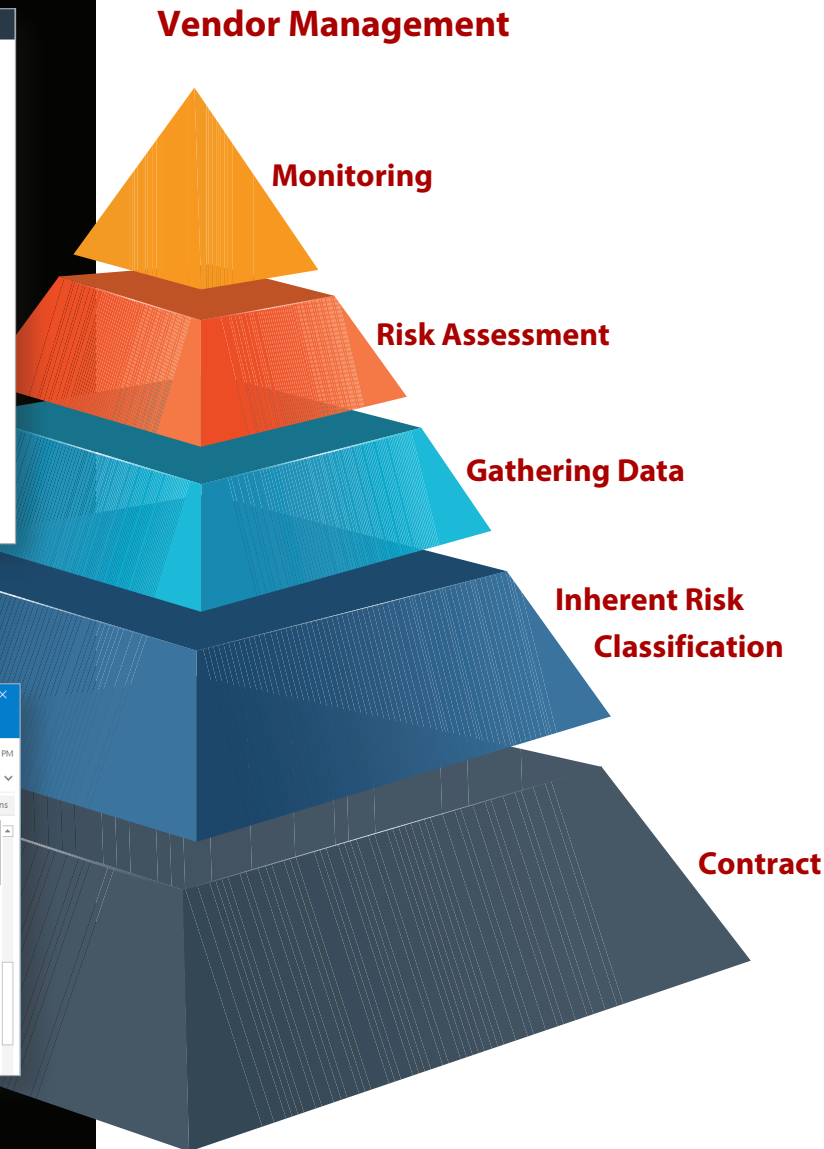


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Easy to design forms automate the way Vendor Due Diligence is done.

Required forms and document requests can be sent to secure portals, tracked to completion, and routed for review and approval.

Vendors and customers can view their progress in completing required assignments.



Vendor Management

Monitoring

Risk Assessment

Gathering Data

Inherent Risk Classification

Contract

Stay ahead of regulatory compliance and your competition with IS Docs.

Contact us to learn more about our solutions and how you can start saving time and money today!

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A single, interconnected solution, that provides:

- Self-service technology allowing client interaction through a secure user portal interface
- Innovative technology built with an easy to use administrative interface
- Automation includes identification, measuring, monitoring and controlling risks
 - Automatically distribute forms
 - Automatically distribute user requests
 - System generated reminders of past due assignments
 - Controls to manage required document and information request
- Workflow business rules to ensure internal staff oversight
 - Alerts for internal staff of past due assignments
 - Workflow automation that gets the work to the right staff at the right time
 - Event management to tailor your requirements based on risk

Typical improvements include:

- Automatic distribution of forms and document request to secure portals.
- System generated reminders when assignments become past due.
- Alerting of internal staff of past due items that need additional attention.
- The use of business rules to automatically send documents, forms, or requests.

Typical use cases where self-service technology applies:

- Commercial customers - inventory management, financial analysis, monitoring and training
- Vendor management – annual due diligence requirements including financial analysis, certifications of insurance updates, SSAE16 audit reports updates, business continuity and business resumption plan updates.
- Policy Management – monthly board of director reviews, annual employee attestation
- Board of Directors – monthly distribution of BOD materials, policy approval and attestation