

# Hyland's financial services solutions: NAVIGATE YOUR DIGITAL JOURNEY

Financial services organizations are faced with an increasingly complex and aging technology infrastructure that doesn't provide speed and flexibility for fast-changing market conditions. How can you navigate your digital transformation journey while meeting the increasing demands of the digitally connected consumer?

Forward-thinking financial firms are turning to modern content services platforms that increase efficiency, reduce risk, lower costs and improve customer satisfaction.

**“We created efficiencies, increased accuracy and lowered costs through structured processing. This allows us to continue to move quickly to provide great service to our members.”**

**Heather Lally**  
Vice President of Operations  
Alliant Credit Union



## You need to:

- ✓ Empower employees with the right information to deliver exemplary customer experiences
- ✓ Provide a complete view of data and documents for informed decision-making
- ✓ Streamline and speed processes for lending, new accounts, compliance and account maintenance
- ✓ Reduce legacy infrastructure and modernize to the cloud for agile, flexible content delivery

Whether you are looking for a low-code and easily configurable solution or an open-source and cloud-native option for a custom build, Hyland can help. We've got the technology and experience to support your content management goals with Hyland's OnBase or Alfresco Digital Business Platform.

We know that the value of your content comes not from storing it but from using it to move your organization forward. We work tirelessly to create transformative process and content management solutions that will help you drive greater insights and effectiveness on your digital journey.

“ We can meet the business requirements, have a faster turnaround and can easily take on new challenges because we know we’ve got Alfresco backing us up.”

**Ruchi Saraswat**  
Director, Global Head of Tax Operations  
RBC Capital Markets



## LENDING

With increased competition and a digital-savvy borrower, customer experience has never been more important. Whether a bank, credit union or non-traditional lender speeding the entire loan process is critical — from origination to delivery to servicing.

### With Hyland, your organization can:

- Centralize all loan documents and data in a single application
- Easily capture, manage, store and securely share lending documents and data
- Gain visibility by monitoring and reporting on key processes and workstreams
- Proactively alert loan officers of required or missing documents
- Automate steps and build in business rules that identify and escalate complex tasks



## NEW ACCOUNTS AND MAINTENANCE

Customers have more options than ever before. Therefore, every interaction must be handled with the same accuracy, efficiency and courtesy whether it’s for a simple address change, new account setup or complex investment advice.

### With Hyland, your organization can:

- Enhance the onboarding experience and avoid customer frustration of repeated form-filling
- Make critical account information available to your customers securely wherever it is needed on any device or channel
- Boost the efficiency of your customer service team and shorten response times to your customers



## COMPLIANCE

The state of regulatory compliance in financial services is ever-changing, high stakes and complex. Adhering to regulations can be time-intensive and non-compliance can result in significant fines.

### With Hyland, your organization can:

- Consolidate documents in one location, mitigate access control risks and enhance visibility into processes
- Automate document retention to provide consistent disposition
- Easily share audit logs with external auditors via a secure website. Avoid costly penalties and ensure compliance standards are met.
- Increase agility to quickly and easily adapt to changes in regulations



Lending



Compliance



New accounts



Operations



Account maintenance



Customer experience

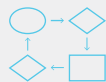


Shared services/back office



### HYLAND CONTENT AND PROCESS AUTOMATION

- » Intelligent capture
- » Content management
- » Process automation
- » Collaboration
- » Customer communication management
- » Case management
- » Reporting and analytics
- » Enterprise search
- » Retention and records management



#### Core systems:

Lending, Banking, Wealth, Customer Portals, CRM, GL



#### Key integrations:

Corelation, Jack Henry, Encompass, Salesforce, Workday and more

“I don’t have to end my call with a customer and call back. Having access to the documents in OnBase saves a lot of time.”

**Paul Koch**  
AVP of Commercial Lending  
Civista Bank

### ADD NEW VALUE TO EXISTING SYSTEMS

Hyland’s content services integrate with core banking and lending systems like Jack Henry, Corelation and Encompass LOS. With integrations, you can reduce IT demands and empower your employees with needed information that’s delivered within their familiar core system interface. In addition, Hyland seamlessly integrates with leading enterprise systems like Workday, SAP, Salesforce and others.

### DISCOVER HYLAND

Hyland accelerates the digital strategy for financial services institutions by unlocking the value of content — inside and outside of core systems. Secure, cloud-based content and digital process automation solutions from Hyland enable greater collaboration and more efficient operations. More than 3,500 financial institutions leverage Hyland solutions to drive digital transformation, ensure regulatory compliance and improve omnichannel customer experience.

Hyland has provided content services solutions to financial services organizations for almost 30 years and is a recognized leader by Forrester for content services platforms.

Are you ready to advance your digital journey?

Learn more at [Hyland.com/FinancialServices](https://Hyland.com/FinancialServices)

