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# Banking & Investment

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Banking is the most reputable, long-standing and important of all financial institutions.

Some of the main responsibilities of banks include: offering investment advice, issuing credit cards, settling payments, lending money as loans, financing projects, raising capital and revolving credit.

Due to the prestige and power attached to banking sector, it is very important for banks to provide quality services and products that are not only profitable for them but also for their customers.

## Challenges

Offering value for money

Personal relationships

Reducing paperwork



## *What are the challenges within the banking and investment industry?*

Given the current economic scenario, it is very important for the banking and investment sector to offer a lot more than they have been offering, which makes business and management challenging for them.

- **Offering Value for Money**

It has become incredibly important for banks to offer value for money. And they can offer value for money, only if they are able to control costs within the organization and improve overall efficiency.

- **Personal Relationships**

With a customer-base of 500 to 50,000, it cannot be easy to know all customers on a first-name basis and remember their birthdays and anniversaries. However, looking at the current scenario, personal relationships seem to be need of the hour.

- **Reducing Paper**

Banks and paperwork almost go hand in hand but many banks are taking initiatives to go paperless and create green offices.



### Solution

Incorporating technological solutions that improve efficiency within the organization and relations with customers

### *Think about it...*

Are you working hard or working smart?

Do you have all information at fingertips?

Are you meeting regulatory and compliance requirements?

Banks and investment banking firms need to polish their people and technological skills, so as to please the 21<sup>st</sup> century customer. Apart from securing important records and avoiding data thefts and other frauds, banks also need to be at the top of their game to survive in current financial crisis.

### *How can Document Management Software help?*

Document Management Software does much more than manage documents. This software can help various banking processes by streamlining various activities and documents, thereby improving efficiency and allowing banks to offer better solutions and services.

Docsvault, our flexible software, can be incorporated in banking and investment firms of all sizes and types.

### *Docsvault: Incredibly Flexible Document Management Software*

Docsvault is the perfect Document Management Software for banking and investment sector because of its incredibly flexible features that can suit big as well as small banks and investment firms.

Docsvault can help banks and other financial institutions to meet some financial and technological challenges head on. From reducing costs of paper by integrating scanning and saving time by organizing data structure, Docsvault is an invaluable tool for these institutions.

Some features that will be especially useful for banks and other financial institutions are:

### Who is using Docsvault?

Erste Group Bank AG, Austria  
Pacificbanc Mortgage, United States

Acer Investment Group,  
United States

Bancroft Private Equity LLP,  
United Kingdom

*"I can't tell you how impressed I am with your application. After only an hour or so, it is an integrated part of my work stream."*

- Alan Ehrlich

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DMS for everyone

To get more details about Docsvault, email us at [sales\[at\]docsvault.com](mailto:sales[at]docsvault.com)

Call us at 888.819.3035

- **Scanning tools**

Scanning tools and add-ons such as OCR, real-time image viewing, predefining different types of scan criteria suitable for different jobs, PDF, flexible document separation and image quality improver make scanning with Docsvault a breeze.

- **Metadata and Tagging**

You can get set document profiles, associate index values and tags and create profile templates for all your paper and electronic documents. This means you can find and retrieve all your documents within no time at all.

- **Audit trail**

Audit trail allows you to keep a watch on all activities pertaining to documents taking place in your repository. From the time, a document is created through to modification, deletion or exporting, you can find out what exactly is being done with your documents.

### **Other benefits**

- ✓ Manage documents and streamline processes
- ✓ Retain unlimited versions of documents with version control
- ✓ Backup and restore data for meeting regulatory compliance
- ✓ Improve efficiency of employees with smarter collaboration