

Financial Services Workflow Automation & Document Management

FINANCIAL SERVICES DOCUMENT CHALLENGES

While electronic applications are increasingly common, processing paper credit card and loan applications is still a headache in large volumes, typically over 1,000 per month. Yet processing them efficiently is crucial to new customer on-boarding and the lifeblood of any bank or credit union, and your process and document availability must hold up to regulator scrutiny.

We offer workflow automation and document management solutions to streamline the credit card and loan application process, along with call center services to reduce the burden of managing exceptions.



FOR MORE INFORMATION CONTACT:

marketing@metasource.com

www.metasource.com

(888) 634-7684

WORKFLOW AUTOMATION & DOCUMENT MANAGEMENT

Benefits of our Workflow Automation Solutions include:

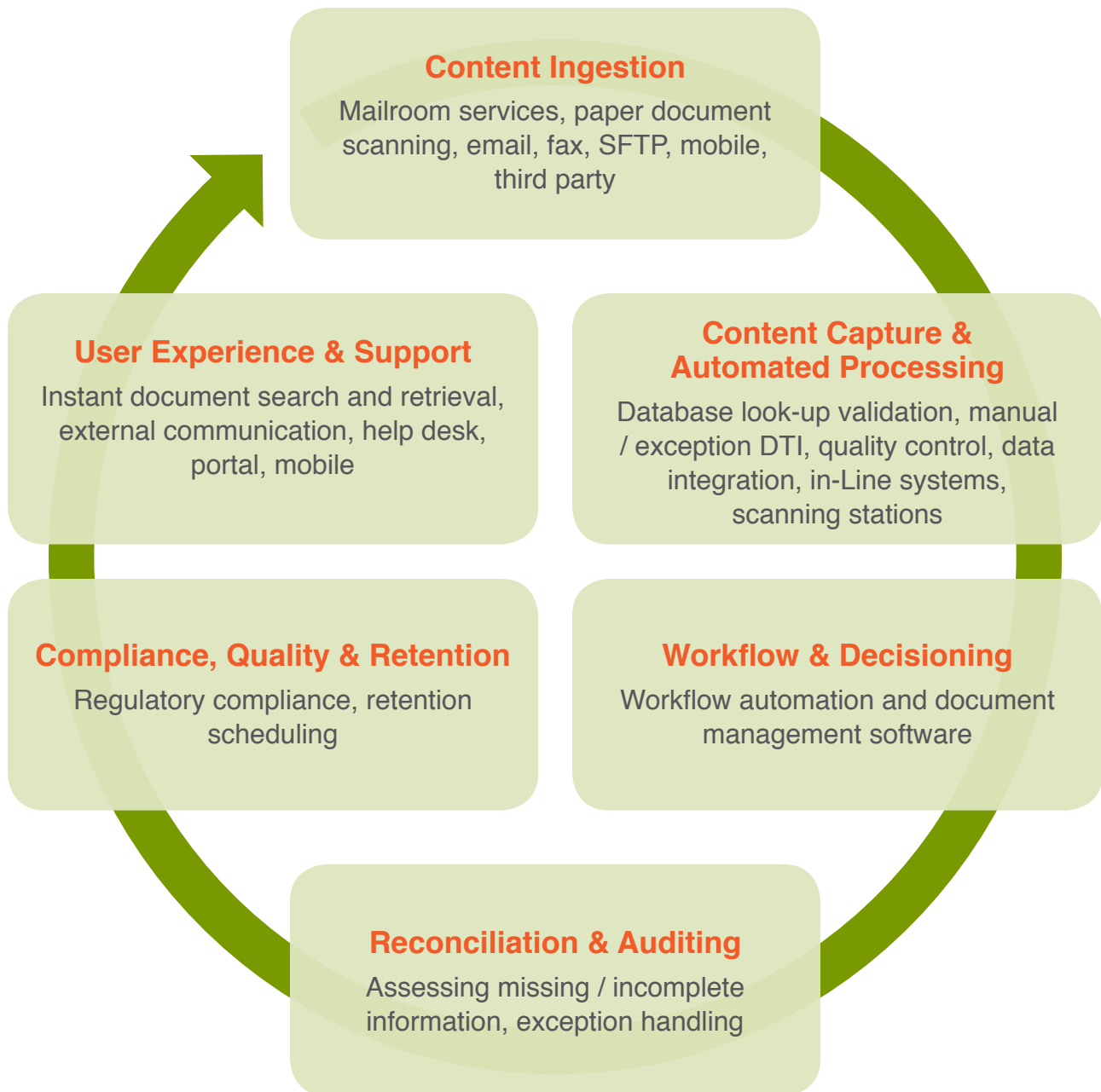
- Increasing credit card and loan processing productivity by 100%
- Reducing internal processing errors 75%
- Decreasing the time to resolve application mistakes by 70%
- Creating competitive advantages in credit card and loan turnaround time and customer service

ACHIEVE THE NEXT LEVEL

Contact us to learn how some combination of the following will streamline the applicant process:

- Virtual mailroom outsourcing
- Document scanning services
- Document capture & e-form software
- Workflow automation software
- Document management software/cloud
- Call center outsourcing
- Mortgage origination & servicing QC audits (see our Mortgage Solution Sheet)

There are six components of our Financial Services Workflow Automation & Document Management Solution:



About metasource

From automation to outsourcing, our workflow and compliance solutions enable you to focus on your core business – we'll do the rest. MetaSource is a technology driven provider of Business Process Outsourcing (BPO) / Business Process Management (BPM) services integrated with Enterprise Content Management (ECM), workflow solutions and customer experience processes to meet our clients' goals and objectives. We service a variety of industries for a national clientele through our global network of PCI Level 1 / Version 3 certified, SOC / AT 101 Type II (formerly known as SAS70) and HIPAA compliant processing centers, employing over 1,000 employees worldwide.