



neocol 

Delivering Compliance
for Corporate Content
in Financial Services
with Industry Guest facilitator



■ Introductions

■ Setting the Scene

■ Round table session

Introductions



■ Lawrence Paterson – Neocol

■ Industry Expert- Facilitator

- Aon
- RSA
- Mitsui Sumitomo
- Head of Operations
 - London & Bermuda
 - 16 Countries
 - Solvency 2 expert
- Venture Capital Company
 - Business Innovator
- All about experience, share & guide

■ Phil Matthews

■ Round the room...



- International IM Consultancy

- Experience deep and wide:

- Marsh, HSBC, Standard Life, Talbot Underwriting, Miller, HCC, Toyota FS

- Reputation is as a trusted advisor

- Risks and rewards (ROI) of your IM strategy - INSight
- Process, ECM, Capture, Archive
- Vendor-agnostic second pair of eyes
- ‘Sustain & Maintain’ Technical Assistance and support
- Hosting/Cloud Offerings – N-SaaS



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Setting the Scene

■ Evolution of ECM:

- Companies, & Individuals are No longer an Island
- Neither are the supporting technologies
- No longer driven by space/storage/rigid process requirements

■ NOW

- Leveraging the data intelligently, and as an asset
- ALL information, Interconnected, critical, weighty

■ Requires:

- Holistic
- Collaborative
- Management of structured and unstructured data
- Filtered & personalised retrieval – Content Analytics
- Remote, mobile, email, Web, portal
- Advanced Case Management to wrap it all up & deliver it

■ WHY?

- Speed / Competitiveness/Focus
- Increasing demands for instant reporting & demonstrable Compliance
- Information Oceans, not Islands

■ DON'T FORGET


- These are business tools – If Squirrels can do it?

The Needs... and (some of) the answers

Compliance (S2/B2/FSA/SEC...)	Competitiveness	Technology	Business Assistance
Organisation wide/ across whole Information estate/ End-to-End Processes	Reduce overlap/errors Increased Efficiency, Increased Capacity	Capture, OCR/ICR, ACM, ECM, Legal Hold, Archive, Mobile	Process Review, Content & Process Rationalisation, Implementation, Support
Increased Reporting	Cross-sell, Upsell	Capture, OCR/ICR, ACM, ECM, Legal Hold, Archive	“
Increased Detail	Personalisation	ACM, Content Analytics, OCR/ICR	“
Constantly Changing		ACM, Collaborative	“
Personal Responsibility		Legal Hold, Email archive, HSM	“
New offerings - ensuring compliance	New business channels New business lines FS Marketing	Social Content Mgt, Collaborative, Analytics, ACM, ECM, Capture	“



Why it matters?

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- Look first at the business, then the technology:
 - £1.5m+ year on year savings by repurposing a client's existing Information management solution
 - x30 scale-up in client servicing volumes using client's existing technologies
 - Redeployment of 50+ skilled FTEs from non-revenue generating roles to higher value customer-facing activities, without the need for further technical solutions
 - Information Management reviews:
 - 800% RoI on planned IM strategy for Fortune 500 Co.
 - 226% RoI, Payback over 14m for Japanese Bank IM solution
 - ECM & supporting IM Systems Implementations:
 - Improved efficiencies in Underwriting System through use of supporting technologies – Talbot Underwriting
 - Complete Migration of HSBC Insurance book to new (Neocol) hosted environment for Marsh, in weeks

"Neocol took the time to understand what we needed, and their approach to us gave us the most confidence that they could deliver what we wanted". Talbot Underwriting

Agenda



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ROUND TABLE

