

Document *Agility*



Creating Complex Documents for Business Transactions

Challenges of Complex Documents

Large organizations generate significant volumes of business transactions. As customer requirements and government regulations escalate, these transactions have become ever more complex. The process of initiating them, capturing the business data to record them, and memorializing them in required contracts and documentation has become a critical challenge.

Organizations often struggle to initiate complex transactions in an organized, collaborative way, so that the business data collected in the process is reliable and the intent of their business transactions is accurately reflected in the required documents.

A Flawed Process

Organizations are most challenged when the transactions themselves or the required documentation is lengthy, logically complex, customized, highly regulated, and continuously evolving.

The processes used by most organizations to initiate and memorialize complex transactions are fundamentally flawed. Complex transactions require flexible, collaborative processes to capture them, however most processes are unorganized and only loosely connected to other business systems. They are often initiated using manual checklists, spreadsheets or other methods, and may even begin with legal experts manually word processing required documentation first in

order to capture business data. Even when more automated methods are used, they are generally not flexible enough handle the complex logic and team collaboration inherent in most complex transactions.

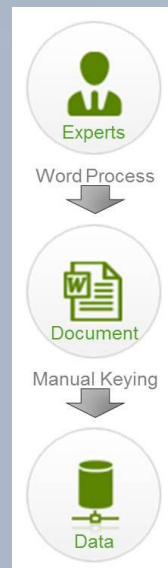
The Right Tools

Document Agility's rules-based approach to initiating and memorializing transactions provides organizations a set of tools that is flexible and powerful enough to initiate and memorialize complex situations.

Document Agility first converts an organization's storehouse of document templates, clauses and other knowledge into automated rules templates and interviews. The system then presents these collaborative, intelligent interviews to users to capture transaction data at the point of origination. The system then creates accurate and compliant documents directly from the collected transaction data using the automated rules templates. All data captured in the process is available for reporting and data integration to other business processes and systems.

This suite of tools ensures that even the most complex

Typical Document Creation Process



transactions are initiated and memorialized in a way that ensures high-quality, reliable data without fragile and costly manual review – while also ensuring that required documentation accurately reflects the intent of each business transaction.

Faster creation and lower costs

Rules-based transaction initiating and memorializing will increase your efficiency and lower your processing costs. Your organization can distribute the workload of initiating transactions to teams that can more easily collaborate. At the same time you can reduce your reliance on scarce legal resources, since required documentation can be driven by stored legal and business rules, eliminating the need for multiple levels of manual review.

invoked to construct legally compliant documents from the data collected.

Document Agility can accommodate just about any collaborative, team-driven and mobile-enabled interview workflow an organization wants to establish. For example, a sales team could enter initial data on mobile devices at the client site, then a processing team could enter additional data, and later a managerial group could review and approve the collection process. Finally a contracts team, could generate the required documents and contracts to memorialize the transaction.

Throughout the initiating and memorializing process, each step is recorded, and historical versions of all data sets recorded and documents created are maintained.

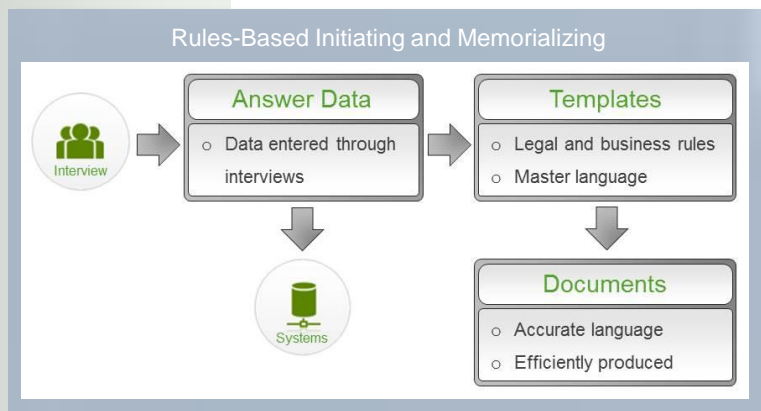
The transaction data captured during the initiating process can be used in a variety of ways within your organization. Use our built-in reporting suite to create and view custom reports and dashboards to find new opportunities, deliver management insights, and spot potential issues before they happen.

Our solution allows data collected through interviews to be integrated with other business systems, without the effort of manually re-entering it or the risk of data entry errors. It also allows this data to be used to programmatically create new documents for an entire client base - in hours instead of weeks, and with no manual processing.

Get Started

Document Agility can transform the way your organization initiates and memorializes complex transactions. Our solutions are designed to provide rapid return on investment.

Contact a member of our sales team for more information on how rules-based initiating and memorializing can help your organization.



How it Works

Our consultants work with your organization's legal, business transaction, and other staff to capture their knowledge into sets of customized business interviews that will capture transaction data and sets of rule templates that contain master document language as well as the legal and business rules that govern the logic of data capture and document creation.

As your functional teams answer questions about each given transaction, business rules are invoked and interviews dynamically adjust to ask required information. Later additional rules are

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