



Elevate® Archiving for Financial Services

Preserve, search, and retrieve your communications

ELEVATE + ELEVATE ARCHIVING

Cloud Communication for Financial Services

In the financial industry, effective and secure communication plays a critical role in the timely and accurate exchange of information among employees, clients, and other stakeholders. Efficient communication can enable faster decision-making processes and enhance operational efficiency and client service.

Elevate brings together various communication tools such as voice, chat, SMS, video, and file sharing into a centralized system, helping facilitate seamless collaboration across channels and enhancing client service.

Importance of Communication Archiving

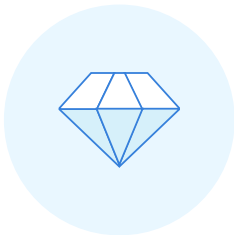
In the fast-paced and highly regulated world of the financial industry, effective communication and record-keeping are paramount. Advancements in technology and diversification of communication channels is reshaping client communications and the impact of industry regulatory requirements. By ensuring a comprehensive and secure record of all chat, SMS, and voice communications, financial institutions can meet compliance requirements, mitigate risks, and enhance transparency. That's where Elevate Archiving can help.



COMPLIANCE AND RISK MANAGEMENT

In the financial industry, regulatory requirements are increasingly enforced, meaning that financial firms need a solution to proactively address compliance that may require the retrieval of communications dating back further than anticipated. Implementing archiving now helps avoid the risk of exposing your organization to regulatory penalties and reputational damage in the future.

Elevate Archiving capabilities help support SEC, FINRA, and includes optional WORM tamper-proof storage to comply with SEC rule 17a-4. Archiving these communication channels enables monitoring and surveillance to identify potential compliance breaches or unauthorized activities, helping maintain a culture of compliance within your organization. Role-based access control (RBAC) enables granular permissions for authorized personnel who can access and manage archived communications, enhancing data security and privacy. Additionally, the solution allows you to generate accurate and timely reports for regulatory bodies when needed, easing the audit process and increasing productivity.



KNOWLEDGE MANAGEMENT AND CLIENT SERVICE

Archived communications contain valuable insights into client preference and historical information that can be used to strengthen client relationships and deliver enhanced service. Archived knowledge can be leveraged to provide personalized and tailored solutions, ultimately improving overall client experience. Additionally, archived communication records can serve as valuable training resources for new employees, showcasing examples of successful client interactions or resolving complex situations. Elevate Archiving enables knowledge sharing within the organization, helping foster professional growth and enhancing service quality.



eDISCOVERY AND LITIGATION SUPPORT

When legal disputes arise, obtaining a comprehensive archive of relevant communications helps in building a stronger case or defending against claims. Elevate Archiving's search and retrieval capabilities allow quick access to specific conversations, enabling administrators to gather evidence, identify relevant information, and establish timelines. By facilitating powerful contextual search processes, Elevate Archiving can save your firm's time and reduce costs associated with manual data collection and review, bolstering its litigation support capabilities. The legal hold feature provides the ability to group and preserve specific communications relevant to ongoing or potential legal matters, reducing risk of data loss or corruption. Additionally, these features can help address internal disputes quickly and efficiently through reviewing internal correspondence in its original format.



A SOLUTION YOU CAN TRUST

Elevate Archiving can significantly enhance the way your financial services firm leverages its communications. Contact us today to learn more about how Elevate Archiving can help your financial services firm thrive and grow.

QUESTIONS? CONTACT US TODAY!

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