Nautilus® Efficiency Manager

Nautilus Efficiency Manager from Fiserv features content-enabled process automation applications designed specifically for departments within your organization. With Nautilus Efficiency Manager, your organization could realize efficiency gains of 30 percent or more.

Nautilus Efficiency Manager incorporates document- and task-tracking (similar to case management) to streamline departmental processes, making the enterprise more efficient and profitable. The preconfigured applications within the solution leverage a common technology framework, deliver a familiar interface to your knowledge workers and more effectively maintain compliance and manage risk by streamlining enterprise onboarding, maintenance, quality and tracking tasks.

Nautilus Efficiency Manager is digitizing and automating each department:

**Accounts Payable – Automated Invoice Processing**

Automate, streamline, standardize and provide transparency to the complete invoice receipt, review, approval and payment process. This full-featured solution provides operational efficiency, enhances record-keeping and delivers immediate return on investment.

**Lending – Loan Portfolio Tracking**

Provides simple and efficient access to digitized customer loan data, documents and other content in a consolidated view. This user-friendly interface is easily accessed from any location, so tracking loan portfolio content for all channels and types of lending (commercial, consumer and mortgage) is simple and convenient.

This centralized repository ensures up-to-date information delivery, allowing your business to save valuable time, money and resources originating and delivering profitable loans to your customers. Experience the ability to automatically track required loan documents and reports, maximizing your borrower’s experience through minimized processing time.

**Deposits – Facilitated BSA/CIP/KYC Compliance**

Ease the burden of complying with the Bank Secrecy Act (BSA), Customer Identification Program (CIP) and Know Your Customer (KYC) by streamlining the identification, collection, tracking, notification and storage of required information and documentation. The application delivers operational efficiency, strengthens record-keeping and ensures transparency. The result is a simplified account
error-prone, paper-based processes with electronic forms for upfront customer profiling and product setup. The solution’s workflow process provides electronic touchpoints for bank personnel (such as sales, operations and management) and commercial customers. Collaboration tools and accessibility options speed the completion of functional tasks. The solution supports all treasury management products and services.

**Vendor Management – Improved Vendor Relationships**

Organize and automate both the vendor onboarding and contracting processes to shorten cycle times, minimize risk, and improve relationships. With case management, a common interface is used to access specific content, take appropriate actions and complete required tasks associated with due diligence of the vendor and/or life cycle of a contract. Better purchasing decisions are made with strategic vendors in the context of a negotiated, comprehensive agreement.

**HR – Improved Associate Experience**

Effectively manage the complete employee life cycle. By streamlining the associate onboarding and retention processes – and keeping information secure – the Human Resources Department provides better service, reduces costs, strengthens compliance and accelerates productivity.

**Asset Management – Tracking Physical Assets**

Easily manage the stock of physical assets (such as credit cards, account welcome packets, etc.), reducing costs, lowering risk and improving client satisfaction. The solution tracks requests, status and inventory; provides dashboard reporting; and defines escalation with notification.

**Wealth Operations – Streamlined Account Management**

Improve client satisfaction by managing all document-based functions for account opening, maintenance and transaction processing – including purchases, deposits and asset transfers. Wealth management, trust companies and private investment firms can automate internal operational and sales processes to improve client service, onboard clients faster, accelerate transaction processing, and enhance management oversight and compliance capabilities. The result is improved acquisition and retention of high net-worth clients, as well as better operational efficiency with reduced costs.

**Reg E Disputes – Enhanced Dispute Resolution**

Simplify and expedite the administration of disputed electronic transactions (debit card, ATM, ACH and remittance transfers), promoting more structured fiscal and compliance policies from a single, integrated platform. The application delivers full-featured case management designed to boost operational efficiency, enhance record-keeping and strengthen internal controls. The result is simplified dispute management that streamlines your operations while elevating the customer experience.

**Commercial Onboarding – Automated Treasury Management/Business Banking Enrollment**

Automate the commercial customer onboarding process, replacing inefficient,
Audit – Managing Audit Activity

Streamline the audit process by automating the following: identification and collection of required documents; preparation of the audit plan through a securely stored library of previous audits; scheduling of meetings or fieldwork; drafting of the final report; and presentation of results. Planning, execution, reporting and follow-up phases of an audit are achieved more effectively and less disruptively through digitization, tracking and collaboration.