
Efficiency Manager

Automate and Digitize Processes to Eliminate
Repetitive Tasks and Create a Standard
Methodology Across Your Enterprise

Efficiency Manager from Fiserv features content-enabled process automation designed for specific departments within your financial institution. With Efficiency Manager, your bank or credit union can realize efficiency gains of 30% or more.

Efficiency Manager incorporates document and task tracking (based on the principles of case management) to streamline departmental processes that are unique to financial institutions. The preconfigured applications leverage a common technology framework and deliver a familiar interface to your knowledge workers. The solution also maintains compliance and manages risk more effectively by streamlining onboarding, maintenance, quality and tracking tasks. That eliminates guesswork and makes your financial institution more efficient and profitable.

The purpose-built Efficiency Manager applications can digitize and automate key processes across your enterprise:



Accounts Payable – Workflow

Streamline, standardize and give transparency to the entire invoice receipt, review, approval and payment process. This solution offers operational efficiency, enhances record keeping and delivers immediate return on investment.



Lending – Loan Tracking

Gain efficient access to digitized customer loan data, documents and other content in a consolidated view. The user-friendly interface is easily accessed from any location, so tracking loan content for all channels and types of lending (commercial, consumer and mortgage) is simple and convenient. Take advantage of the centralized repository to ensure up-to-date information delivery, enabling your business to save time, money and resources in originating and delivering profitable loans to your customers. Automatically track required loan documents and reports, and enhance your borrower's experience through reduced 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, with improved record keeping and transparency. The result is a simplified and compliant account onboarding and maintenance experience that enhances the customer experience.



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 and efficient case management that enhances record-keeping and strengthens internal controls. Its simplified approach to dispute management streamlines your operations while elevating the customer experience.



Commercial Onboarding – Treasury Management/Business Banking Enrollment

Automate the commercial customer onboarding process, replacing inefficient and error-prone paper-based processes with electronic forms for upfront customer profiling and product setup. The workflow process provides electronic touchpoints for bank personnel (such as associates in sales, operations and management) and commercial customers. Collaboration tools and accessibility options speed the completion of functional tasks. The solution supports most treasury management products and services.



Vendor/Contract Management – Improved Vendor Relationships

Organize and automate the vendor onboarding and contracting processes to shorten cycle times, minimize risk and improve relationships. 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 using strategic vendors in the context of a negotiated, comprehensive agreement.



Wealth Operations – Streamlined Account Management

Improve client satisfaction by managing all document-based functions for account opening, maintenance and transaction processing. Wealth management consultants, 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. This results in improved acquisition and retention of high-net-worth clients, as well as better operational efficiency with reduced costs.



The Solution You Need

In a time when every financial institution is looking for ways to become more profitable and stake out a competitive advantage, Efficiency Manager does a lot of the heavy lifting for you. The solution connects your knowledge workers with modern tools that streamline daily processes, increase operational efficiency, reduce costs, and improve the overall experience for your organization's associates and your customers.



Connect With Us

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Fiserv is driving innovation in Payments, Processing Services, Risk & Compliance, Customer & Channel Management and Insights & Optimization. Our solutions help clients deliver financial services at the speed of life to enhance the way people live and work today.

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