Top 6 Advantages of Digital Document Management at Community Banks

SmartVault

Elevate service, streamline operations, and build lasting customer relationships with SmartVault, an intuitive, secure document management system and client portal.

1. Builds Your Community

SmartVault lets financial institutions provide modern service that's personalized – and it's this great service that keeps customers happy and encourages them to recommend you to others. As you continue to scale and build relationships with the people in your area, they'll see your commitment to providing financial services that help their neighborhoods grow and prosper.

2. Simplifies Customer Collaboration

Solve everyday headaches you experience when working with customers, such as playing phone tag to remind them to complete a form or resending information to a customer who lost your first email in their inbox. With SmartVault, customers can securely log in to access, share, review, complete, and eSign documents 24/7 in our secure client portal. This is more convenient than calling or visiting a branch, increasing customer satisfaction and referrals. The portal also enables staff to share forms and documents and access historical information instantly.

> "When time is of the essence, we value being able to process documentation and get it to the customer quicker and securely. We also receive a faster response from the customer than when everything went through email."
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> BayFirst Financial, Process Analyst, Alex Fernandes
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> **Read the full story >**

3. Makes Employees Happier (and More Efficient)

Digitizing processes eliminates the need for physical files, helps staff save time on admin tasks, and makes it easy for employees across branches to collaborate. Having a central repository for files makes it faster to retrieve information and provide excellent service. The ability to work remotely also gives staff flexibility.

4. Creates User-Friendly Processes

Traditional software requires everyone to spend time learning how to use it, which creates a major barrier to making even necessary changes. SmartVault is user-friendly and intuitive, regardless of how tech-savvy a person is. Not only can you come up to speed on the features quickly, but you can rest assured your customers and employees will too.

5. Secures Your Data

SmartVault has bank-level security and invests heavily in ensuring our customers' data stays safe. You'll benefit from advanced security measures like automatic data backup, file versioning, activity tracking, encryption, and multi-factor authentication (MFA). And granular access controls let you be in 100% control of who accesses what folders and documents. These security standards create peace of mind for your team and customers and can help you meet the most stringent industry regulations.

6. Keeps You Up and Running

Whether you experience a building fire, a computer malfunction, or someone accidentally deleting a file, SmartVault makes it significantly easier for you to recover and get back up and running. Storing your information on remote rather than on-premise servers means that you won't lose everything even if a flood or other weather event impacts your home or office.

SmartVault helps over 3 million people securely gather, store, share, and eSign documents in the cloud.

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