DOXIS

> Our implementation of Doxis resulted in a 40% increase in user satisfaction, an efficiency gain of over 950 hours per year and thousands of dollars saved annually. With Doxis, we're scaling our business in terms of volume, performance and future enhancements.
>
> **Kevin McCollam, Sr. Product Manager, Loan Servicing, Northmarq**

Best Practice

Northmarq

Company	Northmarq
Topic	Enhancing loan servicing efficiency with Doxis
Industry	Financial services
Employees	1.000
Headquarters	Minneapolis, Minnesota
Integration	Salesforce, Enterprise Loan Management Platform, Azure Active Directory
Project scope	North America

Challenges
- Slow, unintuitive DMS system causing operational paralysis
- Overwhelmed with managing millions of documents
- Needed greater scalability and flexibility

Targets
- Increase user satisfaction
- Achieve significant cost savings
- Improve performance as document volumes soar
- Enhance user experience with an intuitive UI
- Seamlessly integrate with CRM and loan systems

Solutions
- Successfully migrated 6M documents to modern ECM system, Doxis
- Hundreds of hours saved per year & thousands of dollars annually
- Streamlined operations by reducing workflows from 42 to 19
- 40% increase in user satisfaction

Project scope

Starting point

With over 1,000 employees and an annual transaction volume surpassing $39 billion, Northmarq is a fast-growing leader in financial services specializing in commercial loan servicing. Prior to implementing Doxis, the company faced challenges with their previous document management and workflow system. It was underperforming, causing delays and inefficiencies in document processing, and lacked the scalability needed to keep up with the company's growth. They required a platform that could handle increasing document volumes and provide a robust framework for future enhancements.

Solutions & integration

- Doxis Intelligent Content Automation
- Doxis webCube & Doxis smartCube
- Doxis workflow automation
- Doxis SmartBridge for Salesforce, APIs, and SSO with Azure Active Directory
- Integration with loan servicing platform, proprietary portals and other internal systems

Volume of documents

- ~6M current volume
- 10,000-100,000+ documents added per month

Users

- 750 current users
- Potential for 1,000+ future users

Reasons for Doxis

- Extensive customization and integration capabilities
- Comprehensive performance features
- Positive feedback from multiple lines of business leaders
- Strong references and reputation
- Detailed vendor evaluation process by an independent specialist

"The big USP of Doxis is that it unites business process management and content management on one powerful platform – something the other vendors just couldn't offer us."

**Kevin McCollam, Sr. Product Manager,
Loan Servicing, Northmarq**

Benefits

- 42 workflows streamlined to 19, unlocking more time to spend on high-value tasks and business scaling
- Projected to save thousands of hours over the next years
- 40% increase in user satisfaction
- Substantial cost reductions due to fewer manual workflows

- More intuitive interface with rapid document access, empowering employees to work better, faster and enjoy an easier day-to-day
- Confidence to adopt additional AI-powered solutions available on the Doxis platform in the next phase of the partnership

Visit our website to learn more:

www.doxis.com