

**BROCHURE**

# Introducing the **Dynamic Document Builder** for FS&I

**Revolutionizing Document Creation**

# EPAM's Dynamic Document Builder for FS&I: Empowering Compliance & Efficiency

In the fast-paced worlds of financial services, retail banking and insurance, creating compliant and consistent documents can be a challenge.

That's why we've developed the Dynamic Document Builder, a revolutionary tool designed to empower digital and marketing teams to streamline their document creation process. With our innovative solution, you can accelerate the production of policy documents, financial statements or regional offers by locking in critical components, like Terms and Conditions, ensuring they remain unchanged and compliant.

Featuring an intuitive drag-and-drop interface, Dynamic Document Builder enables users to effortlessly assemble

documents, maintaining consistency and support adherence to regulatory standards. Say goodbye to the risks of non-compliance and hello to efficient, error-free document creation that meets all financial services and insurance (FS&I) requirements.

By streamlining the creation, management and distribution of your financial documents, DDB can help you meet strict industry standards while enhancing productivity and client trust.

## Key FS&I Challenges Addressed



### REGULATORY COMPLIANCE

Rapid changes in financial regulations in part require documents to be accurate, auditable and version controlled.



### RISK MANAGEMENT

Ensuring data integrity and minimizing exposure to errors helps avoid significant financial or legal risks.



### OPERATIONAL EFFICIENCY

Handling high volumes of documents demands an agile, scalable solution, whether it's for client onboarding, general terms and conditions or an update to a core piece of content.



### SECURITY

Safeguarding sensitive financial information helps ensure only authorized access to critical data.



### CAMPAIGN LOCALIZATION

Roll out offers and campaigns specific to regions, local branches or events in record time.

# Solution Features & Benefits

## 01

### Modular Document Creation

#### HOW IT WORKS

Assemble documents by piecing together individually crafted dynamic sections of content blocks that pull on real-time data components (such as client disclosures, policy summaries, risk assessments and interest rates) via a simple drag-and-drop interface.

#### FS&I BENEFITS

- **Consistency & Speed:** Quickly build client-specific documents that help maintain compliance with branding standards.
- **Collaboration Across Departments:** Enable legal, compliance and sales teams to contribute seamlessly.
- **Campaign Benefits:** Campaigns can be created at one location and rolled out to specific branches, markets or products with a click of a button.

## 02

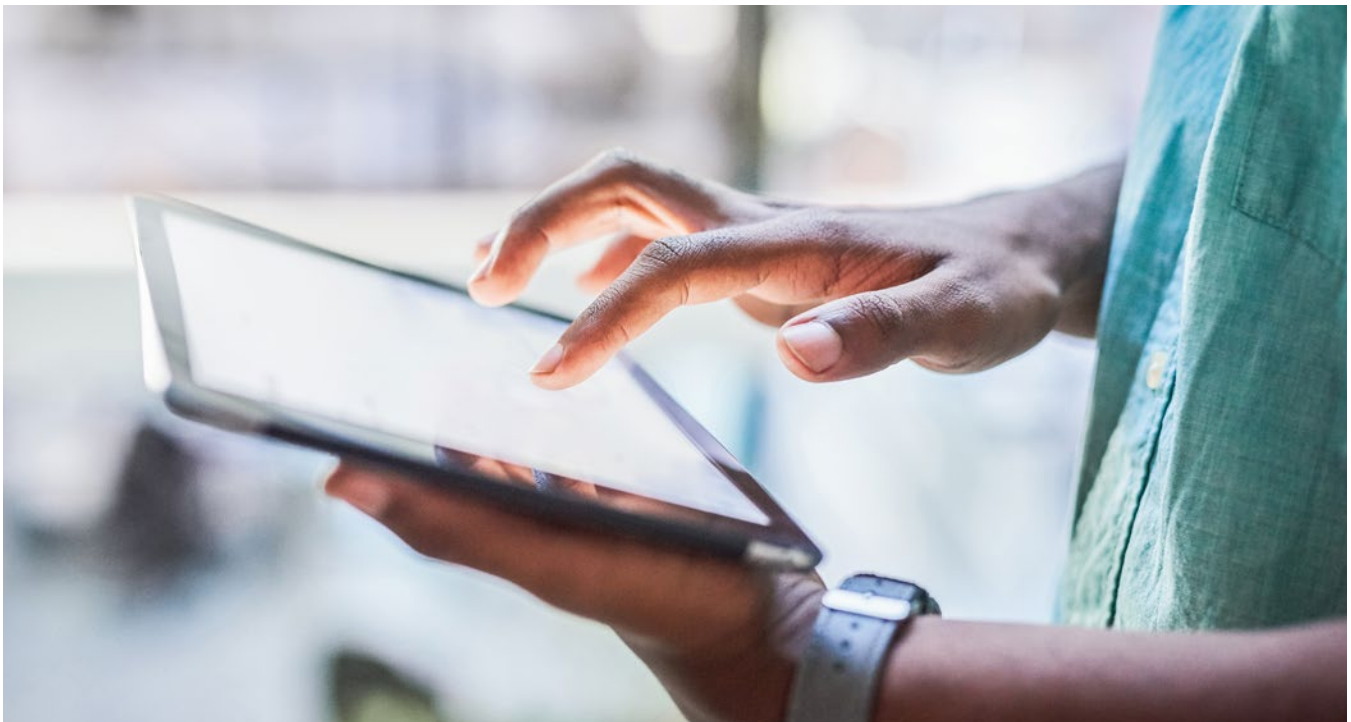
### Content Reuse & Versioning

#### HOW IT WORKS

Utilize pre-approved content blocks and maintain a full revision history for each document.

#### FS&I BENEFITS

- **Audit-Ready Documentation:** Always have an up-to-date, verifiable history to support regulatory audits.
- **Error Reduction:** Minimize the risk of distributing outdated or non-compliant information.



## 03

**Custom Content Entity****HOW IT WORKS**

Define custom content entities to manage each document's lifecycle — from creation to review and publication.

**FS&I BENEFITS**

- **Tailored Metadata:** Tag documents with industry-specific identifiers like product types or client segments.
- **Enhanced Discoverability:** Quickly locate critical documents during internal reviews or regulatory inquiries.

## 05

**Workflow & History Tracking****HOW IT WORKS**

Integrate with a robust workflow engine that mandates thorough review and approval at every step.

**FS&I BENEFITS**

- **Transparency:** A complete audit trail ensures full accountability for every change.
- **Enhanced Compliance:** Simplify ability to demonstrate adherence to internal processes and external regulatory requirements.
- **Rapid Updates:** Need to update a global campaign based on a new legislature or an update to financial markets? No problem. Digital channels can be updated with new information at the touch of a button and pushed out globally or regionally to areas of impact.

## 04

**Drag-and-Drop Builder****HOW IT WORKS**

Empower users with an intuitive interface to visually assemble documents without the need for coding.

**FS&I BENEFITS**

- **User Empowerment:** Enable non-technical staff to produce accurate, personalized documents.
- **Rapid Turnaround:** Streamline document creation during peak times such as regulatory reporting periods or policy renewals.
- **Fast Creation:** Enhance overall team productivity by enabling users to create faster with less training.

## 06

**AI-Driven Localization****HOW IT WORKS**

Automatically translate and adapt documents for different regions using advanced AI tools.

**FS&I BENEFITS**

- **Global Compliance:** Configure to support meeting local regulatory requirements and customer expectations in international markets.
- **Cost Efficiency:** Reduce the dependency on external translation services while maintaining high accuracy.
- **Time Savings:** By utilizing AI for manual tasks like translation, users' time can be spent on other projects.

## 07

### Tracked Publication & PDF Export

#### HOW IT WORKS

One-click publication produces secured PDFs that can be tracked for usage and compliance metrics.

#### FS&I BENEFITS

- **Reliable Distribution:** Ensure that final documents, such as policy statements or investment reports, are delivered accurately and securely.
- **Insightful Analytics:** Use publication data to refine document strategies, enhance client engagement, and improve data-driven decision making.

## 08

### Compliance & Digital Rights Management

#### HOW IT WORKS

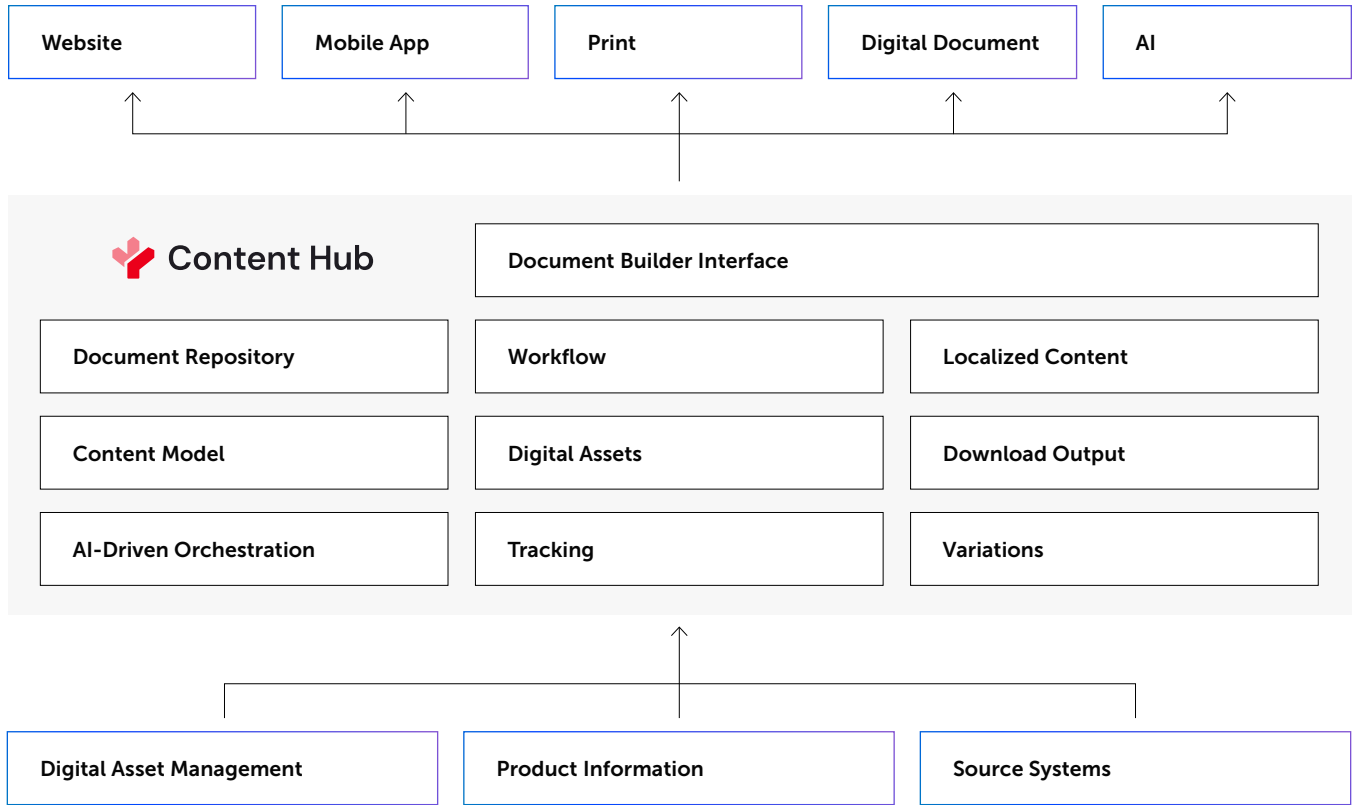
Embed comprehensive DRM and compliance controls to restrict access and prevent unauthorized modifications.

#### FS&I BENEFITS

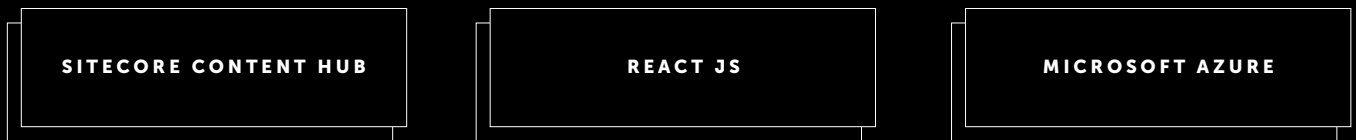
- **Data Protection:** Secure sensitive financial data against breaches and unauthorized access.
- **Regulatory Assurance:** Demonstrate adherence to strict industry standards and reduce risk exposure.



# Solution Architecture

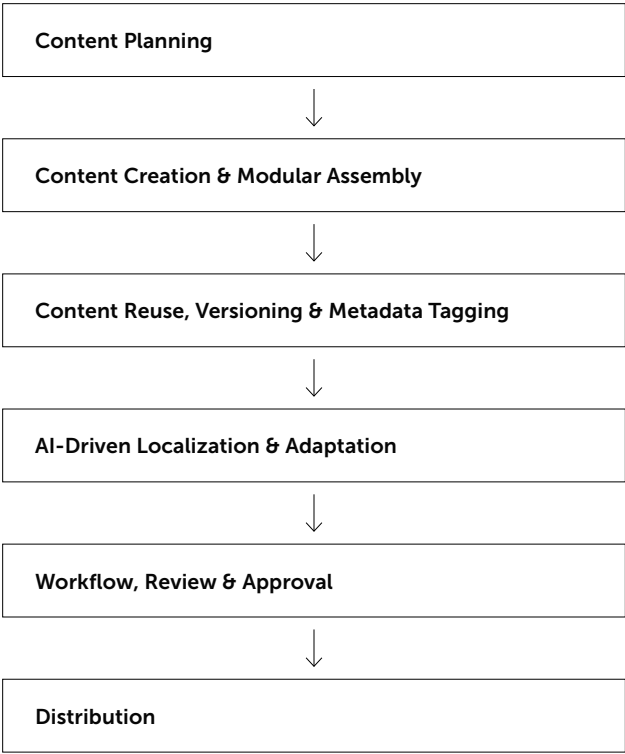


# Tech Stack

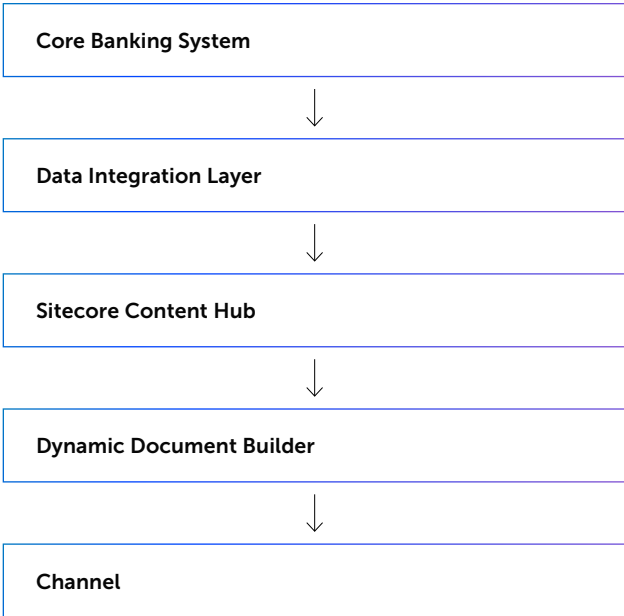


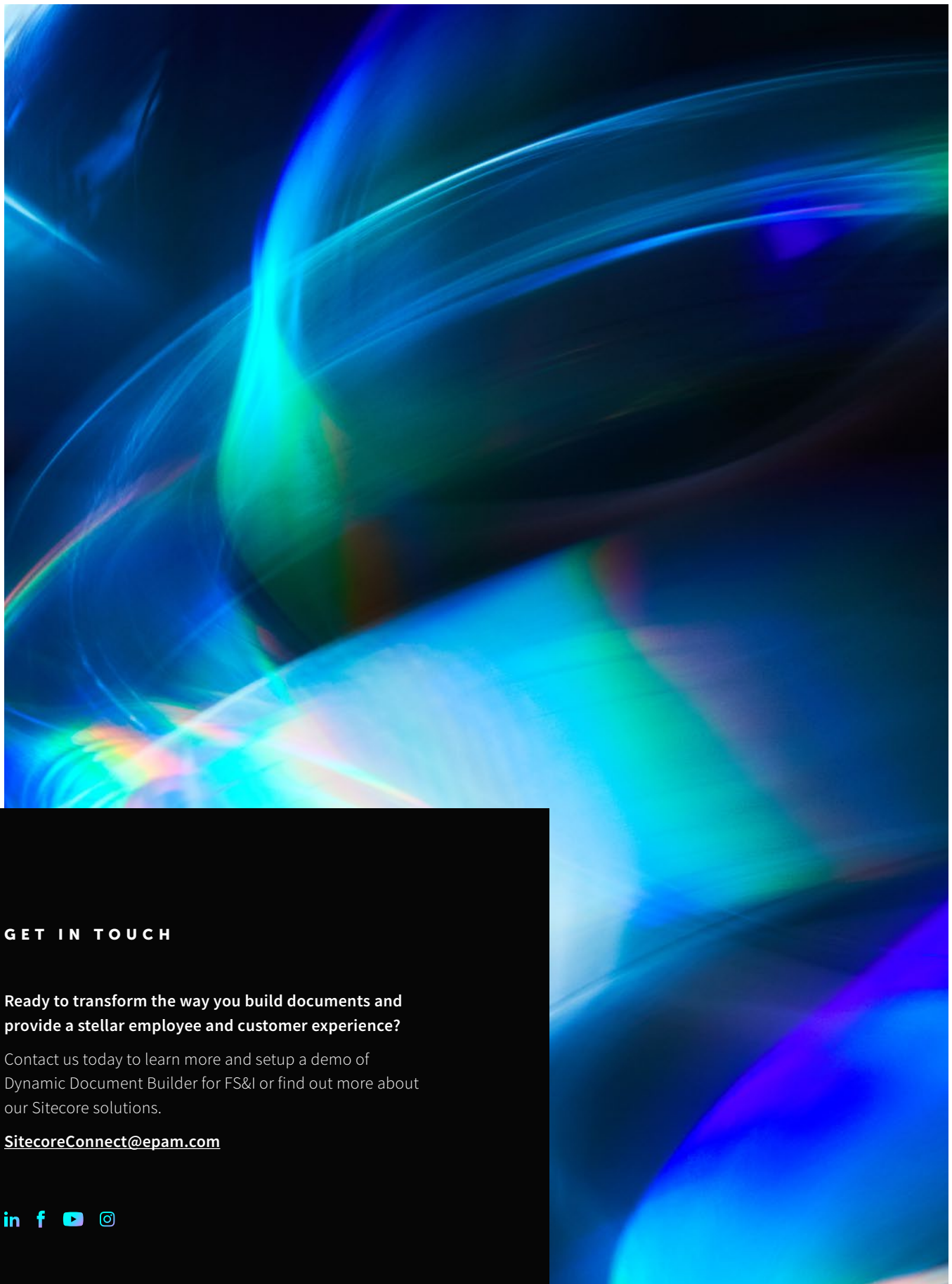
# Lifecycle & Ecosystem

## CURRENT CONTENT LIFECYCLE



## WHAT THE ECOSYSTEM COULD LOOK LIKE





## GET IN TOUCH

**Ready to transform the way you build documents and provide a stellar employee and customer experience?**

Contact us today to learn more and setup a demo of Dynamic Document Builder for FS&I or find out more about our Sitecore solutions.

[SitecoreConnect@epam.com](mailto:SitecoreConnect@epam.com)

