

Five key insights from the financial professional survey

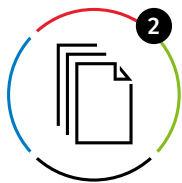
In a recent survey conducted among financial professionals in the digital lending and compliance sector, valuable insights were obtained regarding their preferences, concerns, and investment priorities. The data collected offers a view into the current industry landscape, highlighting areas for improvement and innovation. Read on to discover the top five insights derived from this survey.



1 Signature gathering

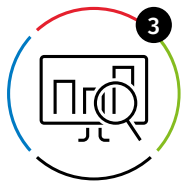
Digital signature solutions, particularly DocuSign, have gained widespread adoption among financial professionals. Interestingly, in-person signatures still remain popular, especially among financial professionals at community banks and credit unions. This suggests that traditional methods of document signing still appeal to a segment of professionals.

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2 UCC filing methods

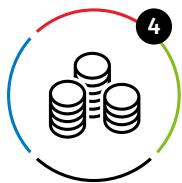
The survey revealed a diverse range of approaches to UCC management among financial professionals. While some rely on technology solutions, others still prefer manual processes. Notably, small banks demonstrated a higher preference for manual methods, potentially influenced by resource limitations, lack of awareness, and cost considerations.



3 Top concerns

The top concerns identified by financial professionals in the industry revolve around regulatory change management, document preparation, and enhancing the digital customer experience. While AI applications are not currently a top priority, these professionals recognize their potential benefits and are planning significant investments in this area in the future.

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4 Tech investments

Financial professionals are prioritizing investments in AI and automation, digital account opening, and loan origination. The aim is to streamline processes and improve overall efficiency. Interestingly, community banks and credit unions are less inclined to invest in AI and automation compared to their midsize and large counterparts.

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5 Technology selection criteria

When selecting a technology partner, financial professionals prioritize overall product suite functionality, ease of implementation and maintenance, and cost-effectiveness with a potential return on investment. Large banks place a particular emphasis on seamless implementation, ongoing maintenance, and the reliability and support provided by the technology partner.

Ready to explore the full insights?

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The data gathered in this survey emphasizes the need for continuous improvement and innovation within the financial services sector, taking into account resource limitations, awareness, and cost considerations. By addressing the identified concerns and making strategic investments in suitable technologies, financial professionals can enhance their operations and better serve their customers in the dynamic world of digital lending and compliance to grow their businesses.

Read the digital book containing all the survey findings that highlight the importance of continuous improvement and innovation in the financial services sector. Discover how addressing concerns and investing in suitable technologies can enhance operations and customer service to drive business growth in the digital lending and compliance landscape.

[Transforming Financial Services: Insights from Industry Professionals eBook →](#)



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