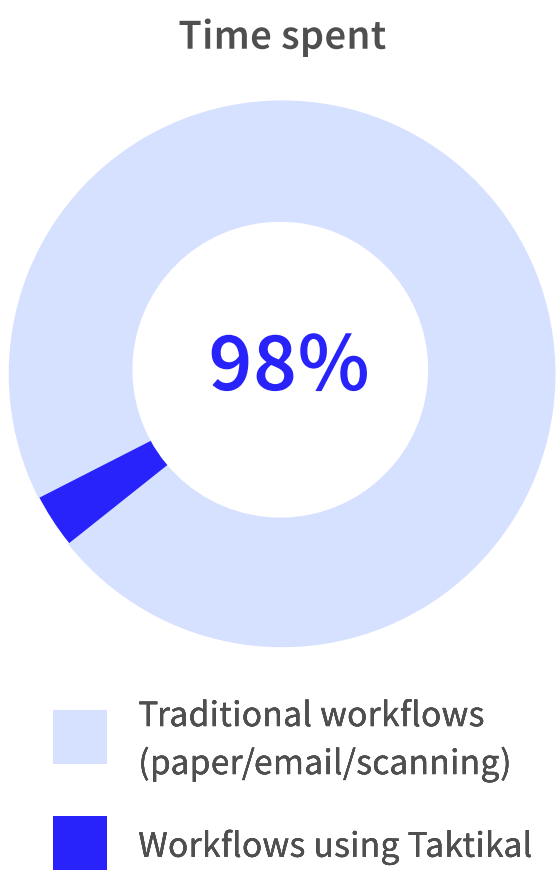




Digital signatures, legal workflows, AML and digital compliance

98% faster onboarding and compliance



The amount of manual paperwork required by legal services providers is a central challenge faced in the effort to modernize workflows and improve operational efficiency. Administrative tasks and analog processes often keep professionals from time spent communicating with clients. Important documentation can be easily overlooked, updated without receiving proper approval, or missing components to comply with necessary regulations.

Taktikal provides a secure online portal to help transition to a paperless process, where documents can be easily managed, customer onboarding streamlined, and data collected easily. The option to offer authenticated electronic signatures makes it faster to get documents signed. Taktikal’s solutions aim to reduce the amount of time spent on mundane tasks, giving time back to focusing on providing a better client experience.

2 days to 3 minutes

Average time to complete forms processing
- Vörður Insurance

2 FTEs

Labor saved since implementation
- TM Insurance

7,854 signatures

Average number collected online monthly
- TM Insurance

2 months to 5 days

Time it took to set up a seamless integration
- Sjóvá Insurance

241,826 trips

Current number of car trips prevented
- Taktikal total

72

Number of policy forms already digitalized
- TM Insurance

Key Benefits for Legal Services

Reduce paperwork

Tailored digital questionnaires reduce the amount of paperwork and lengthy and complex communication typically required for the privacy measures for clients.

Standardize processes

Maintain an overview of processes and collaborate with the necessary parties to confirm document approval. Follow up with just a few clicks to speed up the workflow.

*Based on customer data where collecting customer details and signatures went from three days down to three minutes using Taktikal’s solutions.

Streamline workflows

Create fully online workflows so that staff can manage and process all client data seamlessly through digital solutions that help drastically reduce document processing times.

Manage documents

Workflows and client data can be gathered and managed all in one secure company portal, allowing for a clear overview of the activities and history of all documents.

Stay compliant

Set up a digital process once that adheres to all regulations that can then be easily shared with clients or other parties, helping ensure documents stay court-admissible.

**The Taktikal
Approach to Legal
Services**

Privacy and regulation compliance on the part of both the client and the firm is crucial in the legal services industry. Firms looking to provide a secure online environment for customers while also improving workflow efficiency and eliminating unnecessary paperwork are turning to digital solutions. By transforming the way documents are handled by moving them to a fully online platform, companies are more easily able to optimize company time.

Taktikal offers customizable digital solutions that enable companies to offer a tailored client experience and minimize the amount of paperwork typically required, including secure document signatures and approval by the necessary stakeholders.

Use cases for Taktikal solutions

- Multiple signatories
- Power of attorney
- Customer onboarding

Custom online forms

Build a tailored digital questionnaire to guide clients through providing all the necessary information for onboarding in a simple, comfortable, and secure online portal.

White label options

Implement online forms and electronic signature solutions complete with custom company branding and logo to provide a seamless, trustworthy experience for clients.

Electronic signatures

Verify customer identity with electronic signatures for every online form and onboarding process to follow client privacy measures. Electronic seals prevent unapproved changes.

Fast API integration

Straightforward Rest APIs give developers the resources to establish a connection between the solution and the company system. Assistance with custom connections is available.

Identity authentication

ID verification is required for each customer accessing a form or digitally signing a document and is submitted securely within the designated company portal.