

Flawless client outreach and document exchange

Corporate clients expect a seamless digital experience. Relying on email and manual processes to gather KYC information leads to delays, frustration, and a poor client experience. This results in duplicated data, disparate information, and a lack of transparency.

EC Private Outreach is a revolutionary solution that sets the standard for KYC outreach and corporate document exchange. Powered by the EC360 Corporate Digital Identity (CDI) platform, it solves the complex challenge of corporate client identification and verification and provides a unified, secure repository in EC CoopID for corporate clients to easily structure and share documents across multiple entities with banks. The result is a faster, slicker client experience that fuels KYC excellence without compromising on robust compliance.



Key benefits

Single secure platform

Streamline client information exchange and communications with structured outreach requests and full visibility for banks and clients.

GDPR-compliant document storage

Clients securely store and share documents in a digital vault in EC CoopID.

Cloud-based solution

Fully managed and hosted solution with minimal impact on internal IT resources.

Accelerated KYC reviews

Reduce repeat requests and increase operational efficiency.

Enhanced client experience

Minimize internal friction and errors with improved internal collaboration, delivering a smoother client journey.



Key features

Efficient client information management

- **Dashboard.** Overview of all tasks and requests requiring attention.
- **Client overview page.** View all clients and their entities, download reports, invite new clients to the platform and set up email notifications for relevant clients' activity.
- **Outreach requests.** Standardize document requests, send messages and schedule reminders for clients to complete requests, receive notifications when actioned, review information, and set and track statuses.
- **Multi-entity requests.** Send consistent outreach requests via UI, bulk upload, or API to collate KYC information for multiple entities.
- **Digital profile.** Private original source documents are collated into a digital profile, complete with full data provenance and audit trail.

Secure document management

- **Easy digital onboarding.** Simple registration and platform access for new EC CoopID clients via a click through onboarding process.
- **Digital vault.** Secure repository for clients to store and structure sensitive documents.
- **Custom permissions and access management.** Set up teams and customize access for users to enable internal collaboration across front and back-office. Prevent information sharing between business units and create different user roles and permissions to meet identity and access management (IAM) needs.
- **Comprehensive audit trail.** Automatic logging of all actions and responses for full transparency.

Security and hosting

- Secure HTTPS internet connection
- Data encrypted at rest
- Two-factor authentication (2FA)
- GDPR compliant
- Fully hosted and managed cloud-based solution

About Encompass Corporation

Encompass enables fast, accurate identity validation and verification of corporate clients, and a gold standard approach to KYC. Our award-winning corporate digital identity (CDI) platform and innovative solutions incorporate real-time data and documents from authoritative global public data sources and private client information, to create and maintain digital risk profiles. With Encompass the world's leading banks improve client experience and increase business opportunities through consistent regulatory compliance and risk mitigation.