

Automate financial documentation, while improving compliance and client service.



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Empower advisors and other financial professionals to create high-quality documentation faster and more efficiently while improving compliance and client service with Nuance's® powerful documentation solutions – Winscribe Dictation® workflow and Dragon® Professional Group speech recognition.

Financial services organizations of all sizes are focused on risk and compliance management, along with providing quality client service. To help address these issues, many firms are seeking new tools to help manage their heavy documentation demands and costs, while ensuring compliance is met and client interactions are recorded quickly, thoroughly and accurately. Nuance Winscribe Dictation workflow management and Dragon Professional Group speech recognition solutions help advisors capture and share the detailed information needed to complete financial documentation, minimize compliance risk and improve client services – all by voice.

Complete more accurate financial documentation and automate workflows.

Improve financial documentation by voice.

Nuance Winscribe Dictation workflow and Dragon Professional Group speech recognition solutions enable financial, wealth management and investment advisors to dictate, transcribe and manage letters, client notes, reports and other documentation workflows more efficiently. With Winscribe Dictation's powerful documentation workflow solutions, professionals can share their work, check the status of each job, and identify and remedy bottlenecks in documentation workflows to help improve efficiency. With the addition of Dragon Professional Group speech recognition, professionals can balance their paperwork demands and regulatory compliance efforts and dictate detailed financial documents 3x faster than manually typing by hand, all by voice.

Improve document creation and turnaround.

Dragon Professional Group makes it easy for financial services professionals to create more detailed, accurate client plans, reports, disclosures, and other documentation 3x faster than typing by hand, with up to 99% recognition

Benefits at-a-glance

- Capture information in real-time and improve reporting detail and accuracy
- Reduce risk and achieve compliance
- Make applications and case management systems easier to use and navigate, by voice
- Streamline report creation and documentation workflows for more timely communications
- Securely and centrally manage client data, recordings and transcribed reports
- Improve revenue and employee productivity, enabling advisors to focus on client service
- Produce transcribed documents faster and more cost-effectively
- Provide real-time monitoring and reporting for improved outcomes

Built for teams. Built for the enterprise.

Nuance offers flexible volume licensing programs that are designed to help organizations realize improved productivity at an affordable price.

accuracy. Firms can then use Winscribe Dictation's centralized digital dictation workflow system to automate manual processes within the dictation and transcription documentation workflow. Winscribe Dictation collects and delivers dictations, assesses information about each job and automatically routes work to the appropriate location, making it instantly available to support staff. Winscribe's workflow engine recognizes deviations in the normal workflow (such as support staff availability and document completion timelines exceeded) and automatically takes corrective action by rerouting work and notifying management.

Enhance productivity for your mobile workforce.

Easily integrate Nuance's cloud-based, professional grade mobile dictation solution, Dragon Anywhere Group, into your mobile workflow and enable professionals to complete documentation requirements in real-time via their iOS® and Android™ smartphones and tablets. Advisors working in or outside of the office can dictate letters, client notes, reports, tasks, directions to support staff and more, and send those recordings instantly for transcription or follow-up.

Fast and accurate documentation is just a phone call away.

Nuance Winscribe Telephony Dictation is a powerful dictation system that can be accessed from any touchtone telephone in the world. This system is perfect for financial professionals dictating on the move or away from the office, using either a mobile or fixed-line telephone. In addition, Winscribe Voice Forms allows mobile employees to respond to telephone voice prompts that gather information for form-based documents. This ensures more complete and accurate data is gathered during the dictation process.

Manage and measure to boost success.

Quickly and easily manage data and create reports based on your organization's requirements. Managers can monitor the status of the entire dictation and transcription process in real-time. In addition, reports can be produced to assess employee productivity, and efficiency metrics can be used to identify potential bottlenecks, so business managers can continually make improvements to their processes.

Optimize third-party information systems and data management.

Nuance Winscribe Dictation can interface with case management systems and other third-party information management systems to improve data integrity and further optimize documentation efficiency – eliminating data duplication and errors and saving time. With a built-in software development kit (SDK), Nuance Winscribe Dictation application is built to be flexible and scalable for every agency's requirements and business goals.

Centralized management and distribution

Dragon Professional Group and Nuance Winscribe Dictation workflow system allow financial and wealth management organizations to efficiently create, share and distribute documentation, and track and manage each job from one centralized location.

Supports thin client environments

Nuance Winscribe Dictation is compatible with thin client technology, such as Citrix or Windows Terminal Services.

Accessibility and reporting compliance

Nuance Winscribe Dictation maintains a consolidated information store. This allows managers to monitor the status of the entire dictation and transcription process in real-time. Managers know how many jobs are in the system, who has ownership and the status of jobs. Attorneys can also track the status of their individual work. Historical reports assess productivity and efficiency metrics used to identify potential bottlenecks and continually make improvements to the documentation process.

System requirements

Nuance Winscribe Dictation

- Windows 7 or higher
- Windows Server 2008 R2 or higher
- RAM: Minimum 4GB

Dragon Professional Group

- Windows 7, 8.1, 10 (32- and 64-bit), Windows Server 2008 R2, Server 2012 R2, and Server 2016 (64-bit)
 - RAM: Minimum 4GB
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About Nuance Communications, Inc.

Nuance Communications is reinventing the relationship between people and technology. Through its voice and language offerings, the company is creating a more human conversation with the many systems, devices, electronics, apps and services around us. Every day, millions of people and thousands of businesses experience Nuance through intelligent systems that can listen, understand, learn and adapt to your life and your work. For more information, please visit nuance.com.
