



## DATASHEET: VIRTUAL ROOM



# OneSpan Virtual Room

Reimagine customer engagement. Get documents signed in a secure, live videoconferencing session.

### Highlights

#### Live E-Signature

- Capture legally binding, admissible, and enforceable e-signatures in real-time

#### Videoconferencing

- Transact with signers in different locations using built-in videoconferencing

#### Authentication

- Verify identities of participants in the virtual signing session

#### Co-browse

- Simultaneously review documents with signers and address their questions in real-time

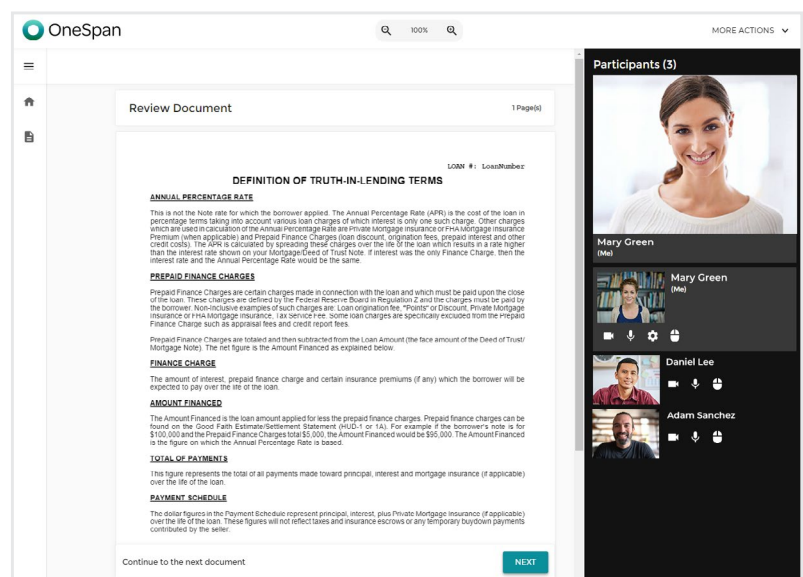
#### Recording & Audit Trails

- Capture vendor-independent audit trails with the option to record the virtual signing session

## Recreate the Power of the Face-to-Face Meeting – Virtually

Agreement processes are most successful when completed in-person. Why? Because consumers tend to turn to channels where they can get human help – especially for complex, multi-step agreements. That's why in today's increasingly remote world, the human element is more important than ever before. Organizations that can offer a personal, human touch remotely are in a better position to get their customers the help they need and ultimately win them over.

The Virtual Room enables financial institutions to re-create the power of the face-to-face meeting and complete financial agreements that require human assistance. It brings together electronic signature, web-enabled videoconferencing, and rich collaboration capabilities in one solution.



## Use Cases

The Virtual Room goes beyond the ability to web conference and capture an electronic signature. It helps you conduct business in a virtual environment, as if you were meeting your customers in-person.

### Account Opening

Retail banking, commercial banking, wealth, insurance policies, investment accounts, and more.

### Account Maintenance

Beneficiary changes, investment account review, switching accounts, etc.

### Product Applications

Mortgage, loans, annuities, and more.

### Insurance Claims

Submission and review of claims by agents and brokers.

### Automobile Financing

Vehicle financing and leasing agreements.

## Bring the Human Element to Your Remote Agreement Processes

The Virtual Room helps you deliver a secure and interactive experience to guide a customer through the financial agreement process and effectively close the deal.

It's a win-win for you and your customers. Your customers get the financial help they need from the convenience of their home or office, and your organization gets access to a new, high-touch channel to engage with customers *as humanly as possible*.

## How It Works

An easy 5-step process to get documents signed virtually and reduce missing and incorrect information in account applications and forms.



- Upload documents or select predefined template
- Add signers
- Set the date and time for the virtual signing session

- Signers join the Virtual Room by clicking the link in the email invitation

- Signers verify their identity using the selected authentication method (optional)

- The host and signers enter the video-enabled Virtual Room
- The host helps signers understand the agreement in real-time

- Guided workflows provide signers with easy-to-follow cues
- Signers initial and sign the document
- Signers download a copy of the e-signed documents

## Why Virtual Room?



### Fast & Convenient

Built-in videoconferencing eliminates the need for in-person meetings to review and sign documents.



### Secure Agreements

Bank-grade security, digital signature encryption, and strong identity proofing capabilities ensure data and documents are always secure.



### Real-time Assistance

A “white-glove” experience to address customer questions in real-time and ensure they get the help they need.



### Strong Electronic Evidence

Vendor-independent audit trails with the option to record the virtual signing session.



### Fully Branded Experience

Fully white-label the e-sign process to keep the spotlight on your brand– from start to finish.



### All-in-One Solution

Built-in e-signature, videoconferencing and rich collaboration features with no need to patch multiple solutions together.

## About OneSpan

OneSpan, the digital agreements security company™, helps organizations accelerate digital transformations by enabling secure, compliant, and refreshingly easy customer agreements and transaction experiences. Organizations requiring high assurance security, including the integrity of end-users and the fidelity of transaction records behind every agreement, choose OneSpan to simplify and secure business processes with their partners and customers. Trusted by global blue-chip enterprises, including more than 60% of the world’s largest 100 banks, OneSpan processes millions of digital agreements and billions of transactions in 100+ countries annually.

Learn more at [OneSpan.com](https://www.onespan.com)

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