



# Live Transcription Services Differentiate Fintech Company from the Competition

Customer Story



Copytalk® utilizes Flexential colocation services to improve overall security and resiliency posture, addressing the demanding requirements of enterprise financial services clients.

“People choose Copytalk because of our focus on security. That’s reflected in our decision to move to Flexential. The physical security controls, the environmental redundancy and the staffing model just excelled across the board.”

**Baird Juckett**  
VICE PRESIDENT OF TECHNOLOGY  
Copytalk

## The History

Copytalk is a premier transcription service devoted to the financial service industry’s meticulous standards for efficiency, accuracy and privacy in documenting client meetings. Since 2001, the company has provided its clients with secure, mobile transcription services to document interactions via phone calls, smartphone apps or web interfaces. The company’s proprietary platform, Copytalker™, allows financial advisors to access one-touch dictation, audio-file submission, transcription and transcript delivery—effectively bringing a live, financially fluent transcriptionist to every advisor’s device.

“We help financial advisors capture critical information at the point where they have it,” said Baird Juckett, Copytalk’s vice president of technology. “It’s really about retaining and preserving information that might otherwise be lost. Instead of going back to the office or typing it up themselves, they can just call into Copytalk right after they meet with their clients.”

## Flexential Partnership Highlights

- Physical access controls boost confidence in data security
- Built-in redundancies support overall security and resiliency
- Compliance certifications support requirements of the financial services market

## Quick Facts About Copytalk

- Provides secure transcription services to the financial sector
- Operating for more than 18 years
- Utilizes multiple modes to document interactions
- Awarded the Bank Insurance and Securities Association’s (BISA) Technology Innovation Award for the fourth consecutive year



Colocation



Security

## The Challenge

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### Highly Secure Colocation Needed to Match Rigorous Internal Controls

Copytalk customers, which are in the highly regulated financial services industry, benefit from an innovative, security-focused approach to transcription, supplied quickly and reliably. Not only does this documentation help financial services professionals track information and decisions, but it is also required in order to comply with established industry regulations.

Copytalk supports these business-critical needs with policies and services structured with the highest security in mind. This includes utilizing controlled and monitored U.S.-based facilities for its transcriptionists. To address the strict customer confidentiality requirements, scribes cannot access customer information and only possess the dictation while they are transcribing it. The company also sends transcript copies via secure, encrypted email or directly into its customer relationship management solution within a few hours, and transcriptions are purged after 60 days in order to preserve the privacy of the client.

The company also recently launched facial and fingerprint recognition requirements for users to log in through its app, providing another security enhancement to its customers.

To bolster this security and protection, Copytalk requires a secure IT environment to support its transcription services. When its previous data center vendor struggled to provide adequate security protocols, it sought a new provider to deliver the level of privacy, accuracy and reliability its clients demand. Given its stringent internal security protocols, Copytalk wanted to ensure its data was housed in a facility that was equally ironclad. Additionally, the company required a local vendor in proximity to its main corporate office because maintenance is performed in-house.

## The Solution

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### Environmental Security Features and Redundancies Strengthen Copytalk's Service Delivery

Copytalk found the meticulous attention to privacy, security and data protection with Flexential.

"People choose Copytalk because of our focus on security," said Juckett. "That's reflected in our decision to move to Flexential. The physical security controls, the environmental redundancy and the staffing model just excelled across the board." Copytalk selected the Flexential Tampa – North data center as its primary production facility responsible for holding all the main application logic and permanent data storage in addition to its website and web services.

Serving the Florida high-tech corridor, Flexential's highly secure Tampa – North data center features redundant power and energy-efficient cooling and was built to withstand a Category 5 hurricane. The facility features 2N UPS redundancy and

N+1 cooling to optimize uptime and environmental conditions. Flexential also offers redundant, automatically rerouted connections ranging from 10 megabits per second to 10 gigabits per second to ensure ongoing connectivity.

“In terms of environmental controls, the greater redundancy and the thoughtfulness of design in terms of maintaining an ideal server environment are exceptional.”

**Baird Juckett**  
VICE PRESIDENT OF TECHNOLOGY  
Copytalk

The data center’s physical security includes 4-zone security access, biometric scanners, and monitored security cameras and intercom systems. The center is also compliant with several regulatory elements to help businesses meet their own regulatory requirements.

Now that Copytalk is fully operational and deployed, Juckett echoes the decision to utilize Flexential as the brains of the Copytalk service. He noted the access control mechanisms are far superior to other offerings as on-site staff monitors activity 24/7 and visitors must pass multiple access levels to enter the facility.

“In terms of environmental controls, the greater redundancy and the thoughtfulness of design in terms of maintaining an ideal server environment are exceptional,” said Juckett.

He also affirmed that the Flexential staff exhibits a high level of technical competency, a professional demeanor and an inclination to engage and work through things until there is a resolution.

## The Results

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### Partnership and Security Create a Winning Package for Copytalk

Since engaging with Flexential, Copytalk’s turnaround time for audit requests and questions about the facility in support of audits have greatly improved.

“The organizations that we work with have an obligation to review our vendors based on their criticality and access to information, and we do our best to support those efforts by providing details about the operation,” said Juckett. “Flexential gives us a competitive advantage because we’re able to answer those questions very well.”

While audit standards and control and interpretation of compliance levels vary from organization to organization, the majority of Copytalk customers require controls be in place as a condition of doing business. With these controls provided by Flexential, Copytalk can not only retain existing clients, but also attract new ones. In the past, Copytalk had never promoted its data centers to help bring in prospective business, but now that the company is working with Flexential, its data center plays a larger part in its business strategy.

Going forward, the company will continue its approach to innovative documentation services. Maree Moscati, Copytalk's chief executive officer, believes security and regulatory protocols will continue to get tougher, and Copytalk will likely address the increased demand by adding extra layers of security where possible.

The synergies gained between Flexential and Copytalk provides Moscati with confidence that the company can respond to large enterprise clients with certainty. When asked what she'd tell businesses considering Flexential, Moscati said, "Sign up now. Just do it. You won't be disappointed. Flexential is the best of the best."

"I am proud that we made the decision to move to Flexential. They take what they do as seriously and as precisely as we do," said Moscati. "That allows me to put another caveat on what sets us apart from other companies, and more often than not we are awarded the business."

**Maree Moscati**  
CHIEF EXECUTIVE OFFICER  
Copytalk

## ABOUT FLEXENTIAL

Flexential empowers the IT journey of the nation's most complex businesses by offering flexible and tailored solutions in colocation, cloud, data protection, managed and professional services. The company builds on a platform of three million square feet of data center space, in 20 highly connected markets and the FlexAnywhere™ 100GB private backbone, to meet the most stringent challenges in security, compliance and resiliency. Visit [www.flexential.com](http://www.flexential.com).

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