IRON MOUNTAIN®

Modernizing financial document management for AI-discovered insights and compliance

Executive summary

Financial institutions are under pressure to modernize decades of physical and digital documents. The stakes are high, compliance is tightening, legacy systems slow everything down, and AI has become essential.

That's where Iron Mountain InSight® Digital Experience Platform (DXP), built on AWS, comes in. It helps financial institutions turn decades of documents into AI-powered insights that reduce risk, automate compliance, and deliver faster access to critical information, accelerating data readiness for AI adoption.

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What's holding financial institutions back?

Financial institutions face a wave of transformation and rising pressure to modernize how they manage, secure, and act on information. From regulatory scrutiny to operational complexity, the demands on teams have never been greater.

Regulations are constantly evolving

Modern compliance means more than checking boxes once a year. Frameworks like GLBA, GDPR, FCRA, SOX, the EU AI Act, and newly passed state AI regulations, demand real-time governance, lifecycle traceability, and proof of secure data handling. The cost of failure? Fines, legal exposure, and lost trust.

Outdated systems = bottlenecks

Manual reviews, disconnected records storage, and messy retention rules slow everything down. Prepping for an audit? Painful. Finding a file? Time-consuming. That friction increases risk, consumes time, and frustrates your customers and internal teams.

AI is essential, not optional

Data keeps growing, but headcount doesn't. Efficiency demands more with less. Without automation, it's impossible to keep up. Financial institutions need AI to classify content, extract insights, and enforce policy quickly and consistently. But that depends on data readiness for AI adoption, having clean, structured, and accessible documents and information that AI systems can act on. InSight DXP helps them do just that.

What is Iron Mountain InSight DXP?

InSight DXP is a secure, cloud-native SaaS platform that helps financial institutions take control of unstructured data and drive intelligent decision-making.

The platform connects to your core business systems and ingests digital and physical documents from upstream feeds. As content is captured, InSight DXP applies advanced AI, including generative and agentic models, to extract key data, add context, and surface insights instantly. Specialized AI agents can respond to natural language queries, generate summaries or visuals, and deliver answers directly to stakeholders, speeding up everything from audits to approvals.
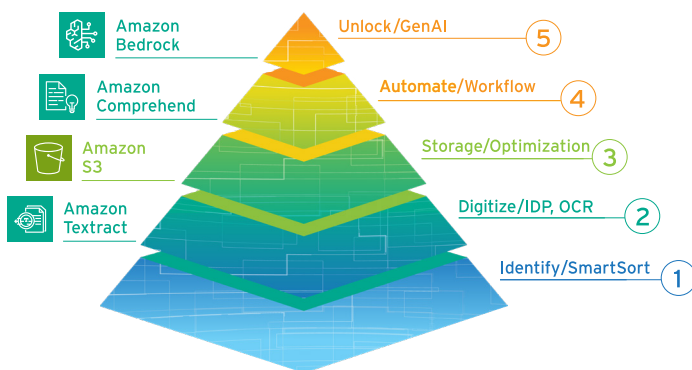
InSight DXP also enables end-to-end lifecycle management. Every document is tracked from intake to defensible deletion, with audit logs, retention policies, and integrated governance controls that support compliance and data readiness for AI adoption.

The modular platform includes intelligent document processing, workflow automation, and both digital and physical records management, so you can build the right solution for your environment and scale as your needs evolve.

Whether you're managing decades of legacy files or handling 10,000 new documents a day, InSight DXP gives you the clarity, speed, and control to modernize how work gets done.

No manual tagging. No missed records. Just fast, accurate access across all your content.

Unique value:
AWS + Iron Mountain

> 70+ years of experience in document management, global footprint with 135 digitalization processing sites.

> Security and chain of custody across assets - regardless if physical or digital in nature.

"Policy center was an immense weight off our shoulders in trying to map the documents to the citations. There is no way the internal group could have gotten it done on their own."

Johanna Downey, Compliance Officer, Purdue Federal

Architecture and capabilities

InSight DXP is built to meet the complex demands of financial institutions by combining AWS scalability, AI-powered automation, and integrated governance, on a secure, cloud-native platform

Flexible ingestion

Pull in documents from batch uploads, legacy systems, SFTP, APIs, or scanners. Files land securely in Amazon S3 using your preferred model: multi-tenant or physically isolated. InSight DXP now also supports deeper integrations with platforms like SharePoint Online, helping you identify redundant, obsolete, or trivial (ROT) content without migrating files first.

Smart automation with specialized AI agents

AI tools like Textract, Comprehend, and Rekognition classify content and extract key metadata, while Retrieval-Augmented Generation (RAG) brings deeper insight into documents. The latest release introduces agentic AI, task-specific agents that answer natural-language questions, surface sensitive content like PII across languages, and summarize large volumes of data instantly. No complex queries. No manual reviews. Just answers, fast.

Built-In governance with policy center

Retention policies are no longer a bolt-on. InSight DXP now embeds Iron Mountain Policy Center directly into the platform, turning governance into a built-in safeguard. Policies can be automatically applied based on document type or content analysis. With defensible deletion, audit logs, and access to pre-built retention libraries, organizations can simplify compliance and reduce manual overhead across Legal, IT, and business teams.

Secure by design

InSight DXP uses TLS 1.2+, AES-256 encryption, and role-based access to protect your data. Human-in-the-loop reviews and prediction logs build trust in the AI. Enhanced version control and support for more file types, including Microsoft formats and complex image types, improve usability across teams.

System integration

REST APIs and low-code connectors integrate with core banking and insurance platforms. New capabilities support real-time document quality checks, streamlined routing, inventory analytics, and audit dashboards, making it easier to ensure complete, compliant document binders and unified reporting.

Hybrid visibility across digital and physical records

For customers storing physical records with Iron Mountain across the world, InSight DXP now offers a single-pane-of-glass view. Manage metadata, view inventory, and place file delivery orders directly from the platform, bridging digital and physical content with unified oversight.

InSight DXP provides a future-ready foundation for financial document and data management. With intelligent automation, embedded governance, and unmatched hybrid visibility, it helps institutions accelerate data readiness for AI adoption, and stay compliant every step of the way.

Compliance and risk covered

InSight DXP is designed to meet and exceed the strictest data protection, compliance, and audit-readiness requirements facing financial institutions today. Its foundation is built on adherence to global frameworks, including the NIST Cybersecurity Framework, FFIEC, GDPR and the platform has received ISO 27001 and SOC 2 Type 2 certifications.

Built-In safeguards

› Multi-factor authentication

› Enforced least-privilege access

› Real-time monitoring for anomalous events

› Automated vulnerability and container scans

Incident-ready

A dedicated incident response team handles rapid detection and recovery, meeting RTO/RPO targets for Tier 1 workloads.

Audit-ready workflows

Detailed logs and defensible deletion make audits easier. Clients can track every document across its lifecycle, from ingestion to secure deletion.

One customer reported a

25%

drop in audit prep time and noted the platform's ability to

"ensure we aren't in a position to get fined."

- COO at a financial services organization

Deployment and AWS Marketplace access

InSight DXP is available via [AWS Marketplace](#) Private Offers, streamlining procurement and enabling the use of committed AWS spend.

Deployment models

Most choose multi-tenancy for cost efficiency and scalability. Single-tenant deployments provide physically isolated storage, compute, and networking, ideal for banks or jurisdictions with stricter regulations.

Fast onboarding

Iron Mountain provides white-glove setup, including integration support, document ingestion, and retention mapping. Pre-built connectors and open APIs speed up time-to-value.

Whether a financial institution, insurance organization, a regional credit union, or a global bank, Insight DXP gives you the flexibility and control to modernize at your own pace.

AI innovation that's practical

InSight DXP brings AI-driven document intelligence to the heart of financial services operations. By combining traditional machine learning with emerging Generative and Agentic AI capabilities, the platform helps organizations unlock insights, automate classification, and reduce manual overhead.

The Massachusetts Technology Leadership Council (MTLC) recently awarded Iron Mountain's InSight Digital Experience Platform (DXP) its Tech Top 50 Award in AI Implementation.

Learn more ⟫

Smarter document intelligence

InSight DXP applies zero-shot and fine-tuned AI models to document classification, metadata extraction, redaction, and anomaly detection tasks. RAG pulls from your documents to generate precise, contextual results.

Custom AI, controlled by you

AutoML tools, data labeling interfaces, and prompt engineering make it easy to tailor models without sharing customer data.

Workflow and business rules

Extracted data can be run against business rules to ensure accurate and complete document packages. Missing Document Lists and Data Checks trigger workflows for streamlined resolution.

Future-ready innovation

Iron Mountain is expanding Generative and Agentic AI features like summarization, compliance automation, trend detection, and guided compliance reviews, which are designed to shorten audit cycles and speed up decision-making. Build Agents quickly to analyze documents, triage exceptions and accelerate business critical processes - from underwriting to servicing to claims administration.

Everything is explainable, traceable, and compliant at speed, allowing you to manage volume fluctuations in your operations.

Real-world use cases

Financial institutions are turning to Iron Mountain to solve real, high-stakes challenges across document-centric processes, accelerating customer facing digital transformation. InSight DXP supports a wide range of financial services scenarios with a common thread: reducing risk, improving efficiency, and delivering compliant outcomes.

Is your financial organization ready to harness the power of AI and unstructured data?

Learn more »

Customer story:

Tier 1 U.S. Bank

Processes over **10,000** documents daily using InSight DXP. Results: **25%** faster audit prep, **40%** faster record access, and **higher confidence in compliance.**

Loan processing

Speeds up classification, retention, and audit prep across the loan lifecycle - from application to payoff.

Know Your Customer (KYC)

Uses AI to extract and verify ID documents, automatically flagging missing or mismatched records.

"When rules change, I don't have to do the research, I just say, OK, let's apply that to all our records."

Johanna Downey, Compliance Officer, Purdue Federal

Claims review

Makes fraud detection and audit prep faster with lifecycle tracking and automated classification.

Customer story:

Purdue Federal Credit Union

Used InSight DXP and Policy Center to automate purging, cut legal risk, and reduce team burden.

"It's compliant with what we need today, but it's flexible enough to adapt to changes in the future."

Amy Keith, Physical Security Officer and Business Continuity Plan Manager at Purdue Federal

What's coming next

Iron Mountain continues to expand the InSight DXP platform to help financial institutions scale securely, stay audit-ready, and confidently navigate an evolving regulatory environment.

Upcoming enhancements are focused on delivering more intelligence, more control, and more value through the following priorities:

Generative AI tools

Summarization, document comparison, and compliance reviews.

Agentic AI framework

Build agents to automate repeatable, cumbersome tasks.

Read more about intelligent document processing powered by agentic AI.

Learn more >>

Low-code access

Simpler ways to manage classification, document management and retention.

More integrations

Deeper support for core banking and insurance platforms.

Better reporting

Self-serve dashboards and exportable audit logs.

Regulatory alignment

Updates for CCPA, EU AI Act, and regional data residency.

InSight DXP is built to keep pace with your needs and the industry's future.

Conclusion and next steps

Iron Mountain and AWS help financial institutions modernize digital and physical data, securely and intelligently.

With InSight DXP, you can instantly automate processes, streamline retention and audits, and access and organize data and documents, laying the groundwork for data readiness for AI adoption. It's available exclusively via **AWS Marketplace** Private Offers, so getting started is fast and procurement-friendly.

Start reducing risk and improving audit readiness today

To see how **InSight DXP** can support your team's next step toward modernization, **book a demo** or **contact your Iron Mountain representative** to explore deployment options tailored to your environment.

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About Iron Mountain