



What is Liveoak?

Liveoak helps enterprises and their customers complete complex paperwork and forms. Liveoak recreates the power of a face-to-face meeting via simple video conferencing, co-browse and electronic signature.

Our Most Important Features

Co-browse & Collaborate

Co-browse the web, collaborate and conference with your customers to provide live document support

Capture Your Conference and Compliant Data

Track and store data down to the keystroke for compliance and audit trail

Lay Eyes on Your Customer/Know Your Customer

Verify customer identity and reduce fraud through real-time photo/video I.D. capture

Increase Accuracy and Completion

Reduce missing and incorrect information in account applications and forms (eliminate Not in Good Order – NIGO)

Get a Secure Signature

In session electronic signature and fulfillment powered by DocuSign

Bank-grade Security

Your connection to Liveoak is secure and encrypted using SSL (secure socket layers) bank-grade security

Our Full List of Features

Digital Business Tools

Collaboration

Fill in forms directly with your customers in real time

Video conferencing

Enable video, voice or text chat directly through your browser, no downloads or plug-ins required

Co-browse

Browse the web together with your customers

Screenshare

Share your screen with your customers

Live eSignature

Complete and sign paperwork inside your Liveoak session through our DocuSign integration

File upload

Add supplemental files such as photos or voided checks to your Liveoak conference

Security, Fraud & Compliance

Bank-grade security

Protect your data and documents through our comprehensive approach to security and privacy

Identity authentication

Reduce fraud by verifying customer identity through photo/video I.D. capture

Compliant audit trail

Record all session data and keystrokes for compliance

Digital Customer Experience

Cutting edge, browser-based platform

Built with WebRTC means no downloads or plug-ins required

Device-agnostic

Use the Liveoak platform with desktop, tablet or mobile

Omni-channel communication

Offer multiple channels of communication to your customers: voice, text chat, video conference

Digital workflow

Complete paperwork fast by eliminating the need to use fax, scan, email

Electronic document routing

Send completed documents via email to all parties automatically through Liveoak

CRM integration & data capture

Collect & send customer data directly to your database

Paperless forms

Work smarter with the most updated, digital version of your forms and documents

Forms library

Access all templates & forms through your DocuSign library

Easy meeting set-up

Invite your customers to join your Liveoak session with a simple link

Virtual meeting room

Set up private meeting rooms for you & your customers to access on demand

For questions, or to schedule a demo or conversation, please email hello@liveoak.net.