

# Document Intelligence (DI)

Unlocking insights from business documents

The better the prompt. The better the answer.  
The better the world works.



Shape the future  
with confidence



Microsoft

## Business drivers

- Organizations often need to review, process and interpret an ever-growing number of structured and unstructured documents.
- To avoid being overwhelmed, they must quickly, consistently, accurately extract and interpret the information trapped in these documents. This can be a very labor intensive, time-consuming and costly process.
- If they are unable to keep pace, customer experiences degrade, business opportunities are missed, and exposure to legal and regulatory risks increases exponentially.

## Solution overview

The Document Intelligence (DI) solution incorporates EY extensive knowledge of business documents and leading-edge artificial intelligence (AI) technologies, along with other tools to read, interpret and act on valuable insights derived from information in our clients' vast array of business documents. It leverages advanced technologies, including generative AI (GenAI) and AgentAI, to automate and enhance document management processes.

## Solution benefits

The DI platform helps organizations unlock insights from a wide range of key business documents while substantially reducing review and processing time. The DI platform has helped clients:

- Reduce document review and processing time by 90%
- Decrease costs by 80%
- Cut risk by 20%
- Increase processing accuracy by 25%
- Improve consistency by 50%

### Digitize

Platform gathers and digitizes documents via optical character recognition (OCR).

### Suggest

Artificial intelligence (AI) suggests place holders and highlights key sections and concepts.

### Confirm

Teams review suggestions and confirm data during training.

### Extract

Outputs are extracted and stored for analytics.

## Shorten time-to-value with pre-trained document lenses

The DI platform makes use of lenses that are self-contained, pre-trained machines that work directly with specific document types. These lenses are trained using EY vast knowledge base of business documents and applied within the DI platform to accelerate the ingestion and interpretation of specific document types.

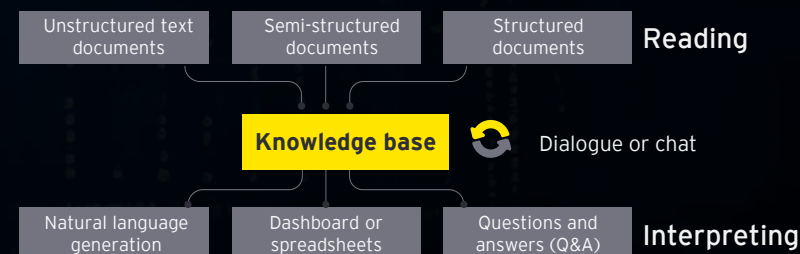
### Generally-available

Supplier contracts
Software license agreements
Research and development (R&D) notes
Digital distribution contracts
Enterprise marketing material automation (EMMA) and review
Know-your-customer (KYC) and institution onboarding for Azure machine learning (AML)

### In preview

Maintenance logs	Accounts payable invoices
US Medicaid drug invoices	Over-the-counter (OTC) order input
Digital media edit sheets	Drug ad declarations
Investment book of records (IBOR) remediation	Structured finance - Automated loans due diligence
Home mortgage disclose act (HMDA)	Collateral management - Credit support annex contract analysis
Signature cards detection	

In addition to these pre-trained lenses, EY teams can build custom lenses that address your specific document challenge.



## Solution differentiators

The DI platform offers:

- Pre-trained document lenses for specific document types
- Custom lens creation tailored to specific document challenges
- Integration of the EY organization's extensive knowledge of document management with AI technologies of Microsoft

## Joint value proposition

Teaming with Microsoft generates value for clients by:

- Combining the EY organization's deep insights and experience in disruptive industry trends with the scalable cloud platform of Microsoft
- Enabling organizations to accelerate digital transformation and enhance business performance

## Case study

Document Intelligence techniques combined with intelligent automation: a global telecommunications, media and technology (TMT) company needed an intelligent document management solution to help streamline operations and improve data extraction.

Client challenge	Engagement summary	Value provided
<ul style="list-style-type: none"><li>▪ The client faced significant challenges in managing a vast array of unstructured documents across various business processes.</li><li>▪ Traditional methods of document handling were inefficient, leading to delays in information retrieval and increased operational costs.</li><li>▪ The complexity of interpreting diverse document formats and extracting relevant data manually posed a substantial barrier to productivity.</li><li>▪ Additionally, the client sought to enhance their overall business process automation strategy, aiming to streamline operations and improve accuracy in data handling.</li></ul>	<ul style="list-style-type: none"><li>▪ In response to these challenges, EY teams initiated an on-premise implementation of Document Intelligence as a comprehensive corporate solution.</li><li>▪ This engagement focuses on intelligent document management, leveraging advanced AI techniques to automate the extraction of pertinent information from unstructured documents.</li><li>▪ The project is part of a broader initiative aimed at automating business processes through robotics process automation (RPA) technologies.</li><li>▪ Since 2019, the EY organization has been leading this extensive robotization project within the Spanish companies segment, positioning it as the largest initiative of its kind in Europe based on the number of robots designed and deployed.</li></ul>	<ul style="list-style-type: none"><li>▪ The implementation of Document Intelligence has provided substantial value by transforming the way the client manages documents.</li><li>▪ By automating the extraction and interpretation of data, the solution has significantly reduced processing times and reduced errors associated with manual handling.</li><li>▪ This improvement not only improves operational efficiency but also allows employees to focus on higher-value tasks, fostering innovation and strategic decision-making.</li><li>▪ Furthermore, the integration of RPA technologies has streamlined various business processes, contributing to a more agile and responsive organizational structure.</li><li>▪ Overall, the engagement has positioned the client to achieve greater scalability and adaptability in their operations, helping ensure they remain competitive in a rapidly evolving market.</li></ul>

## Contacts

### EY



**Jose Maria Lucia Moreno**  
Partner/Principal  
Technology Consulting  
EY Transforma Servicios de Consultoría, S.L.  
[josemaria.luciamoreno@es.ey.com](mailto:josemaria.luciamoreno@es.ey.com)

### Microsoft



**Jodi Lustgarten**  
Microsoft Alliance Director  
Microsoft Corporation  
[jodise@microsoft.com](mailto:jodise@microsoft.com)

**EY and Microsoft: helping the world work better to achieve more**

Every day, throughout the world, businesses, governments and capital markets rely on EY business ingenuity and the power of Microsoft technology to solve the most challenging global issues with extraordinary, transformative outcomes.

EY and Microsoft bring a compelling formula to spark the potential of the cloud and unlock the power of data. We solve our clients' most challenging issues by blending trusted industry experience with innovative cloud technology. Our strategic relationship draws on decades of success developing visionary solutions that provide lasting value.

**Together, we empower organizations to shape the future with confidence.**

For more information, visit: [ey.com/microsoft](https://ey.com/microsoft)

## EY | Building a better working world

EY is building a better working world by creating new value for clients, people, society and the planet, while building trust in capital markets.

Enabled by data, AI and advanced technology, EY teams help clients shape the future with confidence and develop answers for the most pressing issues of today and tomorrow.

EY teams work across a full spectrum of services in assurance, consulting, tax, strategy and transactions. Fueled by sector insights, a globally connected, multi-disciplinary network and diverse ecosystem partners, EY teams can provide services in more than 150 countries and territories.

All in to shape the future with confidence.

EY refers to the global organization, and may refer to one or more, of the member firms of Ernst and Young Global Limited, each of which is a separate legal entity. Ernst and Young Global Limited, a UK company limited by guarantee, does not provide services to clients. Information about how EY collects and uses personal data and a description of the rights individuals have under data protection legislation are available via [ey.com/privacy](https://ey.com/privacy). EY member firms do not practice law where prohibited by local laws. For more information about our organization, please visit [ey.com](https://ey.com).

© 2025 EYGM Limited.  
All Rights Reserved.

EYG no. 006609-25Gbl  
ED None

This material has been prepared for general informational purposes only and is not intended to be relied upon as accounting, tax, legal or other professional advice. Please refer to your advisors for specific advice

[ey.com](https://ey.com)