

## Why System Integrators Win with DataMotion

**Secure, Intelligent Transformation, Microsoft Co-Sell Alignment, and Responsible AI for the Microsoft Cloud**

Win more deals and deliver high-value outcomes by leveraging DataMotion for Microsoft Cloud. Our secure, AI-ready platform empowers System Integrators to streamline workflows, enhance compliance, and accelerate intelligent transformation for enterprise clients.

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

# Forward

Secure Interactions. Governed AI. Accelerated Wins.

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## To Microsoft-Aligned System Integrators,

Modern clients in regulated industries expect more than digital transformation—they demand secure, compliant, AI-ready workflows deeply integrated into the Microsoft Cloud. Yet native tools often fall short for external messaging, secure forms, document exchange, and AI governance. DataMotion for Microsoft Cloud bridges these gaps.

Built natively on Azure and available via the Marketplace, DataMotion empowers SIs to:

- ✓ **Drive Fabric Adoption:** JenAI Connect securely feeds high-value "dark data" (from messages, forms, docs) into Microsoft Fabric for AI, analytics, and business insights.
- ✓ **Deploy Responsible AI:** Extend Copilot with secure, compliant human-in-the-loop workflows via JenAI Assist—enabling expert escalation for sensitive scenarios without shadow AI risk.
- ✓ **Unblock Compliance-Critical Workflows:** Address HIPAA, FINRA, SEC 17a-4, and GDPR requirements out-of-the-box with our Secure Message Center, Smart Secure Forms, and SDE.
- ✓ **Accelerate Co-Sell & MACC Wins:** As a transactable, MACC-eligible ISV, DataMotion helps field sellers retire quota, simplifies procurement, and supports SI-led growth across industries.

This white paper outlines how SIs are using DataMotion to modernize client interactions in healthcare, financial services, and insurance—driving measurable value on top of Microsoft 365, Dynamics 365, Entra ID, and Microsoft Fabric.

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# Executive Summary

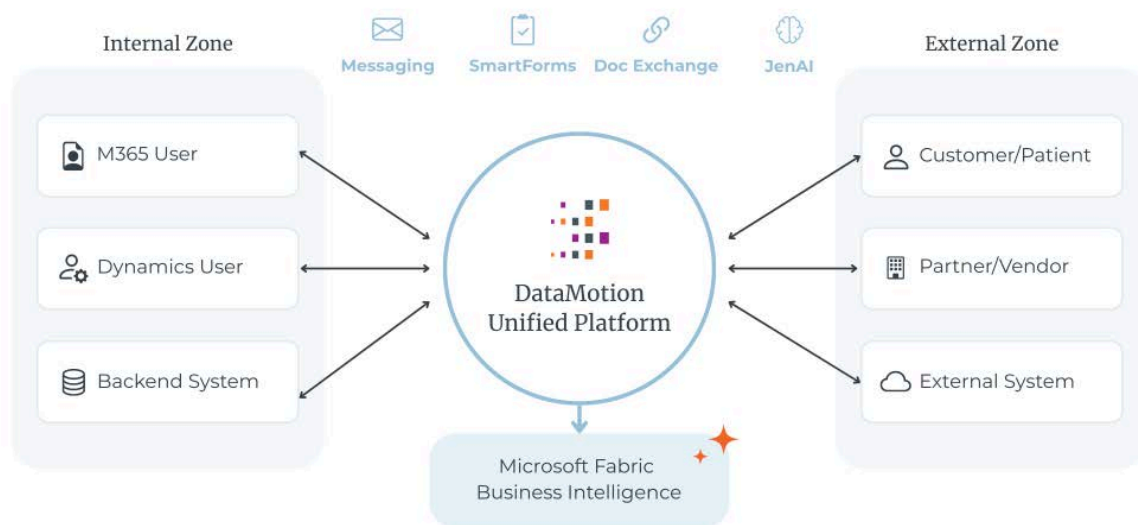
Clients across financial services, healthcare, and insurance are moving beyond digital transformation. Today, they're demanding intelligent transformation—secure, compliant, and insight-driven workflows that enhance operational efficiency, ensure regulatory alignment, and build customer trust.

In regulated sectors, digital engagement is now a strategic differentiator. Organizations must modernize how they engage clients, manage sensitive data, and prepare for secure AI integration—while minimizing risk and audit exposure.

For System Integrators (SIs), this moment represents a strategic opportunity. Clients are investing in Microsoft 365, Dynamics 365 (D365), and Azure—but encountering native limitations in secure messaging, digital forms, file exchange, and AI orchestration. That's where DataMotion fits in.

**Purpose-built for regulated industries and transactable via the Microsoft Azure Marketplace, DataMotion for Microsoft Cloud enables SIs to:**

- ✓ Replace fragmented SaaS with a unified, AI-ready PaaS
- ✓ Securely connect organizations and customers through compliant, integrated workflows
- ✓ Turn "dark" interaction data into business intelligence via Microsoft Fabric
- ✓ Accelerate co-sell wins and simplify procurement with MACC-aligned offers



## Key Takeaways:

- ✓ Solve Microsoft-native gaps (OME friction, SharePoint complexity, Power Pages follow-up issues)
- ✓ Drive intelligent transformation with governed AI tools (JenAI Assist, Connect, Insights)
- ✓ Extend Microsoft 365, Dynamics 365, and Copilot with embedded, secure external interaction capabilities
- ✓ Win in regulated industries by aligning with HIPAA, FINRA, SEC 17a-4, and GDPR
- ✓ Leverage MACC eligibility and co-sell status to simplify deals and boost win rates

This white paper explores how SIs serving regulated industries can collaborate with DataMotion to deliver meaningful business outcomes—transforming high-risk, high-friction workflows into secure, intelligent experiences.

## 2. Market Dynamics & the SI Opportunity in Regulated Industries

Organizations across financial services, healthcare, and insurance face mounting pressure to modernize how they engage clients, manage sensitive communications, and prepare for the next wave of intelligent transformation. Yet while these industries invest heavily in Microsoft 365, Dynamics 365, and Azure to power internal operations, external interactions remain fragmented, insecure, and resistant to automation.

### Key Market Signals:

- ✓ 78% of financial firms anticipate increased regulatory scrutiny on digital communication channels *(Source: Security Magazine, 2024)*
- ✓ HIPAA and GDPR mandates are intensifying expectations for secure patient and customer communications
- ✓ SEC Rule 17a-4 and FINRA retention requirements are forcing firms to rethink how they manage client messaging and documentation
- ✓ Digital-first expectations are accelerating—patients, policyholders, and investors want faster, more secure digital engagement
- ✓ AI adoption is growing fast, but securely operationalizing AI (especially with regulated data) remains a key challenge

## Why System Integrators are Essential Now

Microsoft provides the digital foundation—DataMotion enables the secure, compliant, and insight-ready workflows SIs need to deploy on top of it.

SIs are uniquely positioned to:

- ✓ Replace legacy SaaS tools with a unified, Microsoft-native secure interaction platform
- ✓ Embed compliant, AI-powered workflows into client-facing layers (portals, CRMs, Copilot)
- ✓ Turn secure external interactions into AI/analytics pipelines for Microsoft Fabric
- ✓ Help clients unlock MACC budgets and speed through Microsoft procurement

This is an inflection point. Regulated industries are demanding intelligent transformation. Microsoft provides the foundation. SIs deliver the last mile.

78%

of financial firms anticipate increased regulatory scrutiny on digital communication channels.

*(Source: Security Magazine, 2024)*

## 3. Bridging Microsoft Gaps in Regulated Workflows

Microsoft's platforms—Microsoft 365, Dynamics 365, Azure, and Copilot—offer exceptional scalability and productivity. But when applied to externally facing workflows in regulated industries, notable gaps emerge:

Native Microsoft Tool	Common Limitation	DataMotion + SI Advantage
<b>Outlook + OME</b>	Email portal fatigue, lack of audit-friendly threading, compliance complexity	<b>Secure Message Center (SMC):</b> Embedded in portals and apps. Enables encrypted, auditable conversations that meet SEC, HIPAA, and GDPR policies.
<b>Microsoft Forms / Power Pages</b>	Lacks secure file intake, audit trails, or integrated follow-up capabilities	<b>Smart Secure Forms:</b> Drag-and-drop builder with pre-fill APIs, secure file upload, and AI-generated forms. Perfect for onboarding, claims, or patient intake.
<b>SharePoint / OneDrive (External)</b>	Complex permissions; not optimized for large, secure client uploads	<b>Secure Document Exchange (SDE):</b> Purpose-built for compliant document transfer—ID verification, disclosures, medical forms, etc.
<b>Copilot + Fabric (Native)</b>	Lacks secure external interaction or governed escalation for regulated data	<b>JenAI Assist:</b> Enables AI-assisted self-service with secure escalation to human advisors—preserving context, security, and compliance.
<b>Azure AI + Microsoft Fabric</b>	Structured data from client-facing workflows is hard to ingest into Fabric	<b>JenAI Connect:</b> Transforms interaction data (from forms, files, chats) into AI-ready pipelines for analytics and insights.

### Bonus Insight for SIs:

Trying to force-fit native Microsoft tools into high-risk external workflows often results in:

- ✓ Compliance gaps (HIPAA, SEC/FINRA, GDPR)
- ✓ Disconnected experiences across channels
- ✓ Missed AI/BI opportunities due to siloed interaction data
- ✓ Slower procurement and longer sales cycles

**DataMotion solves all of that—enhancing Microsoft tools without replacing them.**

## 4. The DataMotion Platform: A Unified Toolkit for Secure, Insight-Ready Interactions

SIs serving regulated industries understand the risks of patching together siloed tools for messaging, file exchange, forms, and AI. It's inefficient, increases compliance risk, and inhibits scalable transformation.

**DataMotion for Microsoft Cloud** replaces these fragmented SaaS tools with a unified, Microsoft-native Platform as a Service (PaaS) purpose-built for regulated industries. Whether your clients operate in financial services, insurance, or healthcare, DataMotion powers secure, intelligent transformation across every stage of the client journey.

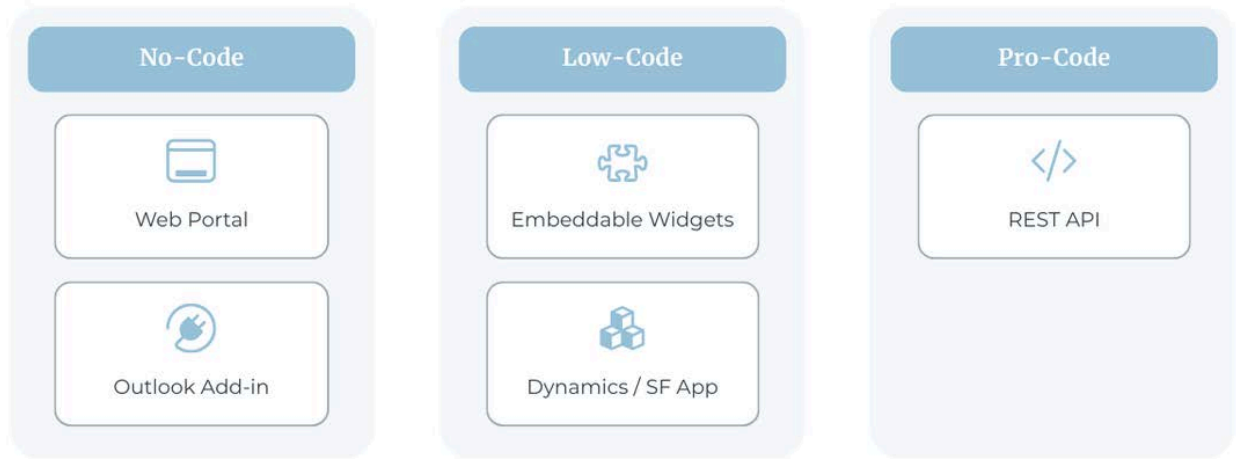
### Platform Components Table:

Component	What It Does	Why It Matters in Regulated Industries
<b>Secure Message Center (SMC)</b>	Encrypted, threaded messaging embedded in portals, Dynamics, or advisor apps	Replaces OME for external workflows. Meets SEC 17a-4, HIPAA, GDPR. Enables seamless advisor-patient-client exchanges.
<b>Smart Secure Forms</b>	Drag-and-drop builder with conditional logic, secure file upload, pre-fill APIs	Eliminates PDFs, reduces NIGO. Ideal for onboarding, claims, and patient intake workflows.
<b>Secure Document Exchange (SDE)</b>	Compliant, auditable file transfers with encryption and tracking	Handles ID verification, claims documentation, lab results, or disclosures—without risky email portals.
<b>JenAI Suite (Assist, Connect, Create, Insights)</b>	Add-on AI tools for secure self-service, Fabric ingestion, form creation, and insight surfacing	Brings AI into regulated workflows securely. Transforms messages, forms, and files into intelligence-ready assets.



## Flexible Deployment Options

SIs can tailor delivery models to match client needs, integration maturity, and tech stack:



- ✓ **No-Code:** SaaS portals, Smart Secure Forms designer, Outlook/Gmail Add-ins
- ✓ **Low-Code:** Embeddable widgets, pre-built UI components for portals and apps
- ✓ **Pro-Code:** Full REST APIs for deep integration into Dynamics, Genesys, Fabric, or proprietary systems

Whether modernizing claims workflows, onboarding patients, or embedding secure messaging in CRM portals—**DataMotion adapts to the SI-led implementation approach that fits.**

## Native Microsoft Cloud Integration

Microsoft Platform	Integration Highlights
<b>Microsoft 365</b>	Native Outlook Add-in; secure send/receive; MACC-aligned Marketplace listing
<b>Microsoft Entra ID</b>	Secure identity federation for internal and external users
<b>Dynamics 365</b>	Embedded messaging, Smart Secure Forms, and Secure Document Exchange (SDE) within case or service workflows
<b>Microsoft Fabric</b>	JenAI Connect transforms secure interactions into structured Fabric-ready datasets

## 5. Use Case Spotlights: How SIs Deliver Tangible Value in Regulated Industries

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System Integrators are under pressure to do more than configure tools—they're expected to deliver measurable outcomes. With DataMotion, SIs solve real-world pain points in financial services, insurance, and healthcare using modular, Microsoft-native capabilities.

### Use Case #1: Wealth Management – Client Onboarding

#### The Challenge:

Wealth Management firms often rely on PDF forms, email attachments, and disconnected portals for onboarding high-net-worth clients. This creates friction, delays, and regulatory risk (especially around FINRA/SEC recordkeeping).

#### The SI Solution with DataMotion:

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- ✓ Speed up onboarding with CRM-connected Smart Secure Forms
- ✓ Securely collect documents for ID and asset verification
- ✓ Enable in-portal messaging between advisors and clients
- ✓ Power insights and automation via Microsoft Fabric + JenAI Connect

#### The Outcome:

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- ✓ 30–50% faster onboarding
- ✓ Full encryption and audit logging for FINRA compliance
- ✓ Improved digital experience for clients and advisors
- ✓ Actionable onboarding analytics

## Use Case #2: Insurance – Claims Intake & Evidence Submission

### The Challenge:

Clients struggle to submit large files (e.g., photos, medical records), delaying claims processing and creating siloed communication channels.

### The SI Solution with DataMotion:

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- ✓ Embed Smart Secure Form for FNOL in the claims portal
- ✓ Use SDE for direct document uploads to claim records
- ✓ Manage adjuster-claimant-vendor communication via SMC
- ✓ Automate workflow handoffs via API to Guidewire or D365

### The Outcome:

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- ✓ Accelerated claims decisions
- ✓ Transparent, secure communications
- ✓ Centralized audit trail across documents, forms, and messages
- ✓ Improved compliance with privacy laws (GDPR, HIPAA)

## Use Case #3: Healthcare – Secure Patient Intake and Coordination

### The Challenge:

Healthcare providers often manage patient data through a mix of portals, PDFs, and unsecure communications, exposing them to HIPAA risks and operational bottlenecks.

### The SI Solution with DataMotion:

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- ✓ Use Smart Secure Forms for digital intake and insurance pre-auth
- ✓ Enable secure uploads of medical histories, lab results via SDE
- ✓ Allow front-desk or care coordinators to securely message patients via SMC
- ✓ Integrate JenAI Assist for patient FAQs and secure escalation to staff

### The Outcome:

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- ✓ Reduced paperwork and intake time
- ✓ HIPAA-compliant communication at every stage
- ✓ Increased patient satisfaction with digital options
- ✓ Rich interaction data captured for future insights via Fabric

## 6. Security, Compliance & the HITRUST Advantage

In financial services, healthcare, and insurance, compliance and data protection are more than regulatory requirements—they're deal-makers and deal-breakers. Every digital interaction must be secure, auditable, and aligned with evolving governance standards.

DataMotion for Microsoft Cloud is engineered for this reality. Built on Azure, certified by HITRUST, and designed around Zero Trust principles, it gives SIs the confidence to deliver secure, compliant solutions at scale.



*This certification provides a high degree of assurance that DataMotion meets complex compliance requirements by aligning with frameworks like HIPAA, NIST, ISO, and PCI DSS - simplifying compliance efforts for you and your clients.*

Control Area	What It Means for Regulated Industries
<b>Zero Trust Architecture</b>	Every access request is verified, scoped, and logged—essential for internal and external data exchange
<b>End-to-End Encryption</b>	TLS 1.3+ in transit, AES-256 at rest; with dynamic key management to prevent unauthorized decryption
<b>Granular Retention Policies</b>	Customizable to meet HIPAA, FINRA, SEC 17a-4, GDPR, and internal governance requirements
<b>Comprehensive Audit Logging</b>	Immutable logs across messages, forms, and files; enables proactive monitoring and faster audits
<b>Role-Based Access Control</b>	Fine-tuned permissioning by user role and data type; supports tiered access models
<b>HITRUST CSF Certified</b>	Independent verification across 40+ standards including NIST, ISO, HIPAA, PCI DSS

*Unlike point solutions, DataMotion applies these security controls consistently across its platform—messaging, forms, file transfers, and AI interactions. That means easier implementation, smoother audits, and stronger client confidence.*

## Key Benefit for SI-Led Deals

By leading with a HITRUST-certified, Azure-native platform that satisfies SEC, FINRA, HIPAA, and GDPR standards out-of-the-box, SIs can:

- ✓ Accelerate enterprise security reviews
- ✓ Increase confidence with risk and compliance teams
- ✓ Differentiate against point solutions
- ✓ Enable AI-powered workflows without introducing governance gaps

## 7. MACC, Marketplace, & Microsoft Co-Sell: Built for SI Velocity

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For SIs working in regulated industries, technical fit is only half the equation. The ability to streamline procurement, unlock MACC funds, and engage Microsoft field teams can make or break a deal—especially in enterprise environments.

**DataMotion for Microsoft Cloud** is aligned with Microsoft's commercial strategy, giving SIs the leverage to win more, move faster, and deepen client relationships within the Microsoft ecosystem.

**Key Benefit:** Aligning with solutions that are MACC-eligible and co-sell ready drastically simplifies the procurement process and fosters stronger collaboration within the Microsoft ecosystem, leading to faster client value.

Commercial Feature	Why It Matters
<b>MACC-Eligible</b>	Clients can use existing Azure Consumption Commitments to buy DataMotion—accelerating approval and reducing spend.
<b>Transactable Marketplace Listing</b>	Simplifies procurement—Microsoft handles billing, tax, and licensing on behalf of the client.
<b>Microsoft Quota Relief</b>	Microsoft field sellers receive quota credit for co-sell deals involving DataMotion, boosting incentive alignment.
<b>Partner Center Co-Sell Ready</b>	Listings are registered in Partner Center—SIs gain visibility, can register deals, and collaborate with Microsoft teams.
<b>Joint GTM Opportunities</b>	Access to co-marketing, events, and pipeline-building efforts with Microsoft and DataMotion.

*What This Means for SIs:*

*DataMotion isn't just a platform—it's a strategic lever to:*

- ✓ *Expand Microsoft-aligned services*
- ✓ *Reduce friction in procurement cycles*
- ✓ *Win support from Microsoft sellers*
- ✓ *Deliver regulated industry transformation with commercial velocity*

## Intelligent Transformation with Built-In Commercial Acceleration

Today's enterprise buyers often ask: "Can we purchase this with our MACC?"

**With DataMotion, the answer is a confident yes.**

SIs who lead with co-sell-ready, MACC-aligned solutions not only win faster—they win smarter.

## 8. Partnering for Success: Your Next Step in Secure Intelligent Transformation

System Integrators are already guiding clients through cloud migrations, digital upgrades, and AI adoption. But regulated industries need more than infrastructure—they need intelligent workflows that are secure, compliant, and built to scale with Microsoft.

That's where **DataMotion for Microsoft Cloud** comes in.

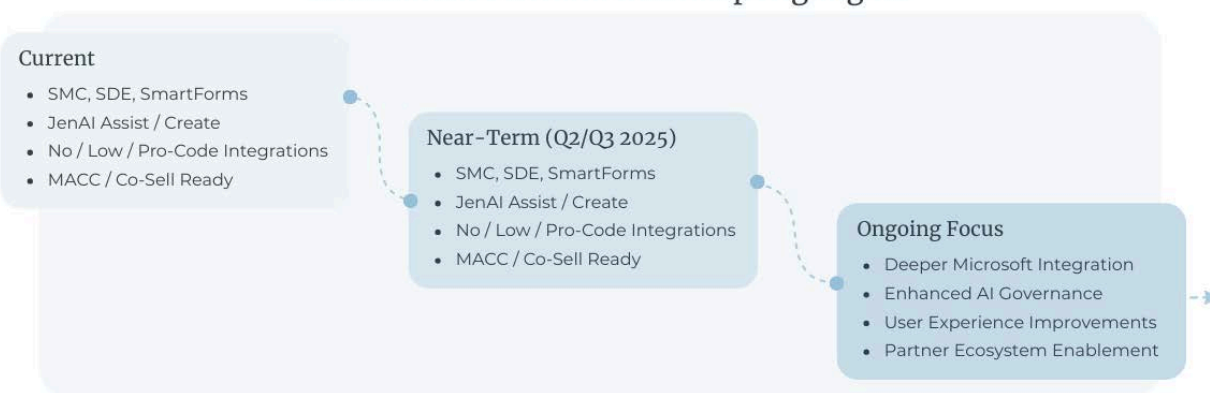
We don't replace Microsoft. We complete it.

And we're looking for smart, ambitious SIs ready to co-sell, differentiate, and win in financial services, insurance, and healthcare.

### What You'll Gain as a DataMotion SI Partner:

- ✓ **New Revenue Streams:** Package and deliver secure messaging, forms, file exchange, and AI—all integrated with Microsoft Cloud.
- ✓ **Accelerated Time to Value:** Deploy using no-code, low-code, or pro-code approaches to match client maturity and timelines.
- ✓ **Microsoft Field Alignment:** Collaborate with Microsoft sellers through Partner Center, drive co-sell deals, and access joint marketing.
- ✓ **AI-Driven Differentiation:** Operationalize GenAI securely within client workflows using JenAI Suite.
- ✓ **Compliance Confidence:** Deliver solutions that meet HIPAA, FINRA, SEC 17a-4, and GDPR requirements from day one.

### DataMotion Platform Roadmap Highlights





# Let's Build Together.

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Ready to differentiate your Microsoft practice and deliver secure, intelligent transformation? [Contact us](#) or email [sales@datamotion.com](mailto:sales@datamotion.com) to start the conversation.

Let's transform how the world communicates—securely and intelligently—with Microsoft and DataMotion.

## Schedule a Personalized Demo & Strategy Session:

Discuss your specific client opportunities, technical requirements, and how DataMotion aligns with your practice goals. See the platform tailored to relevant use cases.

[Book a Meeting](#)

## Need a quick summary to share with your team?

Read our blog post, "[The Missing Link in Microsoft Cloud Deployments for Regulated Industries: Intelligent Interactions](#)"

