

Chatham Financial partners with Indico Data to modernize intake and increase operational capacity 300%

Chatham Financial delivers risk management advice and technology to more than 3,000 organizations around the globe. To support that scale, the company must ingest and process tens of thousands of complex, unstructured documents each year. For its operations and technology leaders, the challenge was clear: modernize how work enters the business and eliminate manual intake steps that slow throughput and limit capacity.

Rather than relying on error-prone, manual review to manage document intake, Chatham partnered with Indico Data, the Intake & Orchestration Platform, to rebuild the front door of operations. By standardizing how work enters the enterprise and automating key review steps, Indico enabled Chatham to streamline workflows, increase throughput, and scale without adding headcount.

The challenge: manual intake slowing operations



When Chatham began its AI journey, the initial plan was to build its own automation platform. The team experimented with open-source tools, labeled documents, and attempted to construct a custom natural language processing stack.

But building and maintaining an enterprise-grade ingestion engine from scratch proved

impractical. The time, specialized skills, and ongoing tuning required would have diverted resources from core initiatives. The variability and unstructured nature of their documents also meant templated or rules-based approaches would not scale.

Documents still required multiple human reviews, creating a “six eyes” process where three people had to manually read and extract information. Backlogs built up, processing slowed, and valuable expertise was consumed by repetitive intake tasks instead of higher-value work.

The goal: modernize the front door of operations



For Chatham’s CIO and operations leaders, the objective was to move to a centralized platform that would not only accelerate processes, but also standardize how work entered the business and deliver clean, system-ready data downstream.

Rather than building brittle tools internally, the company sought a purpose-built solution that could reliably ingest, enrich, and orchestrate operational work across systems while empowering process owners directly.

The solution: an intake and orchestration layer built for scale



Chatham found what it needed in Indico Data. Indico demonstrated that with as few as **200 training samples**, the platform could quickly understand complex documents and deliver production-ready accuracy. After evaluating build-versus-buy options, Chatham selected Indico for a proof of concept.

With Indico acting as the ingestion and orchestration layer, confirmations are automatically read, critical fields extracted and validated, and clean outputs delivered directly into downstream workflows and systems. Subject matter experts now review only exceptions rather than every document.

Indico gives Chatham an intuitive interface that allows process owners and operations leaders to configure and improve workflows directly, reducing reliance on scarce technical resources and enabling faster iteration across teams.

“Indico gives our senior product and operations leaders direct control over automation. With Indico’s expertise and just a few hundred documents, we’ve been able to operationalize capabilities that would have taken years to build ourselves.”

— Andrew Thornfeldt, Chatham Financial

The results: higher throughput with fewer manual steps



As an initial use case, Indico automated one step of a common document review workflow, **saving 15 minutes of processing time** for each document.

The impact was immediate:

- **75% reduction in processing costs**
- **300% increase in capacity**
- **4x overall throughput**

Backlogs that once stretched into the thousands were cleared in a single day. What previously required significant manual effort now moves continuously through the system.

Instead of having three reviewers manually process each document, Indico removed an entire step while maintaining control and accuracy.

Scaling success across the business

Today, more than fifty internal users actively work in the Indico platform. Business users and technical teams collaborate on a shared system to continuously improve workflows.

Chatham now supports five production use cases with five more planned, while adding only one data science employee. Teams across accounting, transaction processing, and client onboarding rely on Indico to keep work moving, increasing output without proportionally increasing headcount.

Looking ahead, the company is extending automation upstream and downstream, orchestrating work from the moment a document is received through final review and system updates.

By rebuilding the front door of operations, Chatham has created a foundation that continuously improves efficiency, accuracy, and capacity — turning operational workflows into a strategic advantage rather than a bottleneck.