

Business Process Automation Case Study

Process: Client Onboarding

CLIENT: Technology Firm

SUMMARY

A technology firm faced significant challenges in its client onboarding process, including manual data compilation across multiple systems, resulting in inefficiencies and errors. The convoluted and time-consuming process led to a negative client perception. To address these issues, the firm implemented a centralized data-entry hub and automated updates across all systems. This solution resulted in the resolution of challenges, a 2.5-hour reduction in manual data entry per client, improved client experience, enhanced data accuracy, strengthened client relationships, and fostered trust among clients and employees. The streamlined process paved the way for enhanced collaboration and the establishment of enduring, long-term relationships.

CHALLENGES

- Manual compilation and entry of data across various systems (CRM, Accounting System, 3rd Party Systems, Internal Proprietary Systems, and File Sharing Locations)
- Inefficiencies, redundancies, and time-consuming tasks created a bottleneck in the onboarding process
- The process was convoluted, disorganized, and error-prone, stemming from manual human data transfers
- Suboptimal onboarding experience led to a negative client perception, as the process was prolonged and reflected poorly on the company due to manual errors.

SOLUTION IMPLEMENTED

CENTRALIZED DATA ENTRY:

Establish a centralized data-entry hub enabling the input of all essential information in one place, eliminating the necessity for multiple data entry points across the seven systems.

AUTOMATED UPDATES ACROSS ALL SYSTEMS:

Upon successful entry and validation of data, our automated workflow seamlessly updated all pertinent systems, irrespective of the product combination. Moreover, swift confirmation notifications were promptly dispatched to the relevant Client Success resources, ensuring a seamless onboarding experience.

Stop wasting time & money on inefficient processes.

- Remove Manual Workflows
- Save Time
- Increase Productivity
- Increase Efficiency
- Reduce Errors
- Enable Growth
- Drive Success
- Streamline Processes

No upfront cost or IT needed

Discover how automating your workflows can help you grow your business.

RESULTS

- Resolved all challenges
- Achieved an average reduction of 2.5 hours of manual data entry per client
- Substantially improved the client experience
- Strengthened data accuracy
- Fostered more robust client relationships
- Cultivated trust and confidence among clients and employees
- Paved the way for enhanced collaboration and the establishment of enduring, long-term relationships.