



Deliver on promises, right from the start

Build valuable lifetime relationships with
quick, accurate onboarding.

Onboarding and enrollment are the first impressions someone has of your business. Adding new employees and customers and initiating new business relationships, like applying for a loan or new insurance, should be quick and easy. But for many enterprises, it's a series of complex tasks surrounding data capture and due diligence with lots of handoffs against an ever-changing regulatory landscape. Intelligent automation can help you get the workflow and the relationship right – right from the start.

Slow, cumbersome onboarding costs you time and money

Whether you're onboarding new customers, suppliers, members, or business partners, lengthy processes can result in lost revenue and delayed customer satisfaction. But onboarding is complex and very often highly regulated. It's also people-intensive, meaning errors and variability creep in. These are all barriers to success and scale.

Over 64% percent of banks report lost deals and revenue due to problems in the current onboarding process.

– Forrester Research

A seamless onboarding experience can help establish relationships and minimize churn.

Intelligent automation can help you capture essential data, perform due diligence, activate accounts, manage risk and compliance, and address questions and concerns quickly and accurately – so you can build positive relationships from the very first interaction.

5 steps to great onboarding

Do your homework

Embed good Know Your Customer (KYC) and Know Your Supplier (KYS) processes into your onboarding to ensure you're on the right track right away.

Send a warm welcome

Personalized, proactive communications make people feel appreciated and engaged in the process.

Make the complex seem easy

Create guided workflows that span teams and systems without overwhelming your customers, suppliers, or employees.

Give everyone visibility into the process

Track progress and set alerts to trigger if any task falls behind to help make sure work is happening on time and you're getting the data you need.

Help people be successful quickly

Connect the right people with the right information and processes so everyone hits the ground running. Send new onboards standard documents, links to websites, and all their day-one apps as needed at each stage of their journey.



How intelligent workflows help you onboard better.

Streamline work

Build KYC and KYS business rules into your onboarding workflow to ensure compliance with customer and supplier criteria. Lower risk, foster trust, and increase efficiency and accuracy by using RPA to automate data collection and validation. Utilize built-in AI to predict “breakages” in your onboarding experience and automatically reprioritize, reroute, and escalate work in real time.

Increase compliance

Automate requests for and analysis of data from background checks. Take advantage of intelligent automation capabilities to present the right information to the right people at the right time. Enable all stakeholders to view the status of onboarding milestones and set real-time alerts to notify people if they fall behind.

Improve experiences for everyone

Define all elements of the onboarding and acquisition experience on a single surface where business and IT can collaborate to ensure optimal customer outcomes. Build on a platform that not only lets you get it right initially but supports targeted changes in new layers to specialize workflows, decisions, experiences by region, customer, offer, etc. Let your customer determine their preferred way to engage and deliver a predictable customer onboarding experience regardless of how they connect with you. Make sure all parties are engaged during the process, and use AI-based decisioning to personalize every onboarding experience based on customer context.

Achieve significant ROI in less than 3 months with Pega’s low-code platform

Pega’s low-code platform lets you build production-ready workflows in a fraction of the time versus conventional methods. That’s because Pega integrates seamlessly with your existing business applications so you can add new workflows, specialize workflows by region or line of business, and deliver Pega apps on any channel without having to write specific code for each one. And our patented, layered architecture lets you design and start building for change, so you can easily adapt to new business, regulatory, or even geopolitical circumstances.

“Virgin Money has delivered dramatic operational efficiency and customer experience outcomes with Pega and Accenture. As an example, account opening journeys for one product have been reduced from 15 days to 15 minutes.”

– Keith Williams
Head of Process Automation Service Centre,
Virgin Money



Who's leading the way?

Virgin Money transformed account opening processes and reduced the onboarding journey for one product from 15 days to 15 minutes.

Siemens created a globally aligned digital workflow solution for master data management and decreased onboarding time of new business partners by 65%.

Healthfirst modernized member enrollment, claims, and provider lifecycle management and automated 98% of enrollments.



**Learn more about
how to build valuable
relationships.**

Download the eBook, [“Getting value from intelligent workflows.”](#)

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