

Making a Stepped Change to the Customer Experience

Case Study

Financial Services Organization uses BusinessOptix to standardize its customer onboarding process

A Finance & Risk (F&R) function in a global financial services organization had expanded their product offering through new product development and acquisitions. A consequence of the rapid expansion was no single, standard and consistent process for onboarding clients who were purchasing the range of products the organization offered – this was creating a duplication of work and a poor experience for customers and internal teams.

As part of an initiative to improve the onboarding process and create a single F&R business, the organization wanted to create a standard process that could be rolled out across all product lines. BusinessOptix was used to design a reusable process that capitalized on the best of existing practices while adding complementary new and efficient ways of working. The rollout included a dynamically generated intranet containing a quick reference guide detailing how the process works, and a tool to help users convert the current process - especially from acquired companies - into the new process.

As a result, they have a single and consistent experience for the customer and it is quick and easy to integrate new products and teams throughout the entire organization – resulting in happier customers, faster revenue recognition and employees who are able to work more effectively. The new process is now the standard for integrating, onboarding and rolling out new products under the F&R banner.

About BusinessOptix

At BusinessOptix, we help organizations Control Today, Navigate Tomorrow™ to achieve the next level of customer and operational excellence. Our cloud-based Business Process Transformation suite is used by hundreds of global firms to capture and redefine business operating and process models, accelerate transformations across the enterprise, improve operational efficiencies and streamline go-to-market processes.

For further information please visit our website, or contact us:

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