



Customer On-boarding Solution Accelerator

Manage your customer information with higher efficiency and quicker turnaround time

Data quality, and the completeness and integrity of customer information can have a clear impact on near-term profitability. Yet, today many businesses are currently using manual, paper-based processes causing duplicate data entry, inefficient processing, lack of management visibility, and disconnected customer service. Anexinet automates your customer on-boarding activities by deploying a repeatable process model that defines common workflows and decision points, which can be customized to meet specific corporate needs.

Solution Outcomes

- Automation of the complete lifecycle for new-account on-boarding from submission to account creation
- Improved client satisfaction
- Transparent status of new-account applications
- Accelerated revenue realization
- Single view of your customers worldwide
- Audit trail of all activities for regulatory compliance

Organizational Benefits

Anexinet's Customer On-boarding Solution enables you to:

- **Increase utilization, productivity, and capacity**
- **Easily access more accurate, up-to-date data**
- **Gain agility to create/change processes for quick deployment**
- **Leverage meaningful performance metrics**
- **Greatly reduce or eliminate processing errors**

Features

Integrated Process Initiation	Processes are automatically started through integration with databases, web services, or document management systems.
Collect/Validate Customer Details	Identity and background information is complete and communicated throughout the process.
Audit	Blacklist checks and risk assessment calculations are automatically completed.
Business Rules	<ul style="list-style-type: none"> • Align business rules within decision-based processes. • Integrate with legacy rules engines.
Approvals	Gain necessary approvals based on thresholds and service-level agreements (SLAs).
Core Systems Integration	Automatically update existing accounting, ERP, and enterprise database systems.
Notifications	Provide automatic notification of progress and process completion.
Reporting	<ul style="list-style-type: none"> • Present management reporting using dashboard and key performance indicators (KPIs). • Integrate with SharePoint and other portals.
Compliance	Provide audit trails on both human and system actions.

Why Anexinet?

Anexinet has become the go-to firm for Metastorm BPM consulting in the Mid-Atlantic region. Our staff of Certified Metastorm BPM Developers has years of experience installing, developing, and deploying customized, integrated business solutions across all major industries including Financial Services, Legal Services, and Life Sciences.