

# Use Case – Leading wealth management firm

## Optimized onboarding, improved client experience.

*“The inefficiency of the earlier process delayed client onboarding leading to revenue loss as well as higher administrative expenses. With OPL, we are able to provide a better client experience while also helping grow our business faster.”*

**- Vice President**

### PROBLEM STATEMENT



Existing onboarding process required clients to review information sent to them by email, print, fill and send back scanned documents.

Inaccurate data capture process.

Manual follow up and lack of completeness.

Legacy systems, lack of connectivity.

### OUR SOLUTION



#### Digitization of client on-boarding process

Optimized customer onboarding.

Smart documents created for gathering information.

Digitized the KYC process.

Enhanced tracking of information to enable a higher layer of compliance.

Leveraged SaaS platform to enable client access at any time from any device.

### OUTCOME & BENEFITS



**Reduction in time to onboard clients.**

**Lower administrative costs.**

**Enhanced customer experience.**

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