

BankApp for Origination & Onboarding

Maximize the value of each customer interaction



Improve the customer experience with Deloitte's BankApp for Origination and Onboarding that is designed to drive revenue at the point of sale, and streamline the business process for originating new accounts and onboarding customers. Traditionally, these processes have involved a multitude of systems that reduce efficiency and limit access to customer information. BankApp for Origination and Onboarding leverages the Salesforce platform and Deloitte's Financial Services industry experience to facilitate highly efficient processes for new customer and new account origination as well as customer relationship development.

Improve the Customer Experience

Open an account in as few as ten minutes and improve the customer conversation

Streamline the process, and have more effective customer conversations by taking advantage of intuitive salesforce.com workflows with sales and marketing questions logically embedded. Flows can be tailored to specific processes and requirements.

Originate multiple banking products in one system without re-keying customer information

Give bankers a single point of entry to originate multiple accounts and execute cross-sell/up-sell activities.

Position bankers as financial professionals who can make recommendations based on the client's financial picture

Increase the number of products and services sold at account opening by serving up intelligent cross-sell offers based on in-house, external and customer provided information.

Promote a "one bank" approach by viewing the full customer relationship and systematically referring clients to business partners

Easily refer clients to internal and external business partners, monitor activity, and track results to provide a fluid and consistent transition experience for clients.

Manage and grow the relationship overtime

Automate new account on-boarding, systematically manage opportunities that were identified at the point-of-sale, and create future reminders and tasks for milestones and maturing products.

Experience High-Quality Operational Execution

Improve compliance adherence and reduce the number of back office touches

Plug into extensive automation and integration to eliminate unnecessary steps and human error. Enforce the latest regulatory requirements with built-in controls, dynamic KYC and other compliance capabilities.

Leverage salesforce.com - a leading CRM solution to improve the bottom line

Produce tangible business results that increase revenue and reduce operating costs. Deploy BankApp much faster, and at a reduced cost than traditional offerings. Plus, customize your Deloitte delivery model to align with your bank's overall strategy.

Manage the adherence of sales processes and measure results using real-time data

Implement automated sales process management with an integrated end-to-end sales management solution on one platform with a full reporting suite.



To connect with Deloitte's salesforce.com practice and to learn more about the Deloitte Origination & Onboarding offering, please contact:

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