

Commercial OnBoarding™ Enrollment

Simplify Corporate Customer Onboarding to Improve Service and Efficiency



Commercial OnBoarding Enrollment from Fiserv enables faster revenue recognition and saves time, money and manpower while improving customer service and loyalty.

The Onboarding Challenge

The complexity of treasury and cash management products continues to grow, creating the need for more streamlined onboarding processes. Manual, paper-based tasks are slow, may need to be repeated by multiple departments, and delay revenue generation. These inefficiencies can disappoint corporate customers that want a fast and complete experience that is consistent across products. They do not want to provide documents multiple times or deal with a myriad of personnel to handle their transactions.

As the financial industry has experienced increased regulation, auditors and examiners are requiring repeatable and fully documented customer onboarding and product setup processes. All tasks need to be tracked and reported, with consistent approval methodology.

Commercial OnBoarding Enrollment automates the commercial onboarding process, saving your organization time, money and manpower while streamlining and improving the customer experience.

Streamlining product setup speeds the realization of revenue from new product implementations and enables superior service.

Simplified Enrollment Through Automation

Commercial OnBoarding Enrollment replaces paper-based forms with electronic forms for customer profiling and product setup. A flexible, automated workflow moves documents between all personnel touch points including sales, operations, management and commercial customers. It provides collaboration mechanisms and accessibility options so that various functional areas of the bank can perform their specific tasks quickly.

Enrollment processes are further streamlined and accelerated in the following ways:

- Duplicate efforts, such as rekeying customer profile data, are eliminated
- Signing up for new products can be done electronically
- Data validation and auto-population improve accuracy and productivity
- Tasks and correspondence are automatically routed
- Dashboards and reports keep you informed of work in progress and work completed

The result of automating the enrollment process? Significant revenue growth and potential cost savings reaching up to millions of dollars a year.



Fiserv is driving innovation in Payments, Processing Services, Risk & Compliance, Customer & Channel Management and Insights & Optimization, and leading the transformation of financial services technology to help our clients change the way financial services are delivered. Visit www.fiserv.com for a look at what's next now.



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Improved Accuracy and Transparency

Increased regulatory requirements have increased the demand for accurate record keeping and process transparency. By eliminating redundant keying of customer information, Commercial OnBoarding Enrollment improves data accuracy for audit purposes. The system's centralized operator dashboards, delineated by functional area, increase process transparency while comprehensive reporting functionality strengthens your organization's quality and compliance initiatives. Moreover, Commercial OnBoarding Enrollment tracks activity for audit purposes. You determine who has access to the system and what actions individual users can perform.

Improved Customer Satisfaction and Revenue Growth

Commercial OnBoarding Enrollment supports the majority of treasury management products and services so that your organization can consistently deliver a superior onboarding experience to every corporate customer. Whether you deploy it in-house or outsource to Fiserv, the solution can be accessible to any group within your organization, and to your clients, via your Web portal. Client-specific requirements can be met with ease, creating a competitive advantage and enabling you to grow your business more quickly. And through mobile access to the application, customer forms and signatures can be processed on demand from any location.

Key Features

- Input and capture of required content, including Master Agreements, signature cards and credit authorizations
- Access from mobile devices for anytime, anywhere processing

Key Benefits

- Elimination of redundant manual processing; Reduced risk of errors
 - Improved revenue growth
 - Greater transparency within treasury operations
 - Reduced audit exposure
 - Improved customer acquisition and retention
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- Automated workflow between departments
 - Electronic forms replace paper documents
 - Records management in accordance with regulatory guidelines
 - Escalation based on defined rules to pertinent parties
 - Automated delivery and output of content and associated data
 - Automated setup of services in legacy applications
 - Streamlined creation of welcome packets and agreements
 - Integration with Fiserv and third-party treasury management solutions, and line of business applications (such as email, sales management and core systems)
 - Access from mobile devices for anytime, anywhere processing using line of business applications (such as email, sales management and core systems)

Connect With Us

For more information about Commercial OnBoarding Enrollment, call 800-872-7882, email getsolutions@fiserv.com or visit www.fiserv.com.