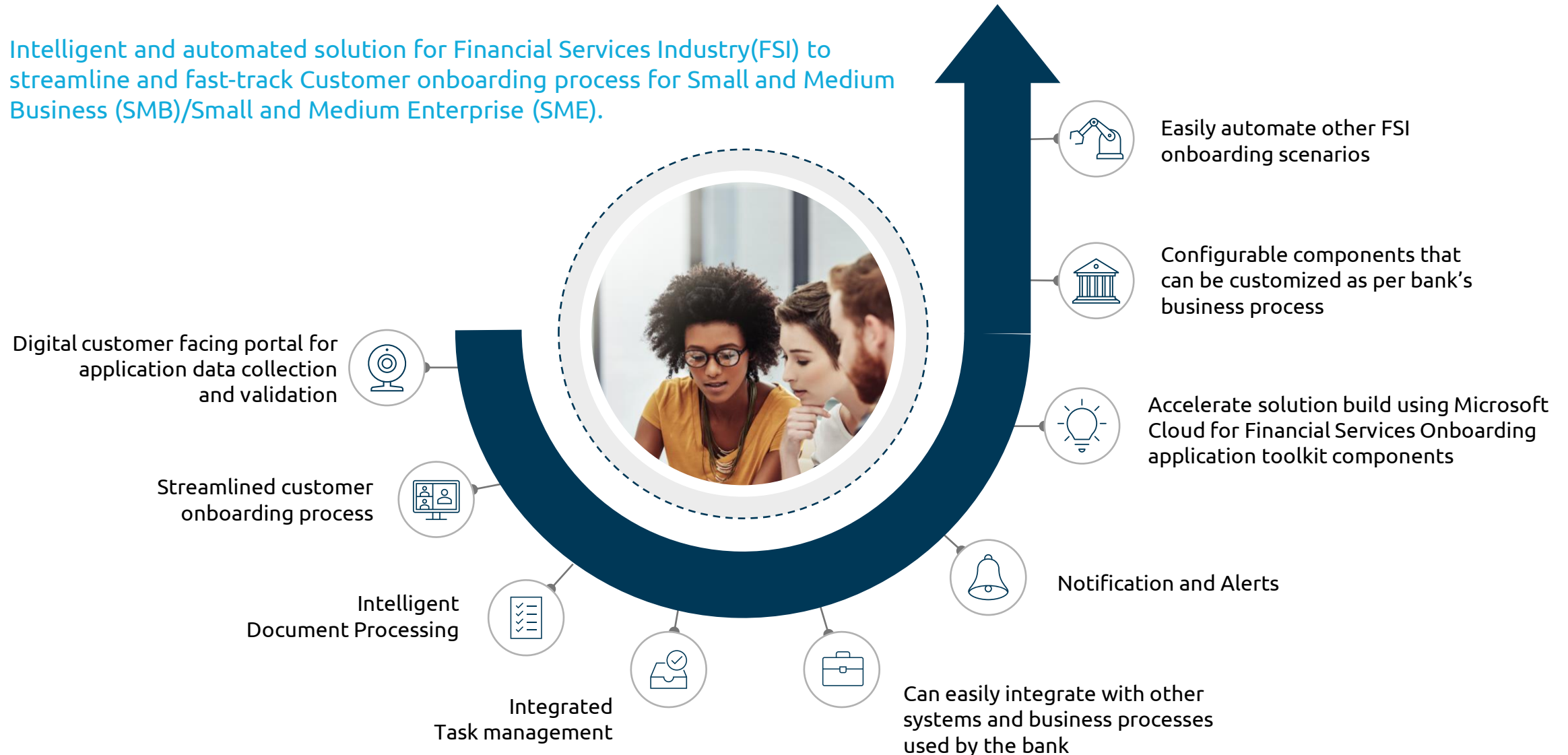# SMB CUSTOMER ONBOARDING ACCELERATOR

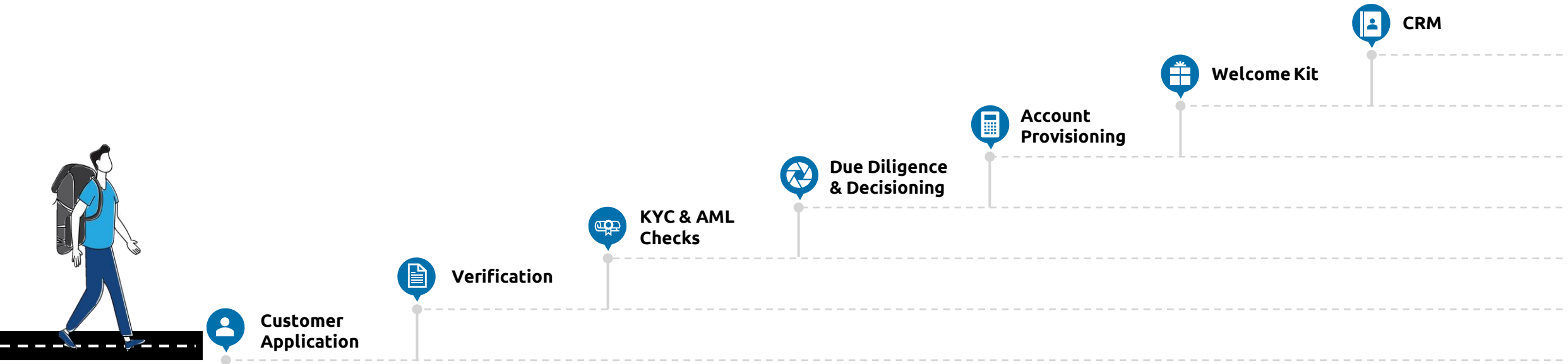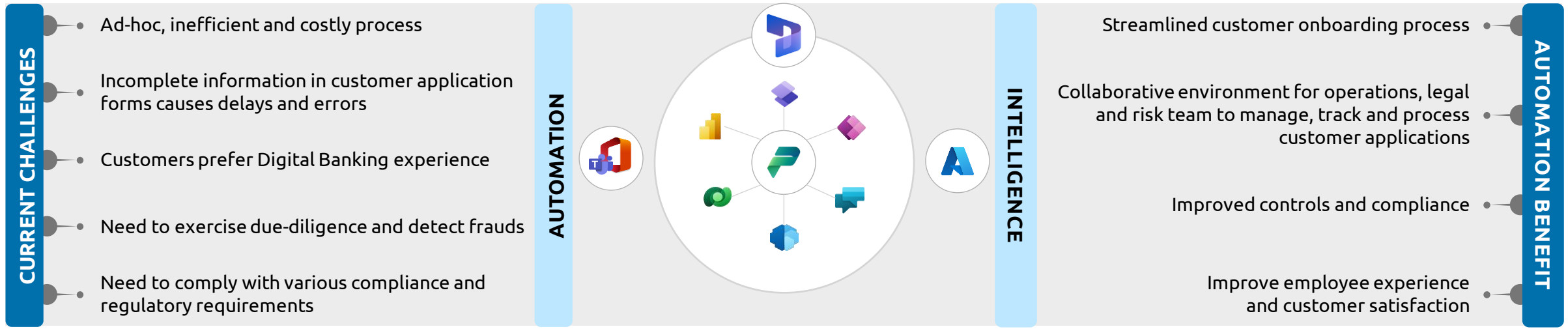Improve customer experience, reduce risks & drive growth for FSI

SMB CUSTOMER ONBOARDING ACCELERATOR FOR FSI

Intelligent and automated solution for Financial Services Industry(FSI) to streamline and fast-track Customer onboarding process for Small and Medium Business (SMB)/Small and Medium Enterprise (SME).

Easily automate other FSI onboarding scenarios

Configurable components that can be customized as per bank's business process

Digital customer facing portal for application data collection and validation

Accelerate solution build using Microsoft Cloud for Financial Services Onboarding application toolkit components

Streamlined customer onboarding process

Notification and Alerts

Intelligent Document Processing

Integrated Task management

Can easily integrate with other systems and business processes used by the bank

END TO END AUTOMATION OF SMB CUSTOMER ONBOARDING

CURRENT CHALLENGES

- Ad-hoc, inefficient and costly process
- Incomplete information in customer application forms causes delays and errors
- Customers prefer Digital Banking experience
- Need to exercise due-diligence and detect frauds
- Need to comply with various compliance and regulatory requirements

AUTOMATION

INTELLIGENCE

AUTOMATION BENEFIT

- Streamlined customer onboarding process
- Collaborative environment for operations, legal and risk team to manage, track and process customer applications
- Improved controls and compliance
- Improve employee experience and customer satisfaction

- Customer Application
- Verification
- KYC & AML Checks
- Due Diligence & Decisioning
- Account Provisioning
- Welcome Kit
- CRM

CUSTOMER PORTAL

Digital customer facing portal enabling new and potential customers to complete online application and submit required application data and documents.

Digital Customer Experience

System checks ensuring completeness and accuracy of application.

Alerts, Notifications and Status tracking for customers.

Dhanam Bank Limited ☰

| 1-Business Type | 2-Business Details | 3-Business Address | 4-Primary Contact | 5-Request Details |

Legal Business Name *

Business Type

Business Structure

Next

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UNIFIED AGENT EXPERIENCE

Streamlined and standardized Business Process Flow improving agent efficiency and productivity.

Unified Onboarding agent experience to manage, track and process pending applications

Simplified data, documents and task management.

Improve employee experience, reduce time and costs for onboarding new customers.
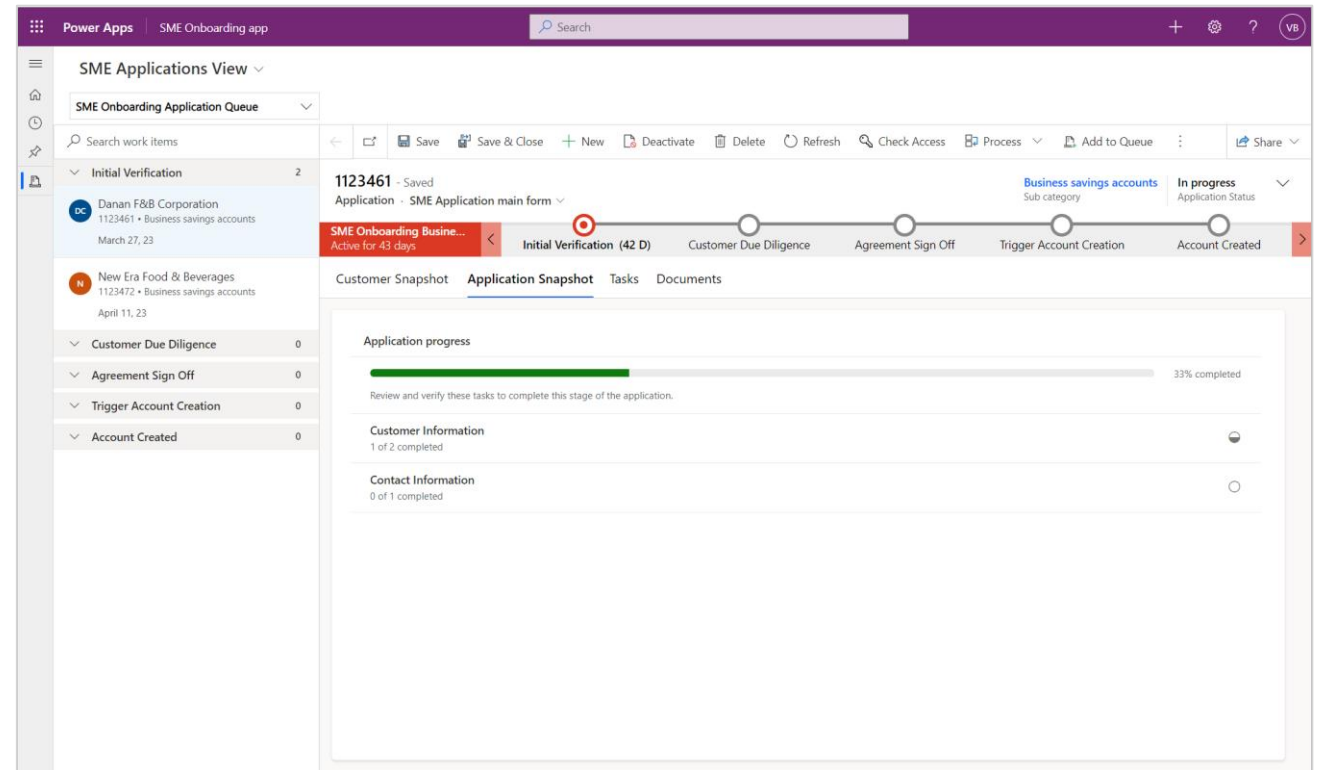
6-WEEK RAPID PROTOTYPING ENGAGEMENT MODEL

01

ENVISION– 1 WEEK

- Identify and Engage with key business stakeholders
- Art of the Possible sessions – Educate, Ideate and brainstorm
- Understand business challenges and identify suitable onboarding use cases that need to be automated
- Prioritization of scenarios and next steps built into a plan
- Define scope and success criteria for MVP

02

DESIGN & IMPLEMENT – 4 WEEKS

- Setup Power Platform environment and deploy Microsoft toolkit solution components in your tenant
- Augment with relevant Capgemini Customer Onboarding Accelerators
- Groom Minimum Viable product (MVP) Use Case
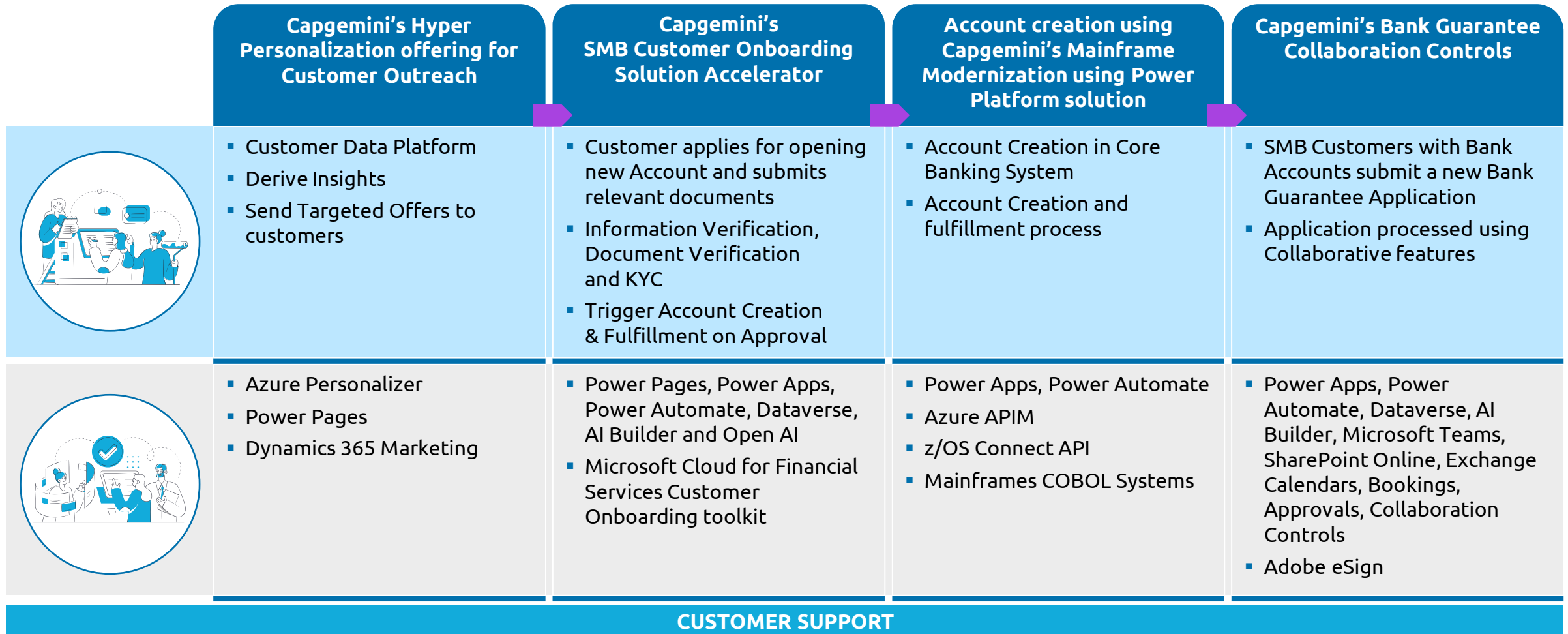- Implement Minimum Viable product (MVP)

03

FEEDBACK & BACKLOG CREATION – 1 WEEK

- Demonstrate business value of Microsoft Industry Cloud Solutions
- Seek feedback from key stakeholders on the MVP
- Create roadmap/epics for future enhancements, integrations with your system of records and org-wide rollout
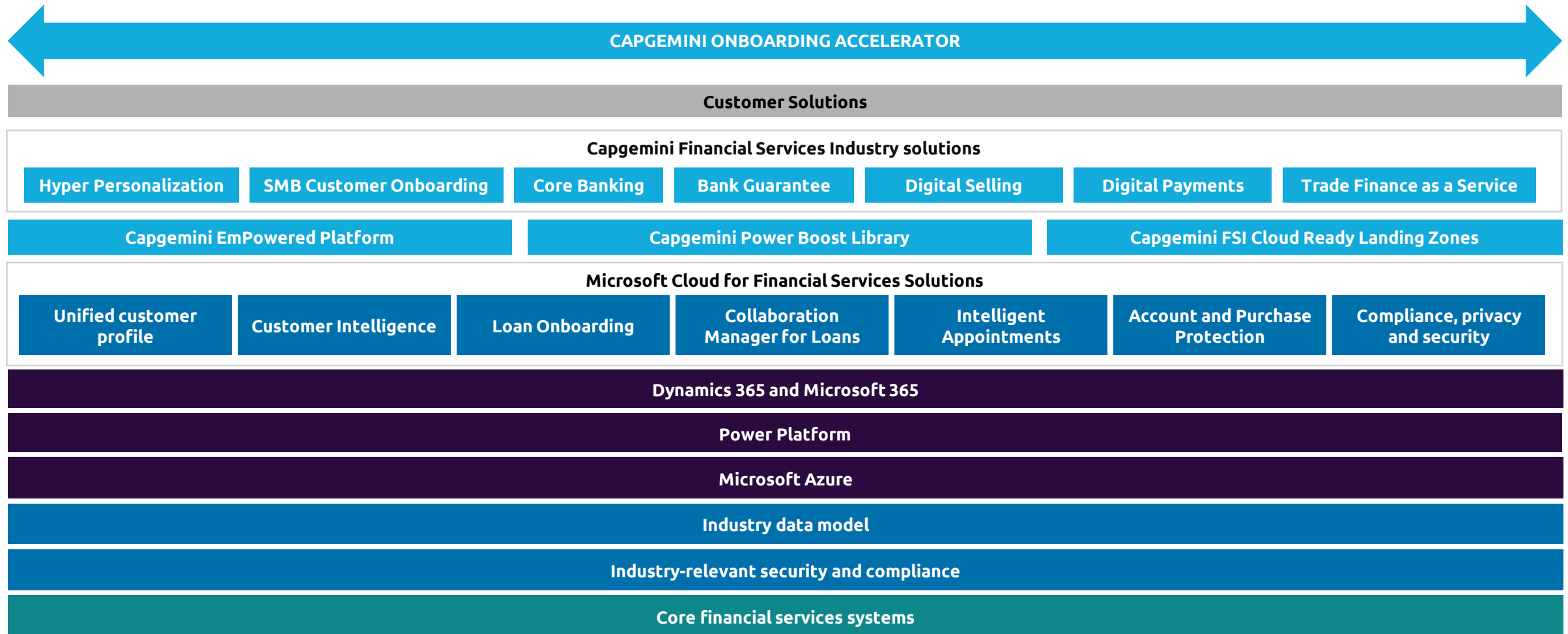- Conclude with Report and Recommendations for next steps and action items

OUR SUITE OF COMPLEMENTARY BUSINESS APPS SOLUTIONS

Capgemini's Hyper Personalization offering for Customer Outreach	Capgemini's SMB Customer Onboarding Solution Accelerator	Account creation using Capgemini's Mainframe Modernization using Power Platform solution	Capgemini's Bank Guarantee Collaboration Controls
- Customer Data Platform - Derive Insights - Send Targeted Offers to customers	- Customer applies for opening new Account and submits relevant documents - Information Verification, Document Verification and KYC - Trigger Account Creation & Fulfillment on Approval	- Account Creation in Core Banking System - Account Creation and fulfillment process	- SMB Customers with Bank Accounts submit a new Bank Guarantee Application - Application processed using Collaborative features
- Azure Personalizer - Power Pages - Dynamics 365 Marketing	- Power Pages, Power Apps, Power Automate, Dataverse, AI Builder and Open AI - Microsoft Cloud for Financial Services Customer Onboarding toolkit	- Power Apps, Power Automate - Azure APIM - z/OS Connect API - Mainframes COBOL Systems	- Power Apps, Power Automate, Dataverse, AI Builder, Microsoft Teams, SharePoint Online, Exchange Calendars, Bookings, Approvals, Collaboration Controls - Adobe eSign

CUSTOMER SUPPORT

- Microsoft Cloud for Financial Services - Unified Customer Profile (UCP)
- Microsoft Digital Contact Center Platform (DCCP), Nuance

HOW THE SOLUTIONS COME TOGETHER

← CAPGEMINI ONBOARDING ACCELERATOR →

Customer Solutions

Capgemini Financial Services Industry solutions

Hyper Personalization	SMB Customer Onboarding	Core Banking	Bank Guarantee	Digital Selling	Digital Payments	Trade Finance as a Service

Capgemini EmPowered Platform	Capgemini Power Boost Library	Capgemini FSI Cloud Ready Landing Zones

Microsoft Cloud for Financial Services Solutions

Unified customer profile	Customer Intelligence	Loan Onboarding	Collaboration Manager for Loans	Intelligent Appointments	Account and Purchase Protection	Compliance, privacy and security

Dynamics 365 and Microsoft 365

Power Platform

Microsoft Azure

Industry data model

Industry-relevant security and compliance

Core financial services systems

■ Capgemini	■ Customer priority solutions	■ Microsoft Cloud for Financial Services Capabilities	■ Microsoft core technology	■ Third party

About Capgemini

Capgemini is a global leader in partnering with companies to transform and manage their business by harnessing the power of technology. The Group is guided everyday by its purpose of unleashing human energy through technology for an inclusive and sustainable future. It is a responsible and diverse organization of 360,000 team members in more than 50 countries. With its strong 55-year heritage and deep industry expertise, Capgemini is trusted by its clients to address the entire breadth of their business needs, from strategy and design to operations, fueled by the fast evolving and innovative world of cloud, data, AI, connectivity, software, digital engineering and platforms. The Group reported in 2022 global revenues of €22 billion.

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