Synechron

Agentic AI in Business and Enterprise

Client Onboarding Use case

January 2026

Why is client onboarding a good **AgenticAI use case**?

First

there is a **business challenge**

From	To
Long onboarding process	Quick turn-around
No insight in progress	Transparent & predictable
No personalization	Personalized & responsive
Manual work in the back office	Increase efficiency through automation

Second

the type of activities are suitable to for **agentic automation**

Using AI

- **Automation**: Can AI execute repetitive tasks?
- **Augmentation**: Can AI enhance human decision-making?
- **Agency**: Can AI operate autonomously with guardrails?

Client Onboarding Accelerator

Goals are both business, functional and technical oriented

Accelerator goals

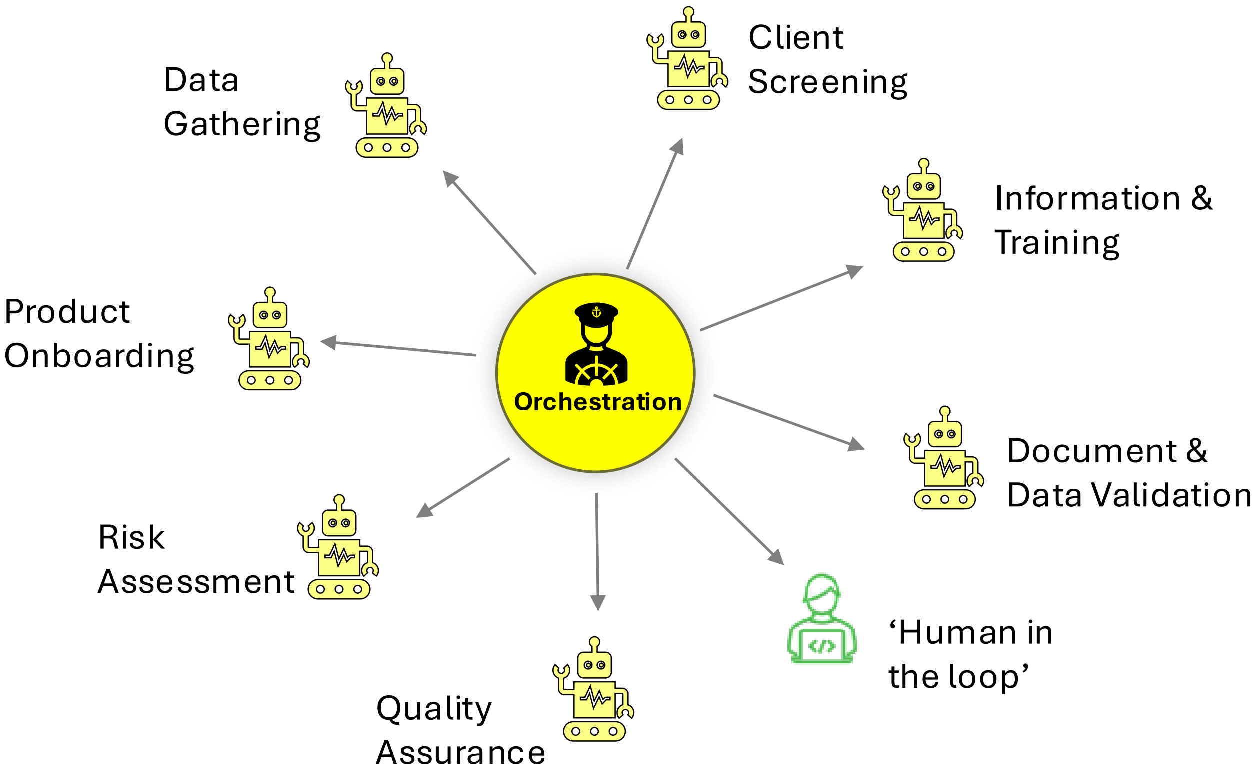
Create a **flexible, personalized customer journey** - executing multi-step, context-aware workflows that require separate systems and human judgment

Explore **advanced fit-for-purpose** AI technologies (GenAI, AgenticAI)

Explore usage of **AI development tooling** (e.g. Devin, Claude Code). Assessment of useability, impact on development timelines, quality etc.

Functional Scope Client Onboarding Accelerator

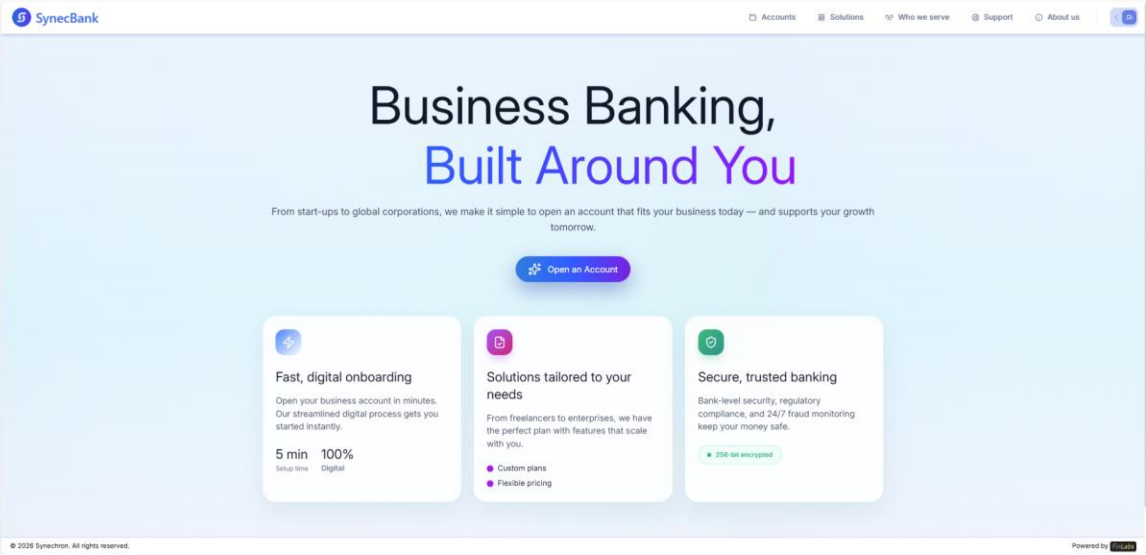
Coordinating central agent determines what journey is most fitting based on client profile

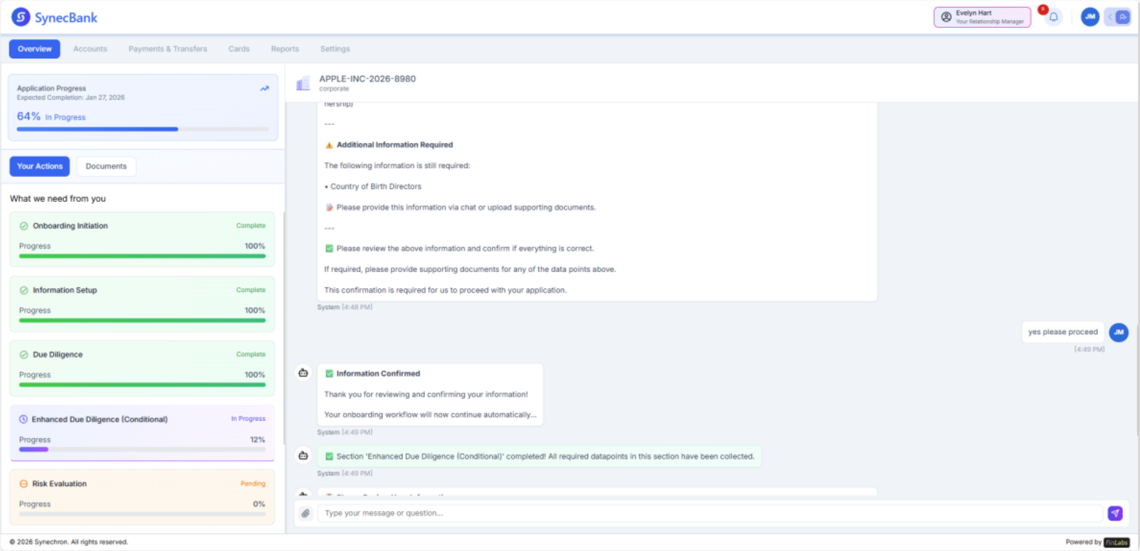


- **Data gathering:** Connect to an external data source to gather data early in the process (tbd which one)
- **Client screening:** Screen client details against OFAC list
- **Document & data validation:** Validate selected documents shared by client
- **Risk assessment:** Data -riven real-time risk assessment
- **Provide Information & Training**: Educate client on banks offering and possible match to meet needs
- **Product Onboarding:** Facilitate 2-3 product the be activated (e.g current Account, lending, FX)
- **Quality Assurance:** Ensure results from the various agents meet quality standards
- **Orchestration:** Orchestration of the various activities (agents) and human in the loop

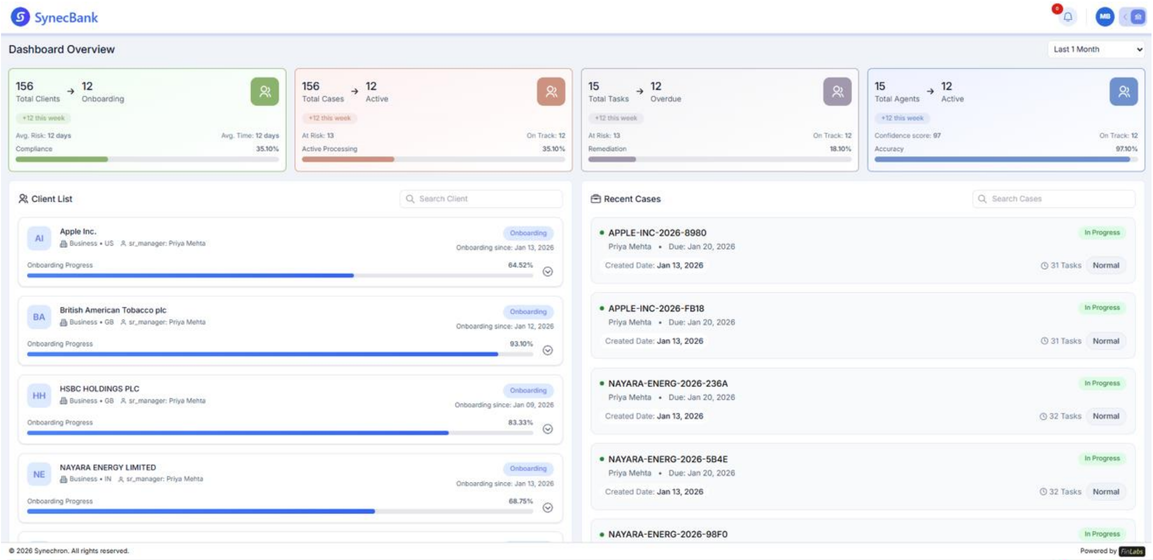
The accelerator has a **client** and **bank** portal

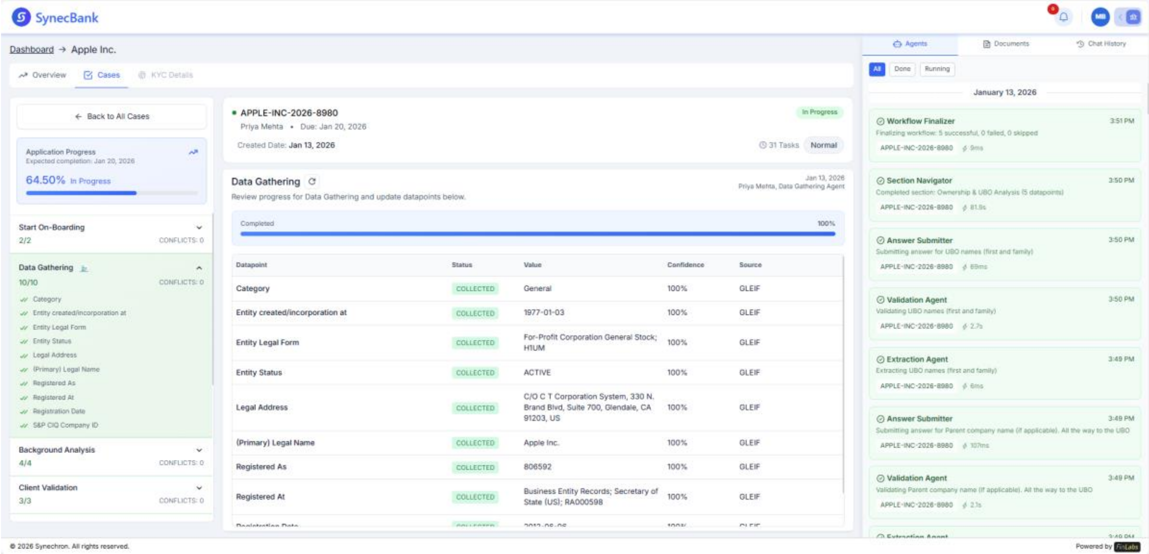
Client





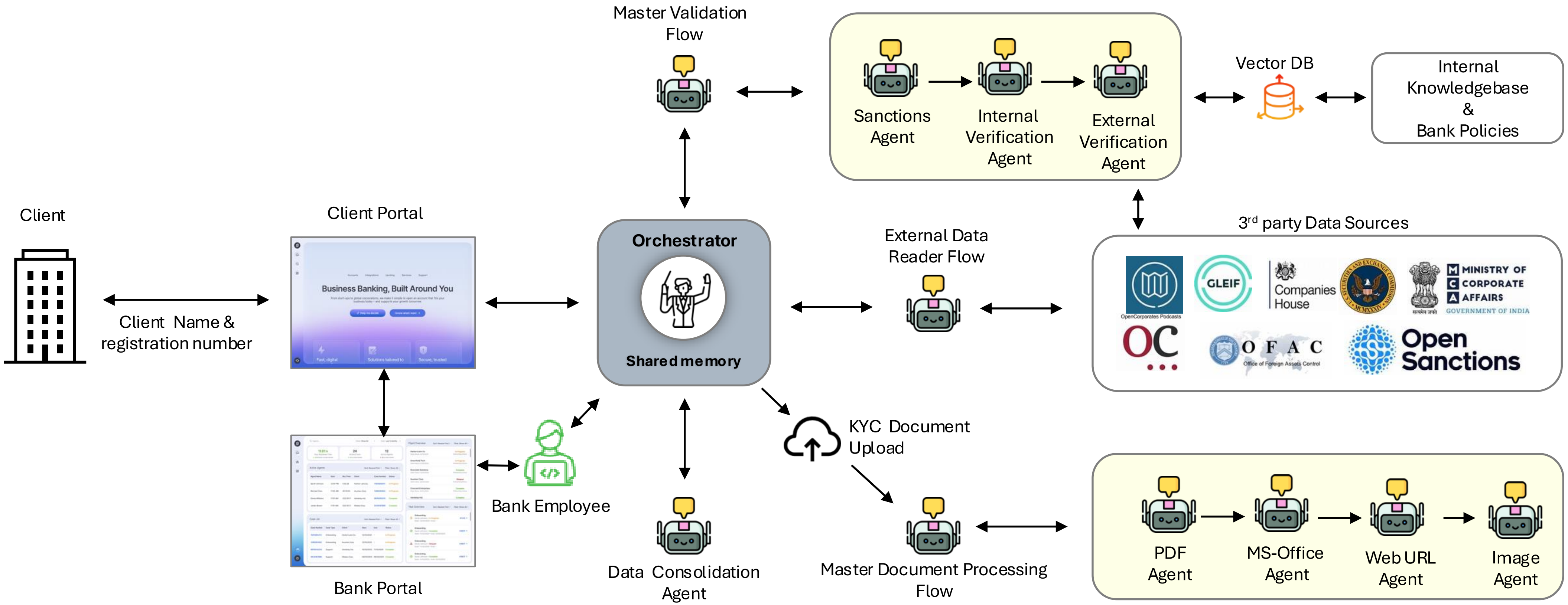
Bank





High Level Functionality

No coding will be used for development of agents



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Target Audience - **Business**

Head of Client Onboarding / KYC Operations	**Primary pain owner** - Directly responsible for turnaround times, operational costs, and customer satisfaction. Has budget authority and urgent need to demonstrate improvement.
Chief Operating Officer (COO)	**Strategic sponsor** - Owns cost-to-serve and operational efficiency. Can mandate cross-functional adoption and controls transformation budgets.
Chief Compliance Officer (CCO) / Head of Compliance	**Risk gatekeeper** - Must approve any changes to onboarding processes. Concerned with regulatory compliance, audit trails, and AI explainability.
Head of Commercial / Business Banking	**Revenue champion** - Frustrated by lost deals due to slow onboarding. Can articulate business case in terms of customer acquisition and retention.

Head of Client Lifecycle Management	**Process owner** - Responsible for end-to-end client journey. Understands pain points across the entire workflow and system integration challenges.
Chief Customer Officer / Head of Customer Experience	**Experience advocate** - Measured on NPS and customer satisfaction. Can champion solution from customer-centric perspective.
Head of Business Transformation	**Change enabler** - Owns transformation portfolio and prioritizes initiatives. Often holds budget for proof-of-concepts and pilots.

Target Audience - **IT**

Chief Technology Officer (CTO)	**Technology strategist** - Sets architectural direction and technology standards. Controls IT budget and decides on strategic technology investments.
Chief Data Officer (CDO)	**Data enabler** - Owns data strategy, governance, and AI/ML initiatives. Responsible for data quality that feeds AI models.
Head of AI/ML or Chief AI Officer	**Innovation driver** - Actively seeking AI use cases to demonstrate business value. Often has innovation budget and mandate to experiment.
Head of Digital Banking Technology	**Platform owner** - Responsible for digital channels and customer-facing systems. Can be champion or blocker depending on integration complexity.
Enterprise Architect	**Technical validator** - Assesses solution fit within existing architecture. Concerned with scalability, security, and integration patterns.
Head of Customer Technology / CRM	**System owner** - Owns customer onboarding systems and CRM platforms. Understands current limitations and integration requirements.
Head of Data Platforms / Data Engineering	**Infrastructure provider** - Owns data pipelines and platforms that feed AI models. Key for production deployment.
IT Program Director - Digital Transformation	**Execution partner** - Manages portfolio of transformation initiatives. Can integrate solution into existing programs.

Thank you

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