

# Expectation vs Reality

CLIENT ONBOARDING IN

# FINANCIAL SERVICES

Delivering a fast-&-friendly customer experience is a top priority for banking & insurance organizations. But what does that mean to your customers? We conducted a survey to find out.

## CUSTOMER EXPECTATIONS

### QUICK & EASY ONLINE SIGN-UP

This matters to your customers. And they're willing to switch to a competitor to get it.

**64%** would switch to a competitor for quick & easy online sign-up.

### PERSONALIZED SERVICE

Your customers want a tailored experience. And they're willing to give up personal data to ensure it.

**61%** are willing to share personal information if it will be used to create a better experience.

### CUSTOMER SERVICE RESPONSIVENESS

Your customers have high expectations around responsiveness. Are you keeping up?

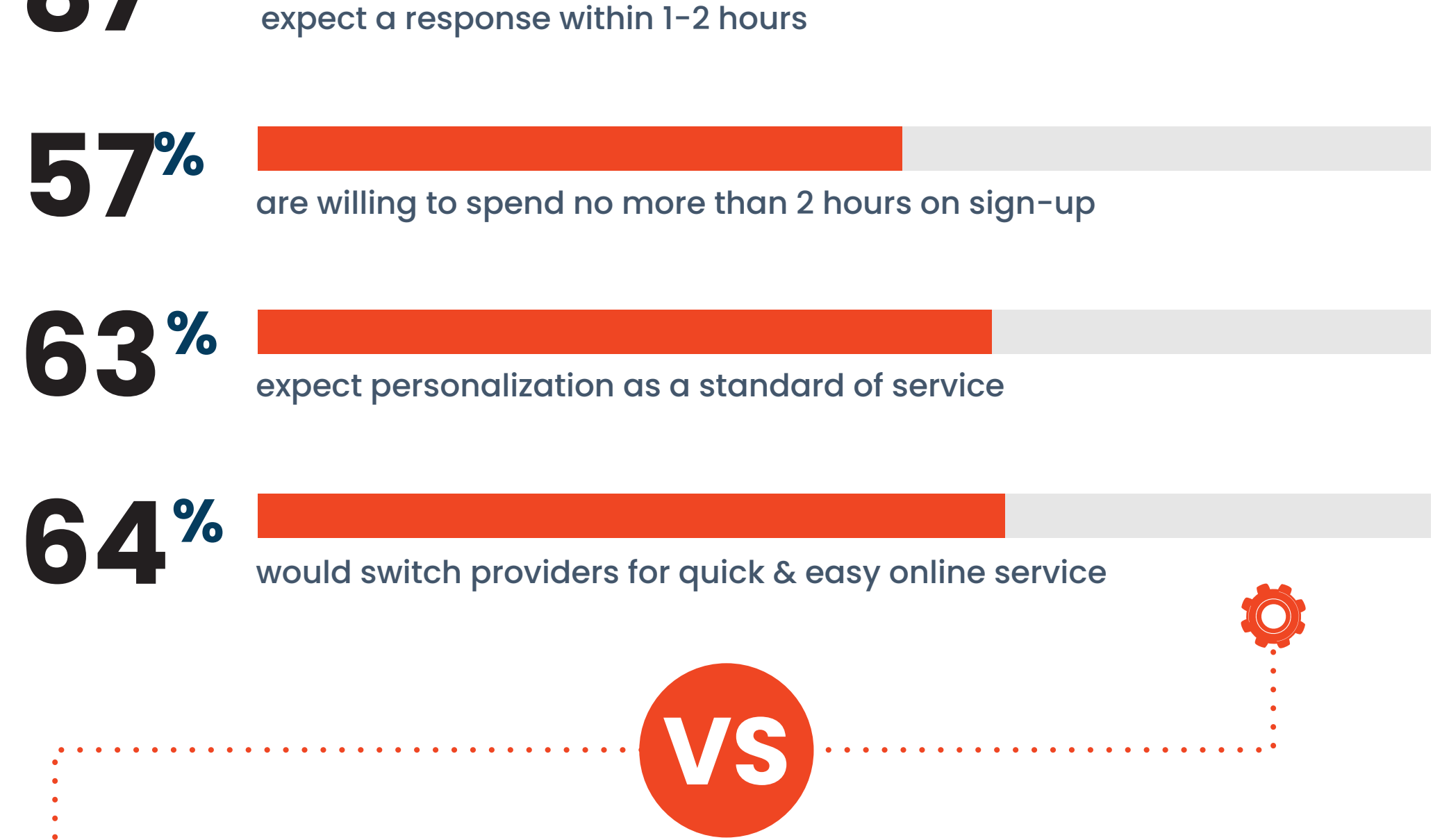
**57%** are willing to spend a maximum of 1-2 hours to sign up for a new service.

**87%** expect their bank or insurance provider to respond to questions in 1 hour or less.

**62%** would switch providers for a response time of minutes to hours vs. days.

## ARE YOU MEETING CUSTOMER EXPECTATIONS?

### Expectation



VS

### REALITY



## WHAT'S getting in the way?



Large volumes of digital & paper-based documents slow internal processes & prevent knowledge workers from quickly & efficiently extracting insights, responding to requests & onboarding clients in a timely manner.



Most data is hidden from technology solutions: Only 25% of data is structured + actionable & 75% of data is "dark."



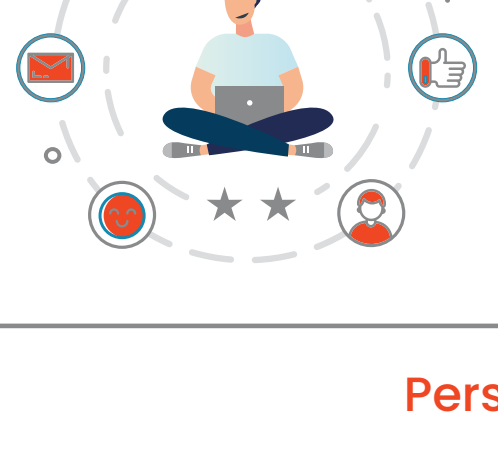
Customer documentation (& sensitive information) is duplicated across fileshares, repositories & departments—clouding decision-making & compromising data security.



Vital customer insights are hidden in unstructured documents (scanned & paper documents, image files, Word documents, etc.).

## MAKE DATA-DRIVEN INSIGHT YOUR NEW REALITY

Leveraging the power of AI, Adlib Insight enables financial services organizations to automate the discovery, classification, and extraction of vital data from complex documents—so you can reduce manual intervention and deliver a "wow!" customer experience from outreach to account open and beyond.

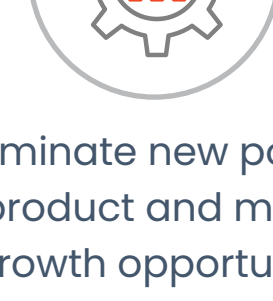


## WOW! Client Onboarding Experience

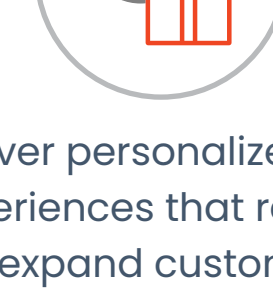
Fast

Personalized

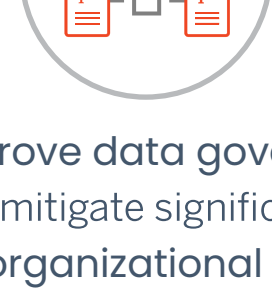
Secure



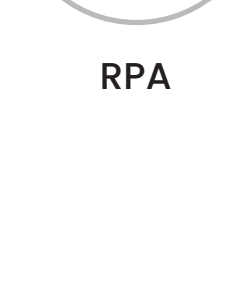
Illuminate new potential product and market growth opportunities



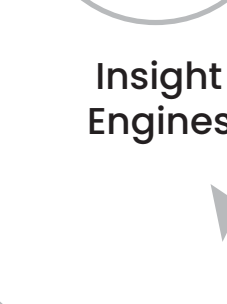
Deliver personalized digital experiences that retain and expand customers



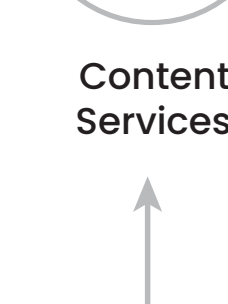
Improve data governance to mitigate significant organizational risk



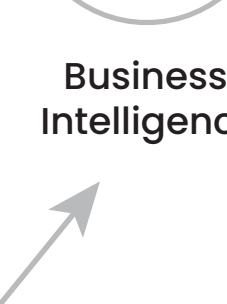
RPA



Insight Engines



Content Services



Business Intelligence



Business Process Management



## Drive End-to-End Automation & Create a Winning Customer Experience

Schedule a demo to learn how Adlib Insight can help you fast-track customer-facing processes and deliver a winning customer experience that wins hard-earned customer loyalty. Click here or call 1.866.991.1704 to schedule a 30-minute hands-on solution overview.

Learn more at [adlibsoftware.com/client-onboarding](https://adlibsoftware.com/client-onboarding)

