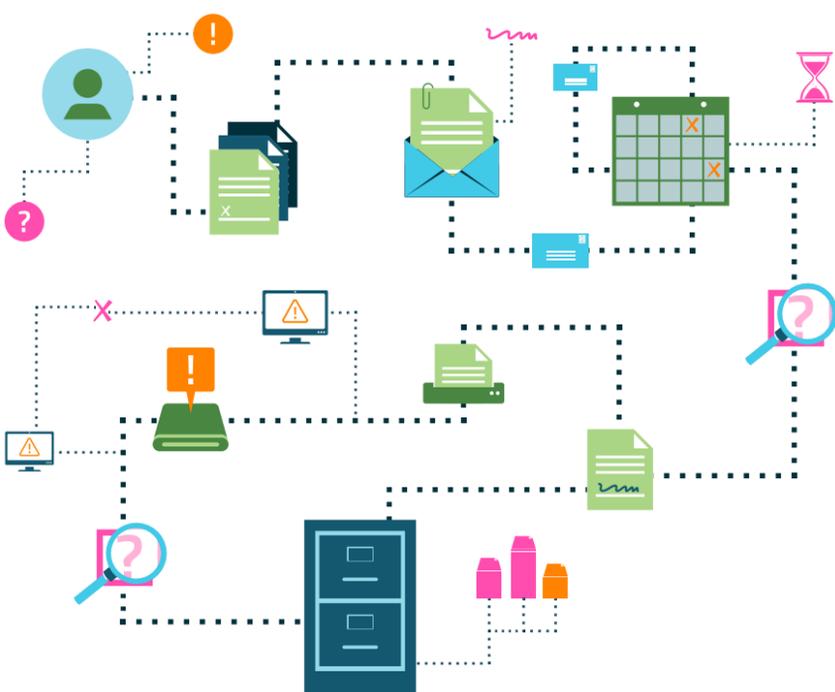# New Client Onboarding

You won a new client. Hooray! Now you have to fill out forms, mail them, wait, and then hope they pass compliance reviews and approvals. Boo!

If you did everything right the first time, you file the forms away in a file cabinet. Or you scan and store them on a network drive, hoping you're complying with SEC and FINRA regulations.

Does this look familiar?

Problems

- Lost contacts
- Missing signatures
- Rekeying data
- Printing and faxing
- Information silos
- Limited capacity

Consequences

- Delays in opening accounts
- Poor client and advisor experiences
- Errors, unsecured data
- Delays and more unsecured data
- Slow processes
- Limited new clients

There has to be a better way, right? Right.

OnBase by Hyland

With OnBase enterprise content management (ECM), which includes powerful workflow software, you can automate and streamline in a way that allows you and your client to never touch a piece of paper. Going further and integrating your ECM solution with your CRM and electronic signatures allows you to securely complete the process in minutes, no matter where your client is located.
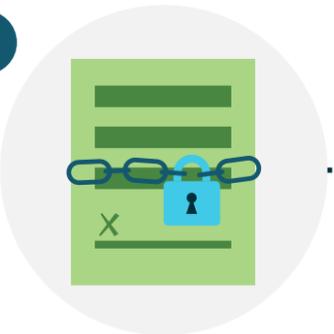
With ECM, you automate the new client onboarding process. Here's what ECM does:
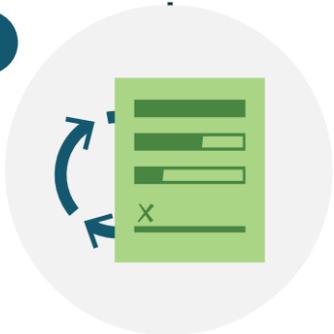
1 Pulls new client information from your CRM and auto-populates the form

2 Securely stores the form

3 Emails the form to the client for a secure, electronic signature

4 Saves the form for compliance review and approval

5 Routes the form for long-term storage in accordance with regulations

6 Tracks every interaction, creating traceable audit trails that document who did what, why and when

With the right ECM solution, your onboarding forms are safe, secure, searchable and available to workers in the field on their smartphones.

Sound like a better way?

Learn more at **OnBase.com/FinancialServices »**

OnBase® by Hyland

One platform **Unlimited potential**