

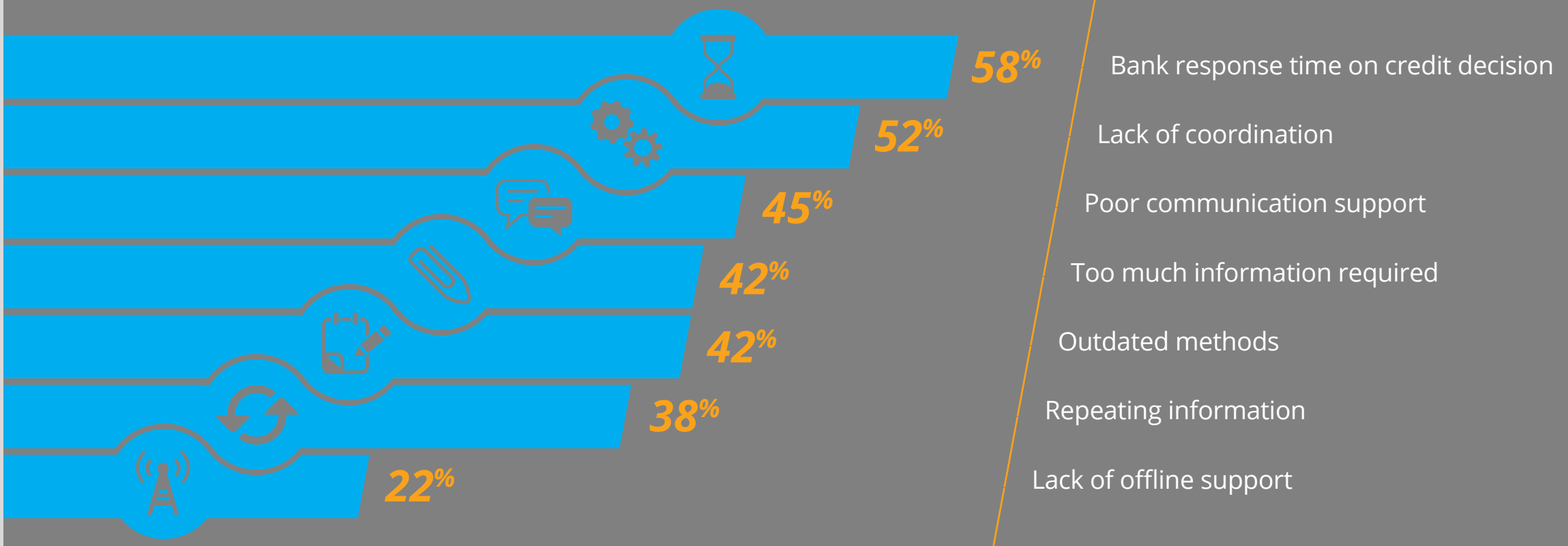
# CORPORATE CLIENT ONBOARDING

## IN THE AGE OF THE CUSTOMER

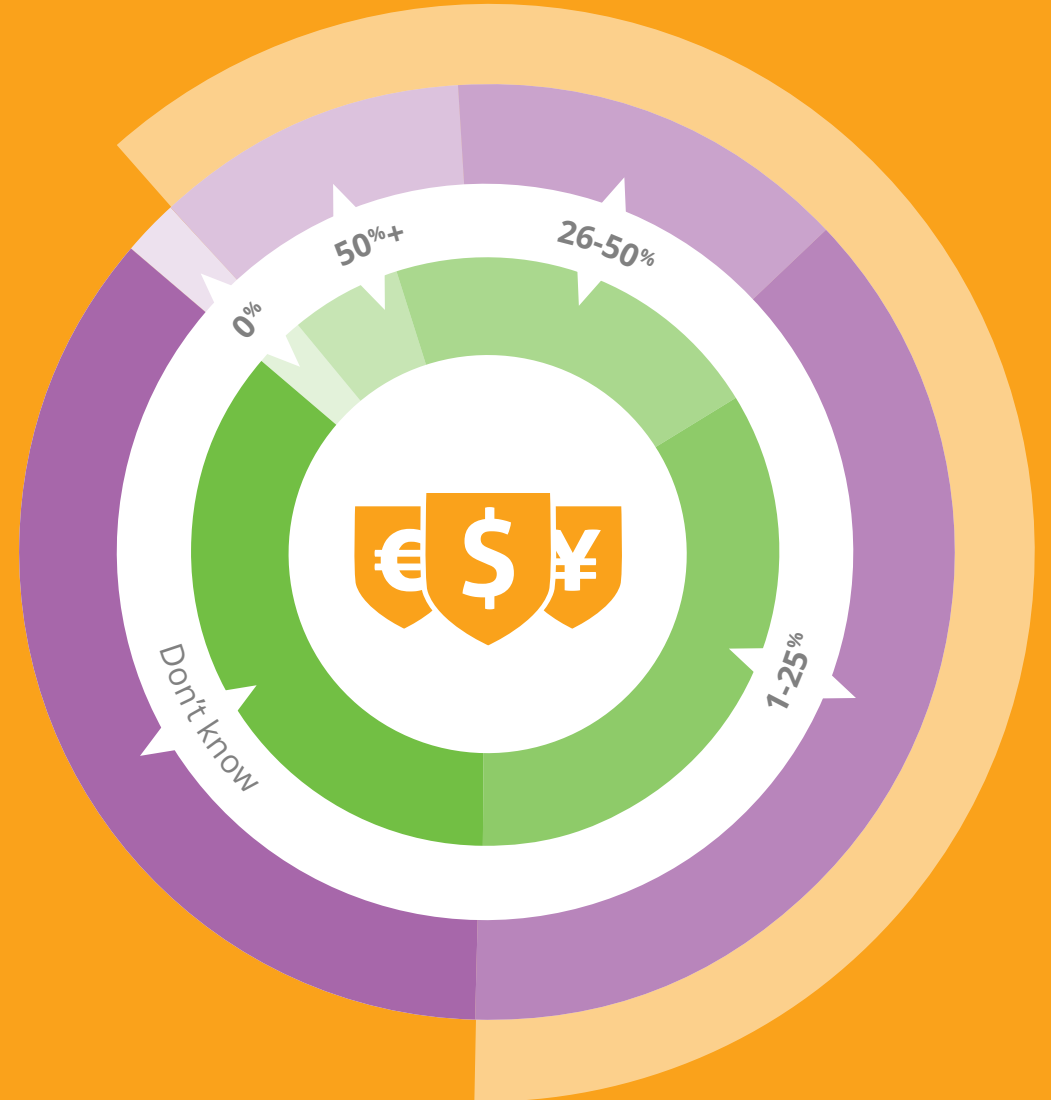


believe the onboarding process impacts lifetime value

The most common reasons why a customer drops out of the onboarding process:

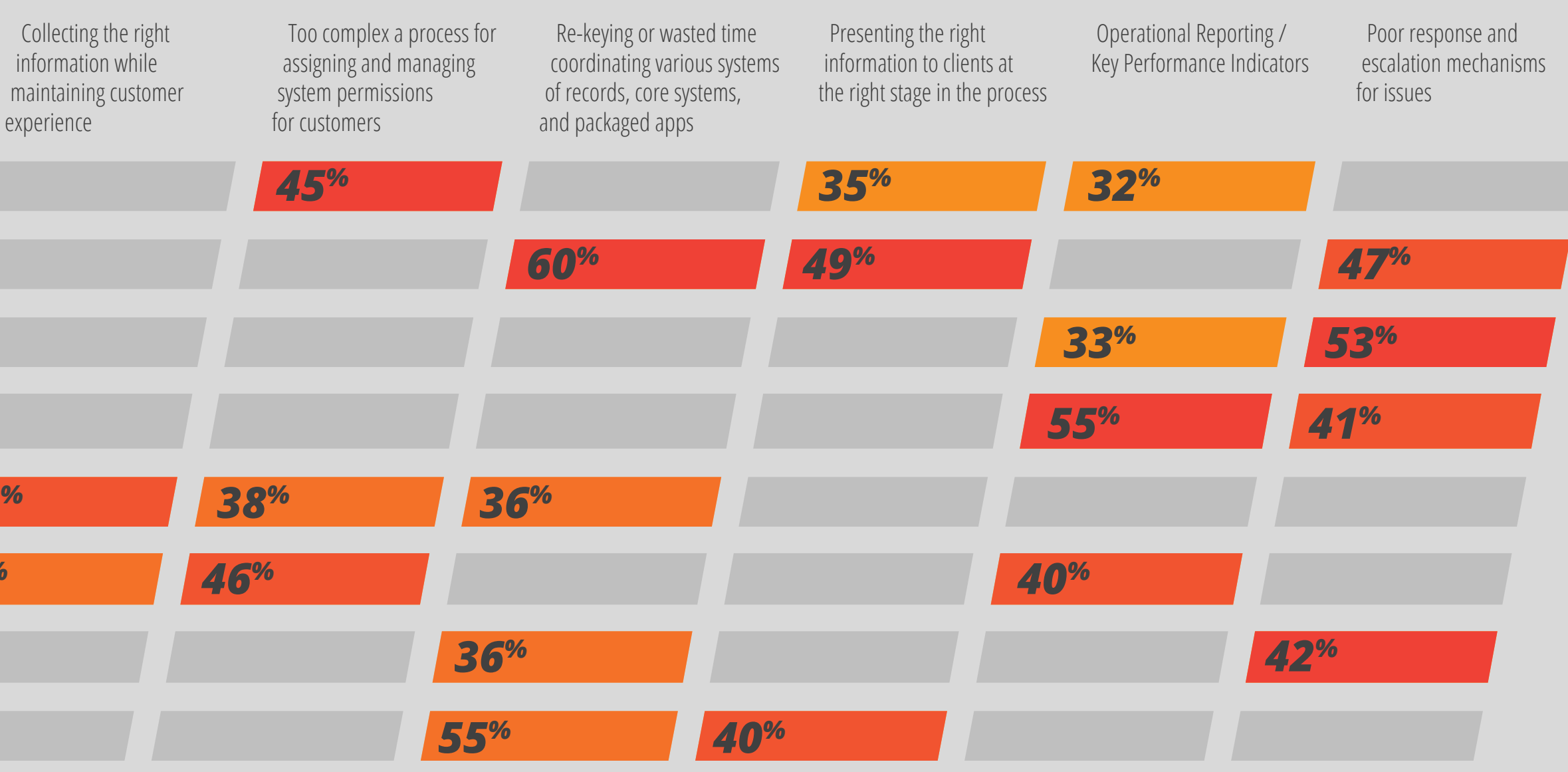


Percentages of **revenue** lost and **deals** lost due to problems in the current onboarding process:



63% believe revenue is lost, and 61% believe deals are lost due to problems in onboarding

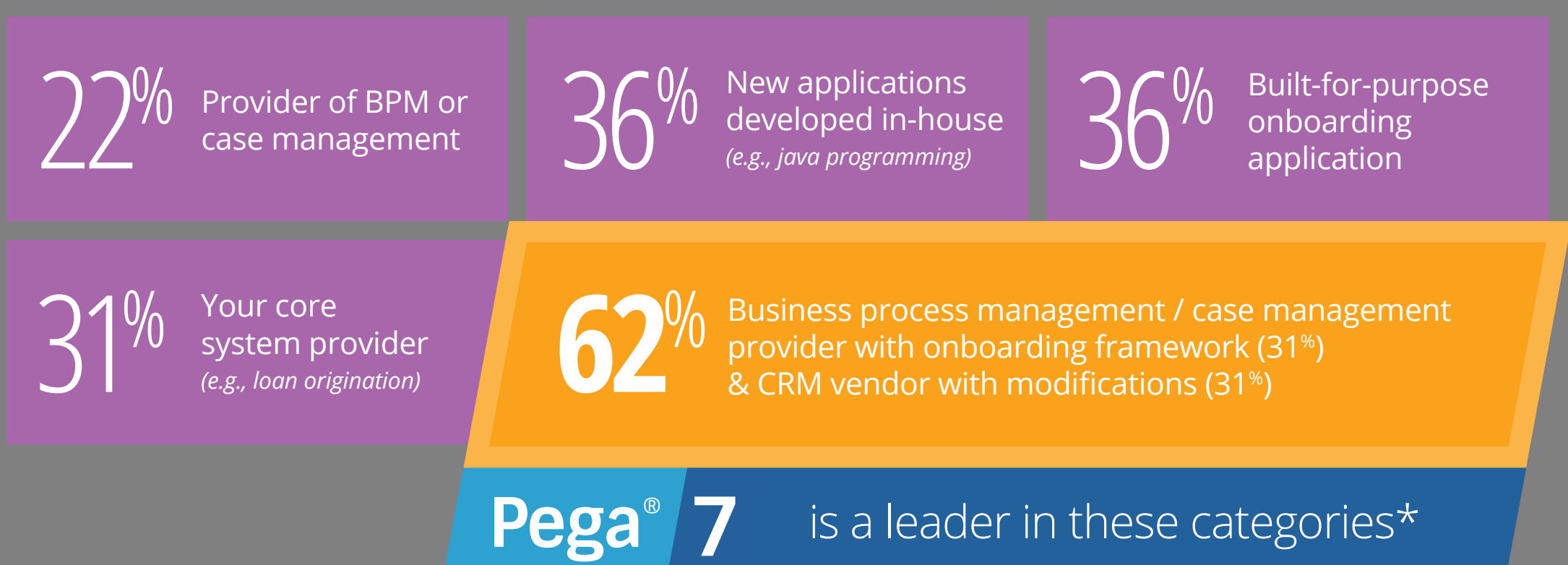
Process problems affect all phases of onboarding:



#### PHASES:

- |  |   |
|--|---|
| 1 Sales engagement handoff             | 5 Credit underwriting / risk sanctioning                        |
| 2 Application data gathering           | 6 Final pricing / sales   |
| 3 Know your customer / due diligence   | 7 Closing and funding of credit                                 |
| 4 Initial deal configuration & pricing | 8 Fulfillment of cash, trade, or investment accounts & services |

Improvements in onboarding functionality will come from:



For more information about Pega in client onboarding or the survey please visit [www.pega.com](http://www.pega.com) or contact [ron.wellman@pega.com](mailto:ron.wellman@pega.com)

\*according to recent studies by Gartner and Forrester Research © 2014 Pegasystems

