

TCG Process:

Streamline Account Opening

Accelerate customer onboarding with digital document processing that reduces time-to-activation while improving data accuracy and customer experience.

Onboarding shouldn't be a barrier to growth. With TCG's Customer Onboarding Automation Accelerator, you can digitize and streamline account opening across every channel. By automating document capture, verification, and compliance checks, you deliver faster activation, higher data accuracy, and a frictionless experience that keeps customers engaged from the very first interaction.



Let the results speak for themselves:

- ✓ **Faster Activation**
Cut onboarding time from weeks to hours with automated document collection and verification.
- ✓ **Lower Abandonment Rates**
Remove friction points and streamline workflows to reduce customer drop-off.
- ✓ **Improved Data Accuracy**
Intelligent parsing and validation ensure information is captured correctly the first time.
- ✓ **Enhanced Customer Experience**
Provide seamless digital onboarding that boosts satisfaction and loyalty from day one.

Transform onboarding into a seamless customer experience. Automated document collection, ID verification, and account setup reduce drop-off, improve data accuracy, and activate new accounts quickly. Your teams spend less time on forms and more time building relationships that last.

Customer Onboarding Challenges We Solve:

Paper-based account opening processes

Replace manual forms and workflows with intuitive digital customer experiences.

High customer abandonment rates

Eliminate friction points that cause prospects to abandon onboarding and choose competitors.

Resource-intensive identity verification

Automate KYC processes and document authentication to reduce operational costs.

Inconsistent data collection

Standardize information gathering across all customer touchpoints and communication channels.



"Onboarding that once took 3–4 weeks now takes under 24 hours. Abandonment dropped from 30% to 5%, satisfaction scores more than doubled, and we've processed 300% more accounts with the same team size. TCG transformed our onboarding from a barrier into a competitive advantage."

Head of Corporate Banking

Major South American Bank

Key Benefits of Automated Customer Onboarding:

1

Increase customer satisfaction scores

Deliver seamless digital onboarding experiences that exceed modern customer expectations.

2

Eliminate manual data entry

Free up staff from repetitive tasks to focus on relationship building and customer service.

3

Improve customer data accuracy

Capture information correctly the first time with intelligent document parsing and validation rules.

4

Reduce onboarding time from weeks to hours

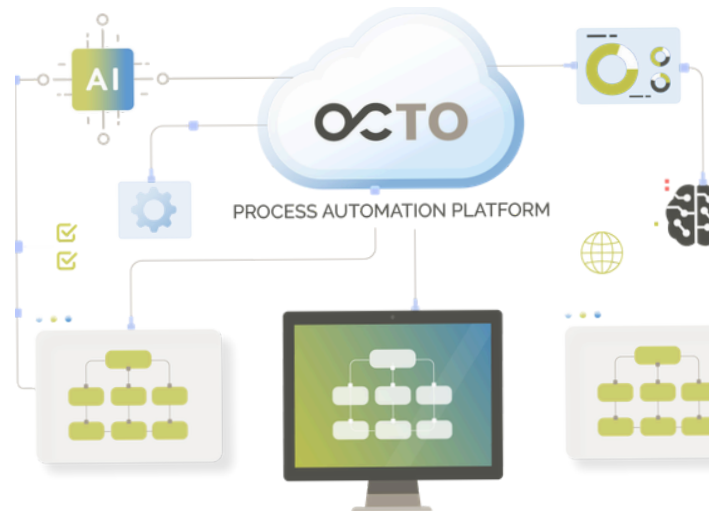
Automate document collection, verification, and account setup processes.

Unmatched Processing with OCTO

Efficient processing starts with precise data. With OCTOidp, intelligent extraction and classification ensure that only accurate data flows into your business processes in OCTO.

Business rules engines ensure consistent onboarding rules across all customer applications, minimizing errors and inconsistencies while reducing processing time.

The entire customer onboarding lifecycle - from document collection to approvals and follow-ups - is orchestrated in a single platform, offering full transparency and control.



Harness AI with OCTOai

Integrating AI into customer onboarding offers numerous benefits - from efficiency gains to attracting more customers and better fulfilling their needs.

OCTOai makes it easy to integrate your choice of AI service(s), while offering out-of-the-box integrations with leading providers including OpenAI, Microsoft and Google.



Reduce
Onboarding Time



Eliminate Manual
Data Entry



Minimize
Lending Risk



Increase Customer
Satisfaction

Schedule a demo or speak with one of our experts to accelerate your onboarding processes.