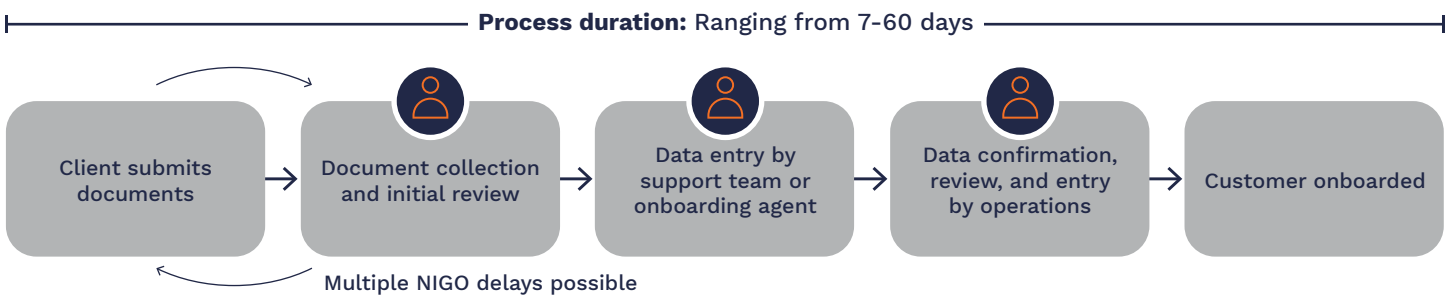ALKYMI

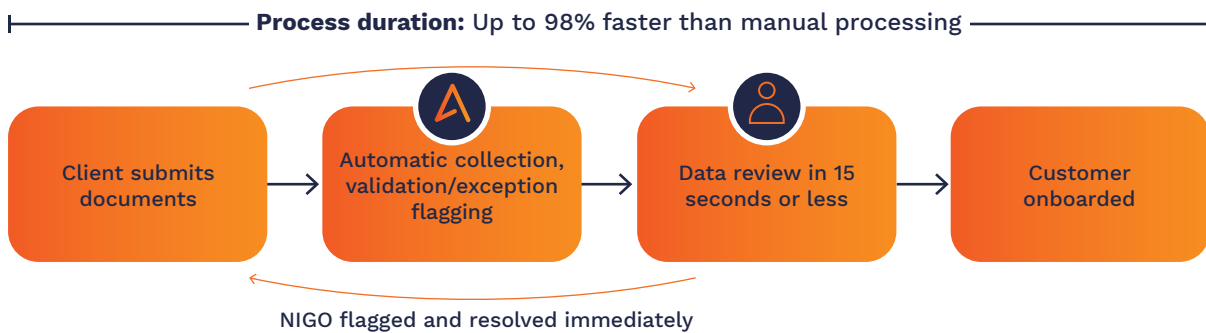# Onboard your customers with more speed and less risk

When onboarding retail and institutional customers, companies must adhere to a long list of business and regulatory requirements to reduce risks and liabilities while ensuring a great customer experience. A critical part of the onboarding process includes the review, verification, and processing of distinct documentation types submitted by customers interested in a specific service offering. The burden of handling this unstructured data falls on your skilled onboarding agents and operations professionals who spend countless hours manually processing the information, following up with clients, and conducting audits. **This time-consuming step can hurt your client relationship and impact your bottom line.**

Typical onboarding process

Process duration: Ranging from 7-60 days

| Client submits documents | Document collection and initial review | Data entry by support team or onboarding agent | Data confirmation, review, and entry by operations | Customer onboarded |

Multiple NIGO delays possible

Alkymi™ can eliminate operational bottlenecks and **accelerate the client onboarding process by up to 98%** by surfacing structured and validated data across multiple document types in a single, easy-to-use tool. With fewer manual steps in the process and an auditable trail to the data source, your team can confidently take immediate action—onboarding more clients while improving customer satisfaction.
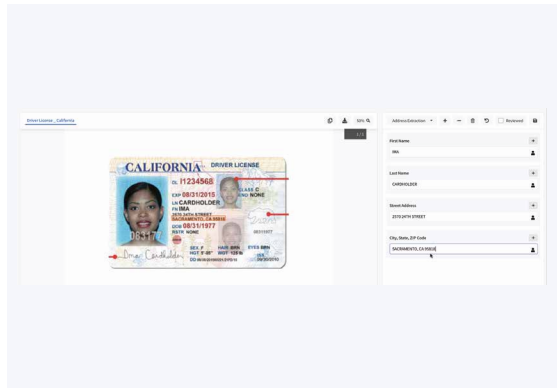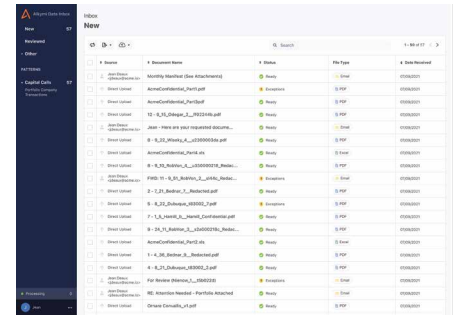
Alkymi account onboarding process

Process duration: Up to 98% faster than manual processing

| Client submits documents | Automatic collection, validation/exception flagging | Data review in 15 seconds or less | Customer onboarded |

NIGO flagged and resolved immediately

By automating your document workflow with Alkymi, you can:

- **Onboard more customers faster using your existing workforce**
- **Reduce abandonment/quit rates**
- **Eliminate unnecessary client outreach and process restarts**

- **Improve customer and employee satisfaction**
- **Reduce business risk and improve compliance**
- **Improve overall process costs**
- **Eliminate data audits and second-step reviews**

Key features

Alkymi Patterns leverages machine learning (ML), natural language processing (NLP), and computer vision to extract and structure targeted data (including handwriting) from 27 file formats while surfacing "not in good order" (NIGO) data for an accelerated exception handling. Alkymi's Data Inbox™ seamless workflow and enterprise integrations accelerate your overall onboarding processes by centralizing your data sources.

Built for users	Accelerate adoption and decision-making with an easy-to-use UI
No-code automation	Build and deploy your own Patterns to automate workflows
Industry-grade compliance	SOC 2 compliant; best-in-class security
Enterprise integrations	Create end-to-end workflows by connecting with out-of-the-box API integrations

Leading customer implement Alkymi to automate document processing and management for:

Account opening/set up	Account rollovers	Portfolio transfers
Customer due diligence (CDD)	Know your customer (KYC)	Advisor onboarding
Claims processing	Asset transfers	

In our business, rollovers are . . . very human-intensive, time-consuming, and sometimes error prone. We're working with Alkymi to automate this process and make it real-time. Users will be able to upload their documents, and Alkymi will process their documents in real-time, allowing the customers to validate their data and submit their documents. And with no human intervention, the rollover process will be complete.

Raja Doddala, Managing Director, TIAA

Visit alkymi.io to schedule a demo today.