Streamline the onboarding of customers or products

Quickly fulfill customer requests end-to-end

It's a universal truth that time is money. Whether you're trying to issue a new credit card, activate a new account, launch a new app, or get a new store up and running, speed matters. The faster you can onboard a customer or product, the faster you can start making money (and the happier your customers will be)! Unfortunately, onboarding processes are often slow and complicated, spanning multiple teams and systems.

The number of steps and users involved can add days, weeks, even months, to the process. Different teams working in different systems can obscure visibility, making it hard to collaborate, track status, and keep the process moving forward. A reliance on manual communications (e.g., emails, calls, and messages) can introduce errors, cause delays, drive up costs, and reduce customer satisfaction.

To enable customers and products to be quickly activated, onboarding processes need to be digitized and automated, from the front to the back office. ServiceNow solutions are purpose-built to help.

Connect teams to achieve end-to-end visibility

ServiceNow's customer service solutions are designed to reduce the time it takes to complete onboarding-related tasks to generate business faster. By connecting people, systems, and workflows on a common platform, ServiceNow automates and streamlines onboarding processes to help reduce errors and get customers and products operational faster. End-to-end visibility enables you to track and communicate status and keep processes moving to accelerate revenue generation and increase customer loyalty. With ServiceNow, you can:

- Collaborate more effectively with a single system that provides easy access and real-time visibility into the status of onboarding tasks.
- Digitize and streamline workflows to automatically connect the right people, departments, and systems of record for faster processing.
- Provide a seamless customer experience, with omni-channel support, to increase convenience, satisfaction, and loyalty.

Find out how ServiceNow helps you improve customer satisfaction at servicenow.com/customer-workflows.

Use Case

Onboarding customers or products

Challenges

- Multiple teams using different systems make it difficult to collaborate to fulfill requests
- Manual processes add delays and errors, driving up costs and negatively impacting the customer experience
- Limited visibility into who is doing what makes it hard to track and communicate status to keep customers informed and the process moving

Solution

Customer Service Management plus other products available on the Now Platform®

Results

- Reduce onboarding costs and errors
- Capture incremental revenue by getting accounts or products active faster
- Increase customer satisfaction and loyalty
- Increase customer and agent satisfaction by streamlining processes and providing visibility into issue status

ServiceNow onboarding workflows

The specific stages and steps for onboarding workflows vary widely, depending upon the industry and use case, but all can be digitized and automated within ServiceNow.

1 **Initiate** – A request may be made for a new customer or product, triggering a digitized, automated workflow. The platform integrates with relevant databases and systems to help validate that inputs and tasks are done correctly the first time and track the real-time status of the process, from initiation to completion.

2 **Pre-approve** – The customer or company representative will automatically be asked to fill in any appropriate forms or provide any necessary documentation for pre-approval. When completed, the customer or company representative will be automatically notified.

3 **Collect data** – The case will be auto-routed to an appropriate service representative to verify all necessary documents have been collected and request anything that is missing. Once completed, the customer or company representative will be automatically notified.

4 **Conduct due diligence** – Tasks are auto-routed to appropriate analysts or teams for processing. For example, credit analysts may conduct credit checks, while legal teams conduct background checks. Steps can be done serially or in parallel, with all details captured by the single system of record, so that everything needed to make a determination is included as part of the workflow. If something more or different is needed, a request can be sent through the platform to track and complete.

5 **Fulfill** – The request is fulfilled with any necessary documentation auto-generated and sent to the customer or company representative for review. This stage will vary based on the specific use case—it could include a new account setup, new product setup, equipment shipment and setup, and so on.

6 **Resolve and close** – A communication to the customer or company representative, based on their preference, will notify them their request is complete.

7 **Provide audit trail** – All the data, communications, and timelines are tracked by the platform, making information easy to pull for reports, audits, and analysis.