

Optimally Business Performance

We bring enterprise-level Business Process Automation to small and medium sized businesses, with no need for internal IT resources. Designed to remove manual workflows, saving time, increasing productivity, reducing errors, and enabling growth. Billed on a monthly basis AFTER implementation - a truly risk-free path to enhanced efficiency and scalability!

Explore how our cutting-edge Business Process Automations can streamline your processes, boost productivity, and drive success.

Our team of experts is ready to provide tailored solutions to help achieve your goals!

Automating Client Onboarding and Improving Relationships for a Technology Firm

Optimally recently worked with a Technology Firm who manages multiple products, including white label third-party offerings.

Client Challenges:

The Technology Firm had encountered substantial obstacles when it came to onboarding new clients. The process of gathering and inputting essential information from multiple systems proved to be a time-consuming ordeal, fraught with errors, ultimately leading to a subpar client experience.

Pain Points Addressed:

1. MULTIPLE DATA ENTRY POINTS:

The client grappled with information scattered across various platforms, including the CRM, the Accounting system, 3rd party systems, Internal Proprietary Systems, and File Share Locations, leading to inefficiency and redundancy.

2. DEFICIENT CLIENT ONBOARDING EXPERIENCE:

The existing onboarding process was convoluted, error-prone, and disorganized. This complexity hindered the firm's ability to onboard clients swiftly and accurately.

Optimally Solutions



CENTRALIZED DATA ENTRY:

We created a centralized data-entry point where all necessary information for every product could be entered, eliminating the need for multiple data entry points across the 7 systems.



AUTOMATED UPDATES ACROSS ALL SYSTEMS:

Once the data was entered and validated, our workflow automatically updated all relevant systems, regardless of the combination of products involved. Additionally, confirmation notifications were promptly sent to the appropriate Client Success resources, facilitating a smooth onboarding experience.

Results

Through the centralization of data entry and the automation of workflows, the challenges faced by the client were effectively overcome. This transformation resulted in significant benefits for the Technology Firm, including an average reduction of 2.5 hours of manual data entry per client. Moreover, it substantially enhanced the client experience, bolstered data accuracy, and nurtured more robust partner relationships. The Technology Firm's commitment to delivering a seamless, error-free experience has cultivated trust and confidence among its clients, paving the way for enhanced collaboration and the establishment of enduring, long-term partnerships.