DOCKETRY
Agents for Intelligent Work

A renowned bank in the US
enhanced customer satisfaction with a fast and easy onboarding process with Docketry

10X
faster customer onboarding

Top bank in the US wanted to enhance customer satisfaction by improving the efficiency of the customer onboarding process. Take a look at how Docketry helped them provide a better customer experience, improve efficiency and save costs.

Challenge

- A renowned bank in the US wanted a solution to streamline its customer onboarding process and reduce the time taken for customer onboarding.
- The bank was onboarding 6000+ customers every month and the current process took around 45 minutes per application.
- They wanted to improve the time taken for document processing and especially for KYC processing.
- They wanted to provide a better customer experience, improve efficiency, and save costs on the onboarding process.

Our Solution

We integrated Docketry into the existing operational workflow and automated the capture of documents and images from their internal server

The extracted data was sent to their BPM system. In case of exceptions, we set up rules for manual intervention and also added sentiment analysis for feedback forms to gauge customer satisfaction.

✓ FAST AND ACCURATE DATA EXTRACTION
Captured data from complex KYC documents and application forms with ease and ensure accuracy with a confidence score and analytics

✓ MINIMAL HUMAN INTERVENTION
Automated KYC processing and account opening forms processing with humans in the loop for exception handling to ensure accuracy with low-touch processing.

✓ SEAMLESS INTEGRATION WITH EXISTING WORKFLOWS
Effortlessly integrated Docketry with existing operations and processes with APIs to accelerate and simplify the customer onboarding process.

✓ SECURITY AND PRIVACY
Created a custom search function to make BOLs searchable with the delivery number, BOL number, sales order, etc.

✓ FRAUD PREVENTION
Decreased the likelihood of fraud by implementing various validation checks and Docketry's signature validation feature included for fraud prevention.

✓ FEEDBACK ANALYSIS
Implemented Docketry's sentiment analysis feature for customer feedback analysis to improve customer satisfaction and reputation.

Outcomes

Docketry was seamlessly integrated into their onboarding process and improved their process efficiency by several times.

With faster account opening forms processing and KYC processing, the bank was able to onboard its customers faster and more efficiently

The errors in the onboarding process were reduced and the customer satisfaction percentage rose.

- ✓ 97% KYC processing and forms processing automated
- ✓ 70% cost reduction
- ✓ 10X faster customer onboarding
- ✓ 99% reduction in document processing time
- ✓ 90% reduction in manual working hours
- ✓ 75% improved customer satisfaction