Xceptor Client Lifecycle Management

Boost efficiency with end-to-end lifecycle automation

The hidden cost of fragmented client management

Financial institutions struggle with disconnected systems and manual processes across the client lifecycle:

- **Missed opportunities:** poor coordination results in delayed revenue generation

- **Frustrated clients:** slow and clunky onboarding leaves clients dissatisfied

- **Multiple teams:** transitions between teams consisting of manual touchpoints causes delays and errors

- **Lack of visability:** inadequate oversight across client touchpoints leads to inability to determine where in the lifecycle the client is (relationship manager)

- **Unable to manage compliance lifecycle milestones:** relying on people to reach out to clients to ensure documentation is completed/renewed leads to missed deadlines

- **Data silos:** multiple systems create barriers between relationship management, onboarding, and account servicing
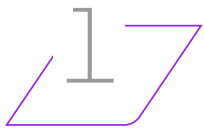
Start client relationships on the right foot - in days, not weeks

Xceptor offers a single platform to manage your entire client journey, from initial request through onboarding to ongoing account management – with real-time visibility across the process. Unlike point solutions that address only specific stages, our platform seamlessly integrates all client lifecycle processes for faster onboarding and happier clients. It connects with your existing systems and empowers business users to configure workflows independently, without IT dependency. Additionally, Xceptor excels in processing complex, unstructured data, and has the flexibility to adapt to changing requirements, future-proofing your operations.

Streamline relationship management	Accelerate client onboarding	Optimize account opening and servicing
• Capture and validate client requests across all channels	• Create digital task libraries for business users all in one place	• Seamless integration with all internal systems
• Automate due diligent checks and risk validation	• Automate document generation and distribution	• Automated account set up across platforms
• Provide instant feedback on client submissions	• Execute tasks across markets/products concurrently	• Intelligent distribution of renewals and reminders
• Handle complex multi-signatory processes efficiently	• Maintain real-time progress visibility	• Dashboard highlighting upcoming deadlines
• Track SLAs and trigger automated follow-ups		• Streamlined offboarding processes
• Maintain complex audit trade of all interactions		

Xceptor

Improve client experience while accelerating time to revenue

Our clients have transformed their onboarding journey into a fast, transparent, and accurate process while reducing manual effort.

1
Rapid onboarding
From 6 weeks to 6 days

2
Increased efficiency
50% reduction in account opening times

3
Greater productivity
Increased volume of account requests processed

4
Enhanced governance
Standardized processes with improved oversight to support compliance

> We turned to Xceptor as it gave the best fit of the qualities we needed – genuine automation and flexibility for the business users. We recognized that not only would it be a cost effective way to automate managing our new clients, but it could be applied to our existing customers too. We also saw great potential for Xceptor to be used for other data problems in our organization and Xceptor has indeed proved very valuable for our operations team."

Head of Operations, Maitland

Key capabilities

Intelligent process automation

- No-code workflow designer for business users
- Automated document generation and routing
- Real-time data validation and enrichment
- Complete audit trail and reporting
- SLA monitoring and automated escalations

Automated document management

- Automated processing of unstructured documents
- Intelligent data extraction and validation using AI
- Centralized document repository
- Automated indexing and retrieval
- Secure document distribution

Enterprise integration

- Pre-built connectors to core banking platforms
- Integration with KYC/AML providers for automated compliance handling
- Real-time data synchronization
- Flexible deployment options (cloud/on-premise)
- Role-based access control

Learn more   Book a demo

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