

MASTERCLASS

Onboarding & Client Lifecycle Management

MASTERCLASS: ONBOARDING & CLIENT LIFECYCLE MANAGEMENT



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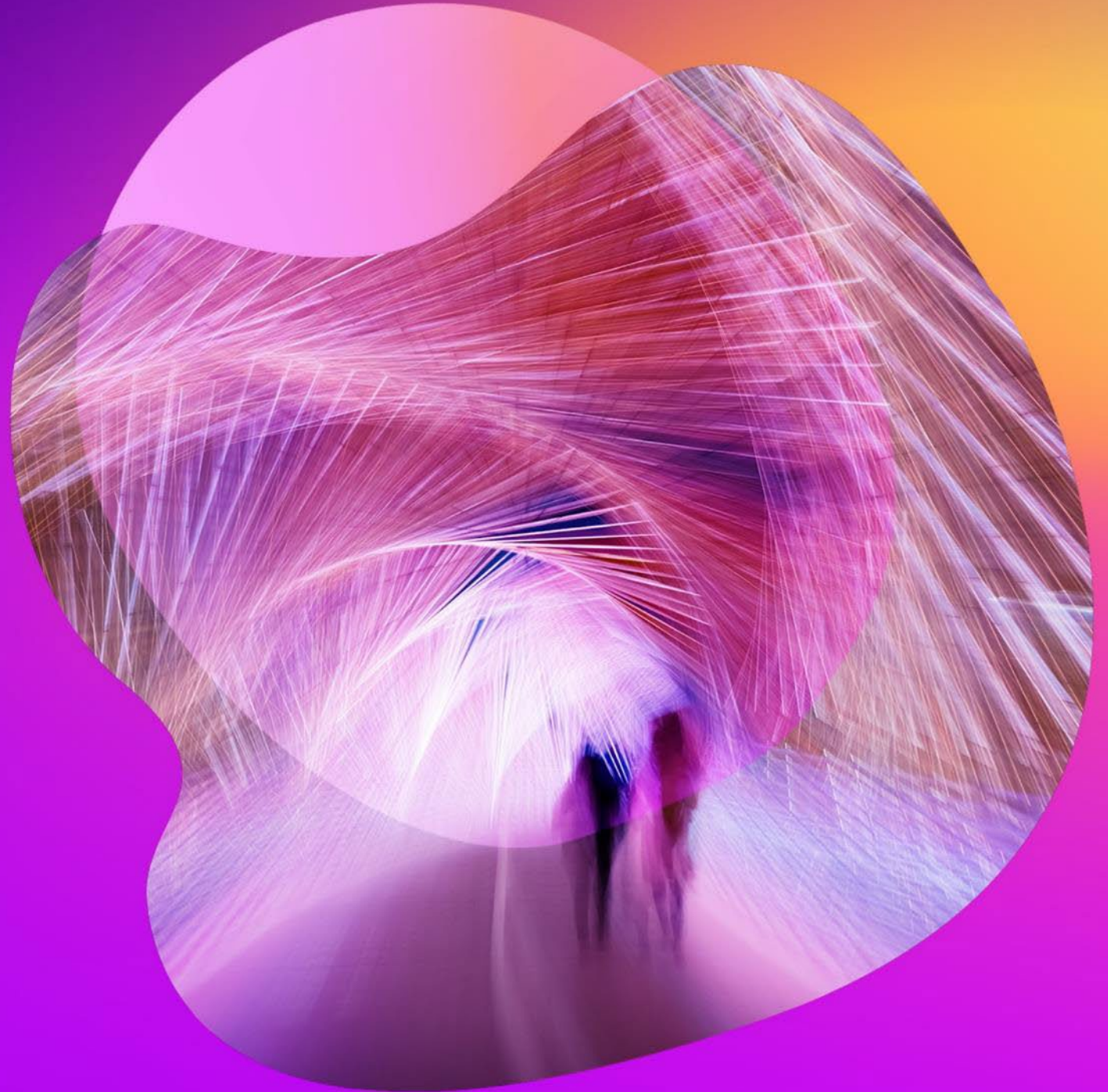




Accenture

Client Onboarding Industry Insights

9th October 2025



CLIENT ONBOARDING



Achieving the Right Balance in Client Onboarding

Onboarding solutions need to balance delivery of a great client experience with execution of internal controls to enable effective risk management and compliance

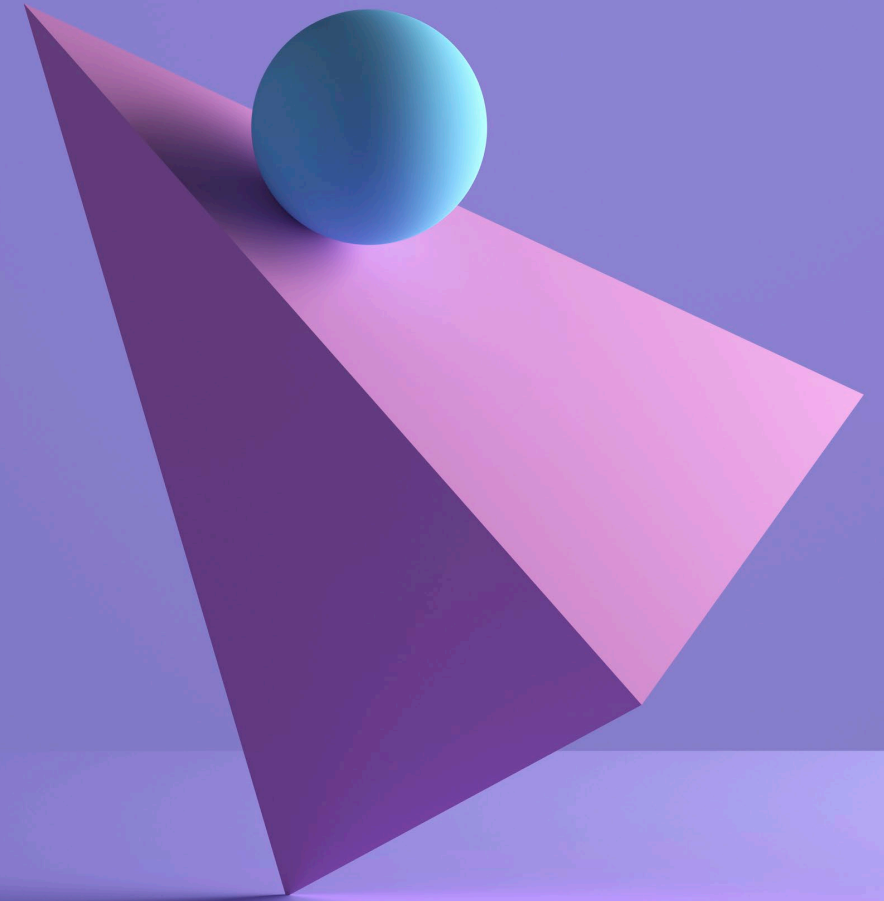
Transforming Onboarding from a Necessity into a Competitive Advantage can:

Add **+77 relationships** a year (for a bank onboarding 1,000 customer annually)

Earn **\$300k** more daily revenue for banks earning \$100m in new sales annually **by reducing onboarding processing times by a day**

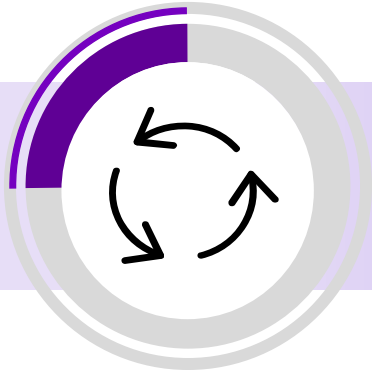
Deliver higher lifetime revenue per customer (based on 85% respondents).

Source: Celent & nCino “Transform Commercial Onboarding into Your Competitive Advantage”



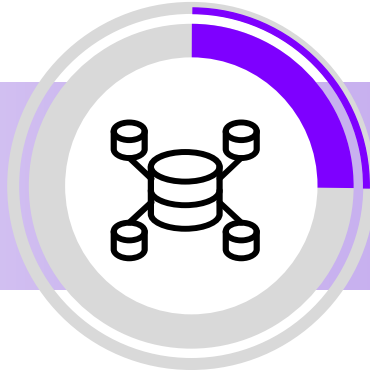
Key Components of an Effective Client Onboarding Solution

4 solution components can help organisations achieve a more effective client onboarding experience for clients, whilst also delivering effective controls



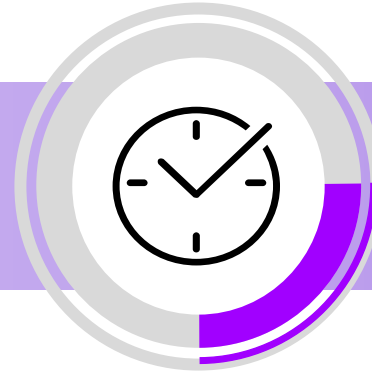
INTEGRATED DIGITAL
ONBOARDING

Use of a **digital onboarding platform**, integrated with credit and KYC workflows, allowing a seamless **data-driven** customer journey



HOLISTIC CUSTOMER VIEW

Aggregation of key data sources, utilising entity resolution and enabling a **single customer** view to be used throughout the **customer lifecycle**



CONTINUOUS
MONITORING

Moving towards **continuous monitoring** of clients for changes underpinned by **clear data collation** and dynamic risk scoring



AUGMENTED OPERATIONS

Automating activities and refocusing colleagues on customer service and risk mitigation in an **agentic human + machine model**

>
**Thank
you!**

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