



unqork

Make that first impression count

A client-centric approach to onboarding for happier clients and employees



In a rapidly changing industry, wealth management firms face growing competition, changing regulations, and increased levels in the volume, complexity, velocity, and variability of services. But one thing remains the same—the importance of a first impression.

In a digital age, the need to ensure a positive onboarding experience for clients and advisers is more important than ever. A well-designed onboarding process results in happier clients. Firms and advisers are also happier when the onboarding experience can support faster revenue recognition, cross-selling, and client retention. Best of all, efficient onboarding can help give advisers more time to do what they do best—serving their clients.

Unfortunately, many onboarding processes involve manual steps and tedious back-and-forth exchanges between clients

and advisers. Onboarding can take days or even weeks. The result can be a poor client experience, decreased adviser productivity, and lost revenue.

To remain competitive and support growth, wealth managers are looking to:

- Deliver great client and employee experiences
- Enable scalability and future proof their operations
- Drive productivity and efficiencies.



KPMG and Unqork solutions for onboarding

KPMG and Unqork help wealth management firms provide enhanced onboarding experiences designed to improve client satisfaction and adviser productivity.

KPMG taps into our deep understanding of the people, processes, technology and data involved in the onboarding process to help clients identify key differentiators that they want to include in products and processes, and then align those expectations to their unique, organizational culture. KPMG has created a reference architecture that is highly customizable and tightly integrated across the engagement cycle. Additionally, KPMG combines Unqork’s flexible composable architecture and pre-built Marketplace templates with tested methodologies, industry knowledge, templates and digital tools designed to enhance the delivery process for application development. This can help improve the quality of the discovery and requirements-gathering phase so teams can focus sooner on execution and reduce the time required for configuration.

As a cloud-based, no-code offering, the Unqork platform empowers organizations to rapidly build robust enterprise-grade applications without writing a single line of code. With no-code, organizations can devote all their development resources to addressing business challenges instead of technical ones.

Because Unqork’s platform is built for rapid configuration and implementation, firms can be up and running in weeks instead of months with a solution that is tailored for their business processes.

By leveraging Unqork, KPMG can provide a modular, flexible architecture and a collaborative platform that enables smoother customer experiences, faster speed to market, and the ability to respond more rapidly to market demands and regulatory requirements.



KPMG accelerators enable rapid time to market

- End-to-End Process Flow
- Journey Maps for Key Personas
- Business Architecture Diagram
- Technical Architecture Diagram
- Data Model/Data Table
- Data Dictionary
- UX/UI and Wireframes
- List of Standard Integrations and Descriptions
- Business (Functional) Requirements/User Stories
- Test Plan



Potential benefits with KPMG and Unqork

KPMG and Unqork onboarding solutions are designed to help wealth management firms:



Accelerate time-to-revenue by streamlining the processes required for opening new accounts



Increase client satisfaction with custom experiences that help optimize the onboarding process



Improve adviser productivity by minimizing manual work through digitized forms, workflows, and collaboration between client and employee throughout the experience



Mitigate risk by reducing processing errors and improving regulatory compliance



Reduce operational cost through process efficiency and scalability



Improve cross-sell revenues by improving client management and cross-sell opportunities through advanced analytics



Amplify the brand by tailoring the employee and client user experience/interface to the firm's branding and culture.



KPMG services and capabilities for Unqork

KPMG has over 175 trained professionals who have helped deliver more than 40 digital solutions based on the Unqork platform for clients around the world. We leverage our deep industry and process knowledge at every stage.



Strategy and operating model design—assisting in the development of strategies and target operating models to drive no-code adoption into the client's existing IT ecosystem



Capability assessment and definition—identifying key capabilities and potential gaps based on our client experiences



Product vision and design—providing key insights into the requirements-development process and product design to deliver an improved user experience and higher levels of adoption



Agile implementation—configuring solutions using a tested, iterative, and tailored approach to meet client requirements



Enablement and support—enabling client teams with training and codevelopment guidance to support DIY models and the scaling of automation across platforms



Learn more

Visit read.kpmg.us/unqork to learn more about how KPMG and Unqork can help you create distinctive client onboarding experiences while increasing the productivity of your employees.

Some or all of the services described herein may not be permissible for KPMG audit clients and their affiliates or related entities.

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