

## CREATING A FRICTIONLESS SMALL BUSINESS ONBOARDING JOURNEY

### BUSINESS PROBLEM

A multinational bank was struggling with small business account onboarding. Despite strong demand, onboarding completion rates were low, and customers reported inconsistent experiences across regions and channels.

#### Problems:

- High abandonment rates during onboarding
- Disconnected digital and in-person onboarding processes
- Lack of a unified framework to capture and act on onboarding insights
- Limited visibility into regional variations in customer experience

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JourneyTrack allowed us to finally see our onboarding process from the customer's point of view—making it clear where we needed to invest.”

— Head of Customer Experience,  
Global Bank

### SOLUTION

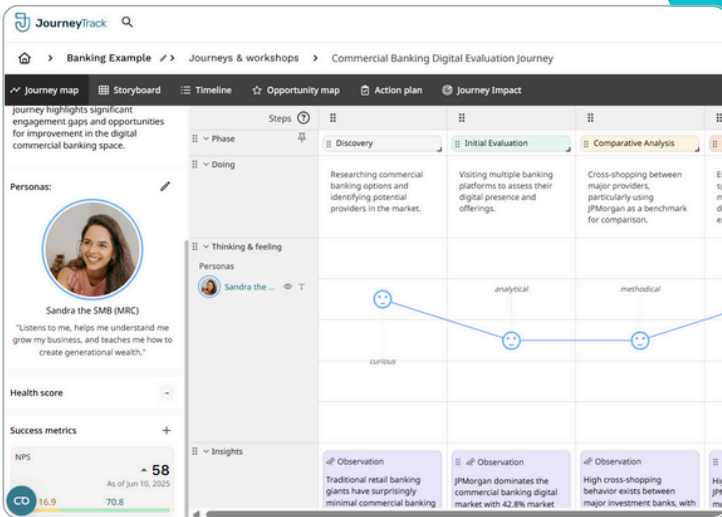
The bank used JourneyTrack to map the end-to-end onboarding journey for small business customers, including branch visits, digital interactions, and back-office processing. By integrating data from CRM and customer feedback tools, the bank identified critical points where customers dropped off. JourneyTrack's collaborative workspace allowed regional teams to co-create

improved processes while maintaining brand consistency.

#### Key Benefits for the Team:

- Dynamic journey maps showing both digital and physical touchpoints
- Cross-regional collaboration to standardize best practices
- Tagged insights for quick prioritization (Pain Points, Needs, Opportunities)

# RESULTS



## Impact of Utilizing JourneyTrack:

- 23% faster onboarding completion
- 17% increase in account activation rate
- Improved NPS from 42 to 58 within six months

By using JourneyTrack, the bank shifted from reactive fixes to a strategic, customer-first onboarding model, increasing satisfaction and reducing costly churn.

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We used to address onboarding challenges piecemeal. Now, JourneyTrack gives us a unified roadmap to act decisively."

— Regional Director,  
Business Banking

# BOTTOM LINE

Before JourneyTrack, onboarding issues were tackled in silos, often with inconsistent results. Now, the bank has a single, dynamic view of the customer journey, enabling swift, coordinated improvements that boost satisfaction, speed, and loyalty.