

## DIGITAL TRANSFORMATION

# Think hard before outsourcing your new onboarding process

Christian van Ramshorst on November 27<sup>th</sup> 2017



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Are you upgrading your outdated onboarding processes to raise conversions and meet customer expectations in the digital age? Many organisations are. But too many are taking the easy route, and jumping straight into the open arms of solution providers promising quick-fix solutions. The smarter path is to put strategic development before solution providers, because a well-designed onboarding process will support your corporate strategy.

Here we think through how organisations can get a grip on the redesign process by using a simple 3 Step plan. Begin with strategic relevance. Next relate your strategy to concrete issues like customer interaction and regulatory requirements. Only then work with solution providers to turn the strategy into tangible customer experience.

### **1: Start with strategic alignment**

Why are you changing your onboarding process? Maybe to fix a problem such as falling conversion? This problem certainly needs fixing but it's a short-term issue. And approaching the redesign as a fix for immediate problems often turns out to be short-term thinking. Looking at it from a strategic perspective opens a wide array of options which will enable the onboarding process to support your strategic goals around customers, products and expansion.

Ask yourself these questions at the beginning of the process:

- How can the onboarding process support our corporate strategy?
- What are our customer segments? How tech-savvy are they?
- What does our product/expansion roadmap look like? For which products and countries should the onboarding process be used?
- Do we need to develop our own capabilities, or is it possible to outsource activities?
- What internal processes will benefit from a revised onboarding process?
- How do we want to be perceived as a brand?

By placing the onboarding process within the context of your corporate strategy, a future-proof process can be designed.

## 2: Develop an onboarding process based on strategic relevance

When the strategic goal of onboarding is clear, next consider how the onboarding process will deliver that strategy. Ask yourself:

- What will make a great user experience?
- How should we incorporate specific regulatory requirements in a seamless manner?
- How should we manage a flexible and adaptive architecture?

Answering these questions will identify what the onboarding process should look like, and enable you to think cogently about engaging specific solution providers.

## 3: Turn the framework into reality

As mentioned in our [first onboarding blog](#), a future-proof process consists of modular building blocks that can be implemented or skipped depending on your products, customer preferences, customer identity attributes and applicable legislation.

At this point in the process, specialised solution providers can be brought in. They will provide or improve specific building blocks, and help turn your preferred customer interaction into concrete customer experience. They will have different methods of performing each step. Understanding the strengths and weaknesses of each method will enable your organisation to construct a future-proof process which delivers value for your users and your internal company processes.

Solution providers can be categorised in various ways, such as:

- Is the provider a specialist or not? For example, IDnow and Jumio are specialist identity solutions when considering 'Document Ingestion', while Scansys provides general solutions applied to a variety of products and services.
- What specific solutions do different providers offer? For example, some solution providers can automatically identify characters on ID documents when they are placed before a camera. Others require the customer to take a picture before extracting the information. These small variations can be used to impact customer experience in positive ways.



Figure 1: Building blocks of the onboarding process.

**Summary: Build your strategy first. Then outsource appropriately**

Onboarding is often the customer’s first tangible experience of a company. So redesigning the process is an essential part of every organisation’s digital transformation. The possibilities are endless and every solution provider can offer something different. What are the odds that engaging with a single provider in an early

stage will result in an optimal solution for your organisation? It’s crucial to first understand what you want to achieve. Only then should you look at what each provider can contribute.

Treat your onboarding process as a unique selling point. Evaluate your corporate strategy, identify future onboarding needs, and start creating a unique asset that will provide long-term value instead of a short-term conversion increase.

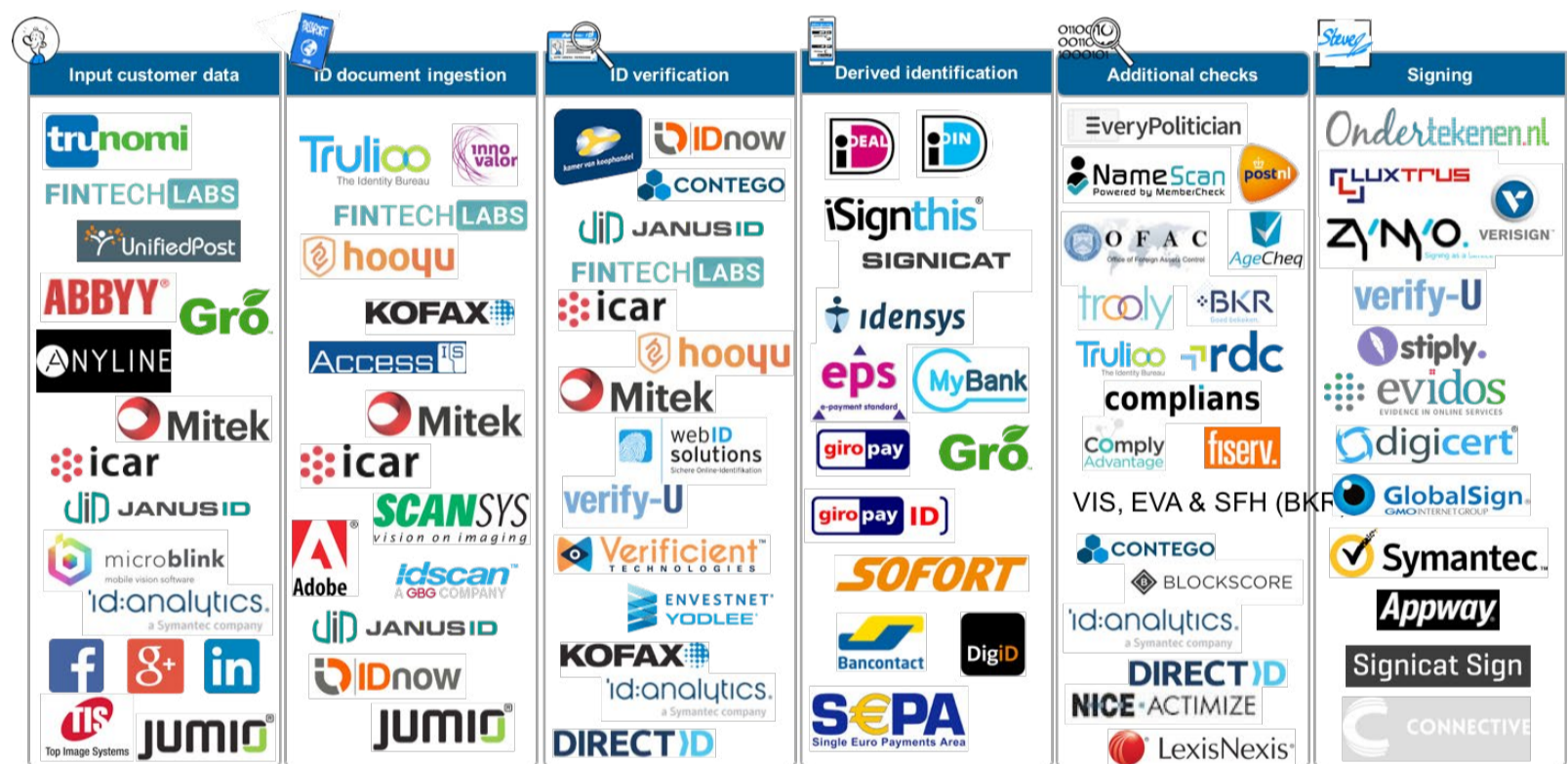


Figure 2: Examples of solution providers across the various steps in the onboarding process. Can't see your logo here? Get in touch – we would like to know more about your solution.

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