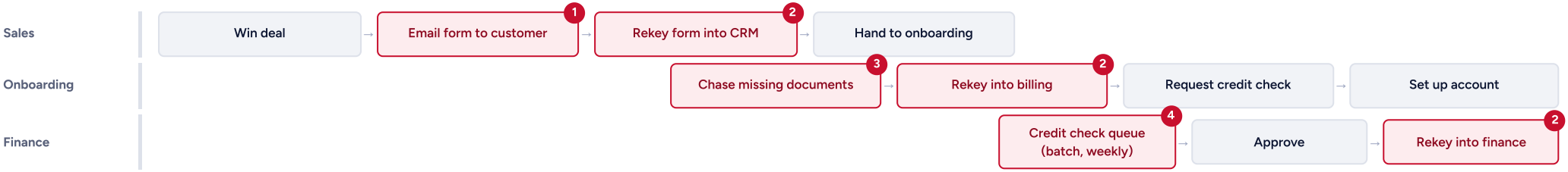
SAMPLE DELIVERABLE · ILLUSTRATIVE

Customer onboarding: As-Is and To-Be process

Calibrane
Strategy. Transformation. Intelligence.

How a slow, manual process is redesigned before any technology is chosen. This sample uses the same fictional mid-sized services organisation as our capability map sample. Figures are illustrative, not client results.

AS-IS · 11 STEPS · 4 HAND-OFFS · CUSTOMER DETAILS KEYED IN 3 TIMES



TO-BE · 6 STEPS · 1 HAND-OFF · DETAILS CAPTURED ONCE



Pain point (numbered by root cause) · Redesigned step · Automated step, human reviews exceptions

Root causes

1. **No single entry point.** Each team designed its own form.
2. **No shared customer record.** Three systems each hold their own copy, so data is keyed in again.
3. **Completeness checked late.** Gaps are found days after the form is sent.
4. **Credit policy run as a weekly batch,** even though most cases are low risk.

Key requirements

- Customer details captured once and shared with CRM, billing and finance
- Form cannot be submitted with mandatory items missing
- Low-risk credit cases approved by rule; others routed to finance within 4 hours
- Every change to the record is logged
- Personal data handled under UK GDPR and the NDPA

How the benefit is measured

MEASURE	BASELINE	TARGET
Days from signed deal to live account	Measured in week 1	Reduce by half
Times details are keyed in	3	1
Forms returned incomplete	Sampled	Under 5%
Customer effort score	Surveyed	Improve