



**Subsector:** Corporate Banking

**Job Family:** Middle Office

**Impact Level**

Today, this role is responsible for onboarding new corporate clients, and ensuring that they are well-equipped to use the products and services.

Medium Impact

## Consolidated Activities

	Today	Future
<b>Document Preparation and Collection</b>	Execution is high volume and document-intensive. RPA can facilitate faster data entry.	There is an opportunity to digitise the onboarding process end-to-end. Digital channels can help to streamline and accelerate data gathering process, support e-signatures and reporting, ultimately, leading to improved client onboarding.
<b>Account Opening</b>	Execution is automated. Online account opening services can pre-populate forms on behalf of the clients and eliminate the need for unnecessary form-filling and data entry.	Digital platforms will continue to be leveraged. Human intervention is required to provide oversight, manage complicated cases, and address issues that are hindering onboarding.
<b>Training Facilitation</b>	Execution involves providing hands-on product training to clients, and ensuring end users are capable of utilising products.	Banks will increasingly rely on digital/self service platforms that support online and personalised training to end users anywhere, anytime.

In the next

**3-5** years ...

With the rise of self-service platforms, job holders will increasingly leverage technology to onboard clients.

### Skills Differentiators:

- ▶ **Project Management:** The job holder will need to deliver the objectives of the engagement, manage working groups, and deliver projects in a consistent manner.
- ▶ **Complex Problem Solving:** The job holder will ensure products are implemented and examine complex problems that are escalated to leverage available resources to develop and execute solutions.
- ▶ **Advanced Digital Acumen:** On-going upskilling will be required to ensure the job holder is familiar with new electronic platforms, and capable of using advanced AI-tools.
- ▶ **Process Excellence:** With good understanding of the existing operations, the job holder can help to highlight the root cause of their process inefficiencies and identify the right processes for automation.
- ▶ **Change Management:** The job holder will have the mindset and ability to drive effective change to ensure the client can successfully adopt digital solutions to support their day-to-day operations.

