



Transforming B2B Onboarding with Interactive Customer Data Intake UIs



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Introduction

Onboarding a business client is often a lengthy and complicated process, especially in the insurance and banking industries.

In the insurance industry, B2B onboarding requires customers to complete lengthy and complex PDF forms and attach multiple supportive documents to their applications. The data gathering process involves multiple stakeholders both on the client's side and the insurer's side.

Moreover, there is high variability in the documents and data that are required for B2B onboarding across different types of business clients. This complicates the workflow for the insurer and leads to delays in completing the onboarding process.

For banks and other financial institutions, B2B onboarding is a similarly complex process that changes frequently in step with the regulatory landscape. In order to comply with regulations such as KYC (Know Your Customer) and AML (Anti-Money Laundering), banks must gather a large amount of information from their business clients.

The complexity leads to a time-consuming and paper-heavy process.

Challenges of B2B onboarding:

- ✓ Time-consuming
- ✓ Error-prone
- ✓ High variability in documents and data requirements
- ✓ Friction due to delays in completing the process



Benefits of digital customer data intake:

Digital customer data intake is the process of gathering customer information digitally end-to-end, without interruptions in the workflow or any manual processing in-between.

For B2B processes which often involve a complex array of data, digital customer intake is transformative. It reduces errors and omissions, speeds up decision-making, and improves customer satisfaction.

Digital customer data intake means that customers provide their information electronically, and this data is then fed directly into the company's systems without manual data handling and entry.

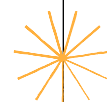
Digital customer data intake transforms the B2B onboarding process by simplifying the gathering of information for both the customer and the business.

Some benefits of digital onboarding include process and workflow improvements:

- Simplified information gathering process for both customer and the organization
- Shorter B2B onboarding completion time
- Reduced errors and delays in B2B onboarding process
- Standardized B2B onboarding process across different types of business clients while preserving variability

A digital customer data intake solution provides a number of other benefits, such as:

- The ability to gather required information upfront
- The ability to validate data in real-time
- Integration with other systems
- Flexibility to change the process as business requirements change



What is digital customer data intake?

Digital customer data intake is the process of gathering customer data electronically, typically via a web-based form or a guided interactive process. A key feature of digital customer data intake solution is that it provides a structured way to gather customer data that is integrated directly with internal and/or third-party systems.

The evolution of data intake methods: from manual to digital



Paper forms

The age-old way of gathering customer data is via paper forms, which often requires in-person meetings with the clients. However, the paper-based B2B onboarding process is becoming less and less feasible in today's digital world.



PDF forms

PDF forms are the digital equivalent of paper forms. They still require the customer to print them out, fill and sign them, then scan and send them over to the organization via email or other communication channel. This is an improvement over paper forms, but the process still has significant friction points.



Fillable PDF forms

Probably the most common form of gathering customer data for B2B onboarding today, fillable PDF forms offer the customer the convenience of being able to fill out the form on their computer without having to print and scan a handwritten form. After completing the form, the customer sends it as an attachment via email or uploads it to a company website.

This is a significant improvement over paper forms and non-fillable PDF forms, but there are still some drawbacks. Fillable PDFs are not responsive, and they are not always compatible with all browsers and devices, and can also be difficult to update and change.

When digital is not really digital

The main benefit of digital data intake is that it eliminates the need for manual touch points altogether.

Some common data collection practices involving electronic tools, such as data gathering via email and PDF forms are not digital data intake as they still require manual touchpoints.

Email and PDF are not digital data intake because these methods:

1. Do not provide a structured way to gather customer data: Email is typically used to send unstructured text, and PDF forms often contain unstructured input.
2. They require manual data entry: In order for the data to be used, it must be entered manually into a database or another system.



Online forms

Online forms are the next step in the evolution of data intake methods. They allow customers to fill out forms online, enabling data validation at the point of entry to save time and reduce errors.

Web forms are a common type of digital customer data intake solutions today.

However, these forms are not a great fit for complex and lengthy B2B onboarding processes due to usability issues that plague web forms.

“Web forms are still mostly based on old paper forms—zombie leftovers of system-centric UIs (vs. user-centric).” Toptal.com

Most web forms today—whether desktop or mobile—are simply terrible user experiences. Many organizations, especially in the B2B onboarding space, don't follow web form UX design best practices. As a result, most B2B onboarding web forms are frustrating, slow to fill out, and put usability last.

B2B onboarding forms cause high levels of cognitive strain to the users because they:

- Are very lengthy and complex
- Are overwhelmingly error-prone
- Lack default values
- Lack auto-completion
- Lack auto-formatting
- Handle input errors badly

Digital customer data intake solutions via interactive UIs

Web forms are evolving into interactive digital UIs. In order to provide a more user-friendly, seamless user experience, interactive digital data intake journeys eliminate many of the frustrations associated with customer data collection by implementing an interface that doesn't bear any resemblance to conventional forms.

A digital customer data intake solution is a web-based data intake journey that allows businesses to quickly and easily collect customer data online.

The main hallmarks of digital intake solutions are:

- Provide a structured way to collect and validate customer data
- Data is integrated into internal systems, eliminating the need for manual touchpoints or data entry

Interactive data intake UIs offer an entirely new paradigm whereby the painful, clunky, tedious and repetitive “typing into forms” transforms into an seamless and effortless process.

Common features of digital data intake UIs:

- Clean and clear UI with underlined areas to signify where text inputs go
- Clearly defined steps and time estimates for completing the process
- Save and continue later
- Responsive and mobile-friendly design
- Autofill
- Integration with internal systems to push-and-pull data in real time
- Conditional branching logic
- Defined user roles with only relevant content shown to each user
- Integration with third-party solutions (password managers, social sign-in)
- Validation at the point of entry

Conventional UIs are disappearing, and web forms are a part of that shift.

Certainly, some need for user input forms will never go away, but interactive interfaces—where providing data, documents, and signatures feels more natural and less like data entry — will become widespread.

The benefits of interactive UIs for digital data intake



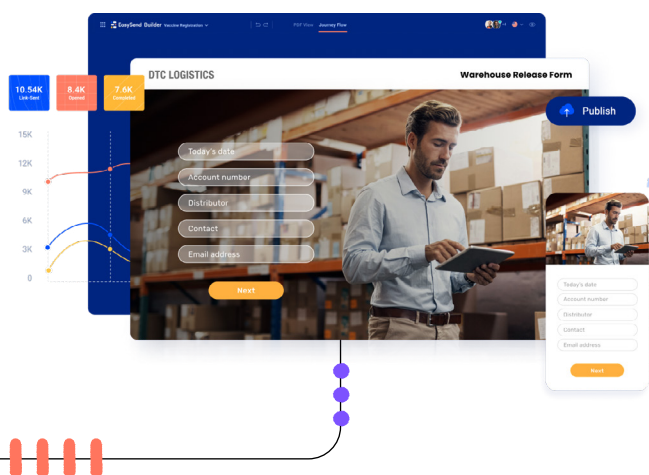
Streamline B2B onboarding

A digital customer data intake solution streamlines the B2B onboarding process by automating the gathering and validation of customer data. This significantly reduces the time and effort required to onboard a business client.



Flexible workflow

In addition, a digital customer data intake solution provides the flexibility to easily adapt to changing regulatory requirements. This can help banks and other financial institutions to keep up with compliance-related changes without incurring significant costs or delays.





Improves customer experience

A digital customer data intake solution improves the customer experience by providing a simpler and more efficient way to gather the required information.



Boosts completion rates

Digital data intake reduces the frustration and confusion often associated with B2B onboarding, and helps to ensure that customers are more likely to complete the process.

Digital customer data intake can therefore help to transform the B2B onboarding process by simplifying the information gathering process and reducing the time and effort required to onboard a business client.

Transforming the data intake for B2B onboarding

There are multiple ways organizations can transform B2B onboarding into interactive data intake UIs.



Partial transformation

The first way to transform B2B onboarding is by integrating digital customer data intake into the current B2B onboarding process. This can be done by using digital forms in addition to paper forms or by using digital signatures.

This method has the advantage of not requiring a complete overhaul of the B2B onboarding process.

However, it doesn't eliminate manual touchpoints, and it doesn't take full advantage of the benefits that digital customer data intake provides.



Full transformation

The second way to transform B2B onboarding is by fully replacing the current process with a digital customer data intake solution.

This method takes full advantage of the benefits of digital customer data intake, such as simplifying the information gathering process, reducing time required to complete B2B onboarding, reducing errors, and increasing process flexibility.



How to transform your B2B onboarding process

In-house development

The first option for transforming B2B onboarding is to develop a digital customer data intake solution in-house.

This option has the advantage of allowing organizations to have full control over the solution and to tailor it specifically to their needs.

However, it also has several disadvantages. First, developing a digital customer data intake solution requires significant time and resources. Second, it can be difficult to find the right talent with the necessary skills to develop the solution. Third, it takes a very long time to develop a solution, which can delay the transformation of B2B onboarding.



Outsourcing development

The second option for transforming B2B onboarding is to outsource the development of a digital customer data intake solution.

This option has the advantage of being faster and less resource-intensive than in-house development, but can still be very expensive. It also allows organizations to tap into the expertise of experienced developers.

However, it also has several disadvantages. First, it can be difficult to find a reputable and reliable development partner. Second, there is always the risk that the solution will not meet the organization's needs or expectations.




No-code digital data intake platform

The third option for transforming B2B onboarding is to use a no-code platform to develop digital customer data intake user interfaces.

This option has the advantage of being fast and easy to implement, as well as being less expensive than developing a solution in-house or outsourcing the development.

However, it also has several disadvantages. First, the organization may not have full control over the solution and may be limited in terms of customization. Second, the organization may not be able to find a platform that meets all of its needs.

These drawbacks can be minimized by carefully selecting a digital customer data intake platform that is flexible and customizable.



The best way to transform B2B onboarding

The best way to transform B2B onboarding depends on the specific needs of the organization. When choosing how to digitize B2B onboarding, organizations should consider their specific needs in order to select the best option for them.

If the organization has the time, resources, and expertise to develop a solution in-house, then that may be the best option.

However, since enterprise-grade and fully customizable no-code solutions are available, it is most often more advantageous to use a digital customer data intake platform and put the organization's internal resources to better use.

For organizations that want to digitize B2B onboarding fast, using a no-code digital customer data intake platform is the best option.

This will allow the organization to quickly and easily implement a digital customer data intake solution with minimal risk and expense while taking advantage of cutting-edge UX expertise that a specialized platform delivers.

The right digital customer data intake platform can transform B2B onboarding by simplifying the information gathering process, reducing time required to complete B2B onboarding, eliminating errors, and increasing organizational flexibility.



What to look for in a digital customer data intake solution for B2B onboarding:

Once you decide that it's time to move to a digital customer data intake solution, the next step is to select the right platform for your needs.

When selecting a digital customer data intake solution, it is important to consider all of the features that are important to your business.

Some features to consider include:

- **The quality of UX/UI of the end product:** The platform must deliver outstanding performance in terms of UX/UI of the customer-facing interface
- **Ease of use:** The digital customer data intake solution should be easy for both the customer and the business to use.
- **The ability to collect all types of data:** The solution should allow you to easily collect all of the data that you need from your customers including text, images, attachments, signatures, etc.
- **The ability to validate data in real-time:** The solution should validate data in real-time based on custom validation rules that you create.
- **Integration with other systems:** The solution should easily integrate with your existing systems, such as CRM, ERP, and BPM.
- **Support for complex workflows:** Conditional logic and branching should be supported in order to support complex B2B onboarding workflows. This includes the ability to dynamically change the B2B onboarding process based on customer input.
- **Flexibility to change the process:** The solution should be flexible enough to support different B2B onboarding processes and to adapt to changes in your business or in regulations. It should also allow you to easily customize the process as needed. Therefore, the ability to make changes and updates quickly and easily without involving developers is extremely important.
- **Roles & Permissions:** These should also be supported to ensure that only authorized users have access to customer data along with conditional logic and branching based on user roles.
- **Integrations:** The solution should offer pre-built integrations with your internal databases and systems, such as your CRM or ERP, eliminating the need for manual data entry and touchpoints.
- **Scalability:** The solution should be able to support a large number of users and a high volume of data and be scalable so that it can grow with your business.
- **Security:** The solution should be secure, with data encrypted both in transit and at rest.
- **Compliance:** The solution should help you to comply with data privacy regulations, such as GDPR and CCPA.
- **Pricing:** The solution should be affordable and offer a pricing model that fits your budget.
- **Customer support:** The vendor should provide excellent support in case you need help with using the digital customer data intake solution.

The future of B2B onboarding

B2B onboarding is evolving and the trend is moving towards digital customer data intake solutions that are easy to use, flexible, and scalable, and pass usability testing with flying colors.

Interactive data intake UIs offer many benefits over traditional B2B onboarding methods, such as PDF-based or web forms that still require manual data entry.

Digital customer data intake solutions that offer real-time validation, the ability to collect all types of data, integration with other systems, support for complex workflows, and role-based permissions will be the future of B2B onboarding.

Digital customer data intake help B2B organizations streamline and improve their onboarding processes in multiple ways:

1

By offering real-time validation of customer data, digital customer data intake UIs reduce errors and increase accuracy.

2

By supporting complex B2B onboarding workflows, digital customer data intake UIs improve efficiency and reduce the need for manual touchpoints.

3

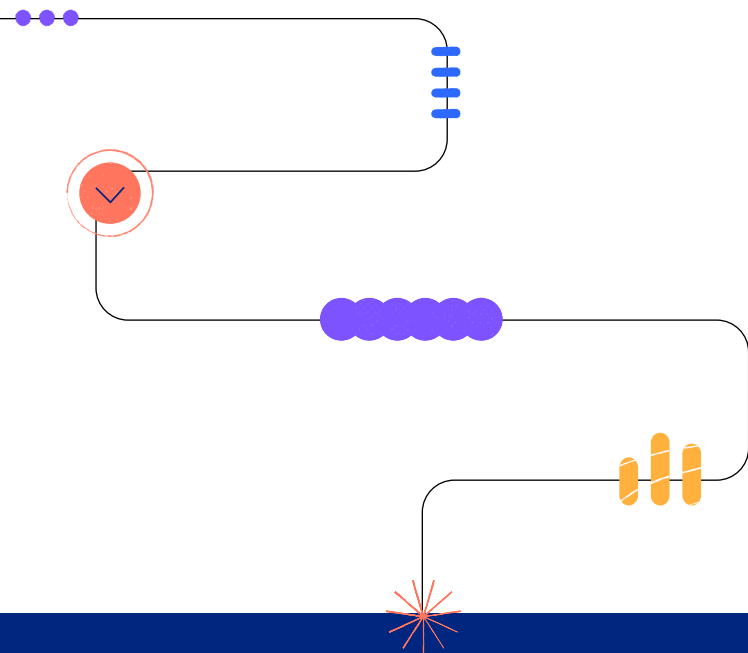
By integrating with other systems, such as CRM or ERP, digital customer data intake UIs eliminate manual data entry and duplication of effort.

4

By being scalable and able to support a large number of users, digital customer data intake UIs help B2B organizations grow without having to worry about the onboarding process.

5

By being secure and compliant with data privacy regulations, digital customer data intake UIs help B2B organizations protect their customer data.



Digital customer data intake is the future of B2B onboarding. Get started with a digital customer data intake solution today and see how it can help your organization streamline and improve the B2B onboarding process.