

opsdog

BPMN 2.0 FORMAT

BANKING

Call Center: New Accounts

The OpsDog Financial Services Hierarchy

- Banking**
 - Retail Branch Operations
 - Commercial Lending
 - Consumer Lending
 - Mortgage Banking
 - Electronic Banking
 - Wealth Management
 - Merchant & Lockbox Operations
 - Courier Services
- Back Office Operations**
 - Call Center: New Accounts**
 - Compliance & Risk Management
 - Treasury Management

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Call Center - New Accounts: Workflow

- A** Account Onboarding
- B** Online Banking Setup
- C** Other Services

Workflow Description

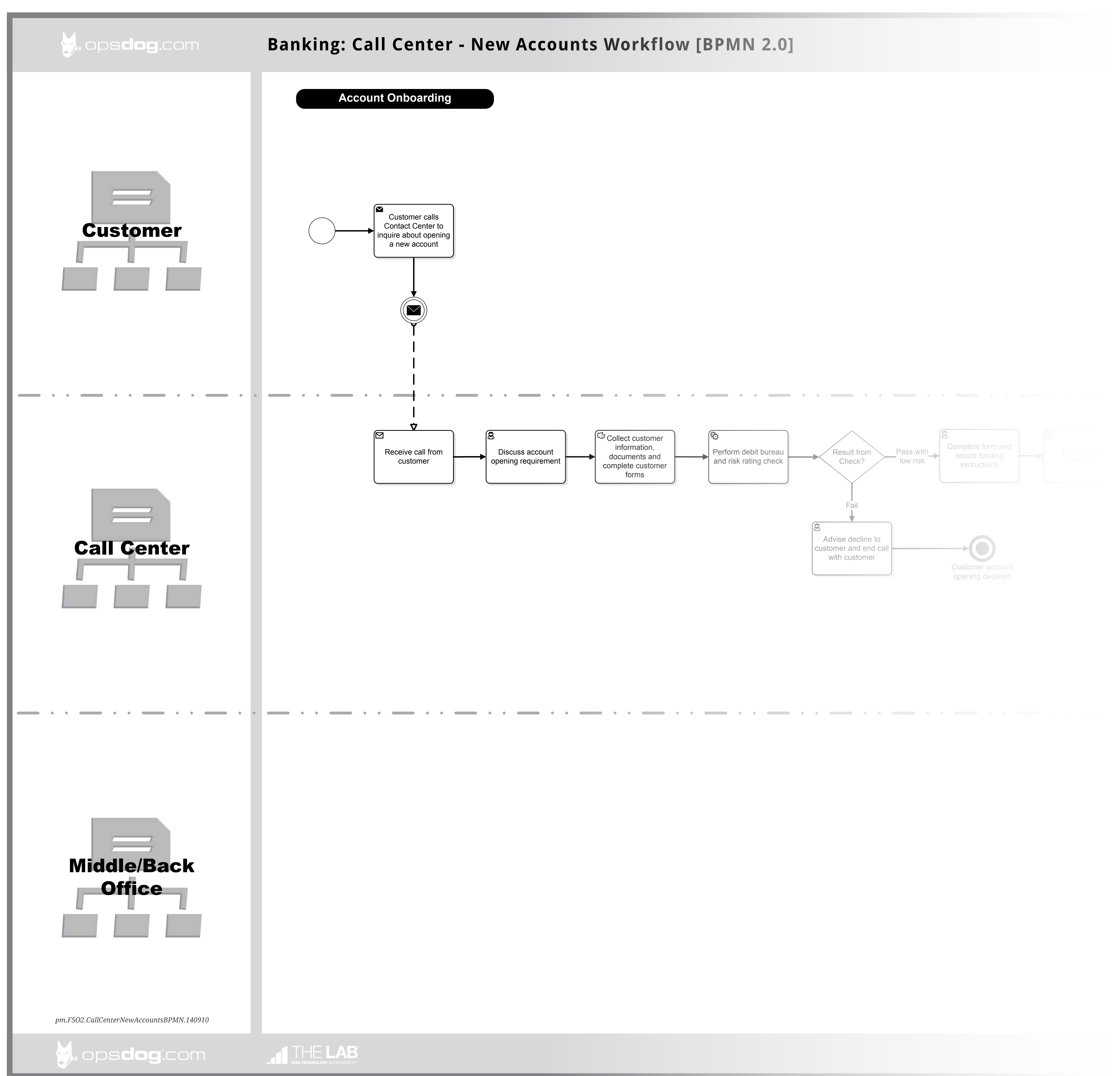
The handling and completion of new account enrollment through the call center channel. Includes customer risk assessment, bank account enrollment, and online user account setup.

Legend

- Start Event
- Intermediate Event
- End Event
- Gateway
- Group
- Task
- Expanded Sub-Process
- Pool
- Sequence Flow
- Message Flow

WORKFLOW

DO-IT-YOURSELF BUSINESS PROCESS IMPROVEMENT



Login to **OpsDog** to purchase the full workflow template (available in PDF, Visio)

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