

**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

Insurance Broker Dealer Investment/Asset Management Consumer Finance

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**Call Center - New Accounts: Workflow**

- Account Onboarding
- Online Banking Setup
- Other Services

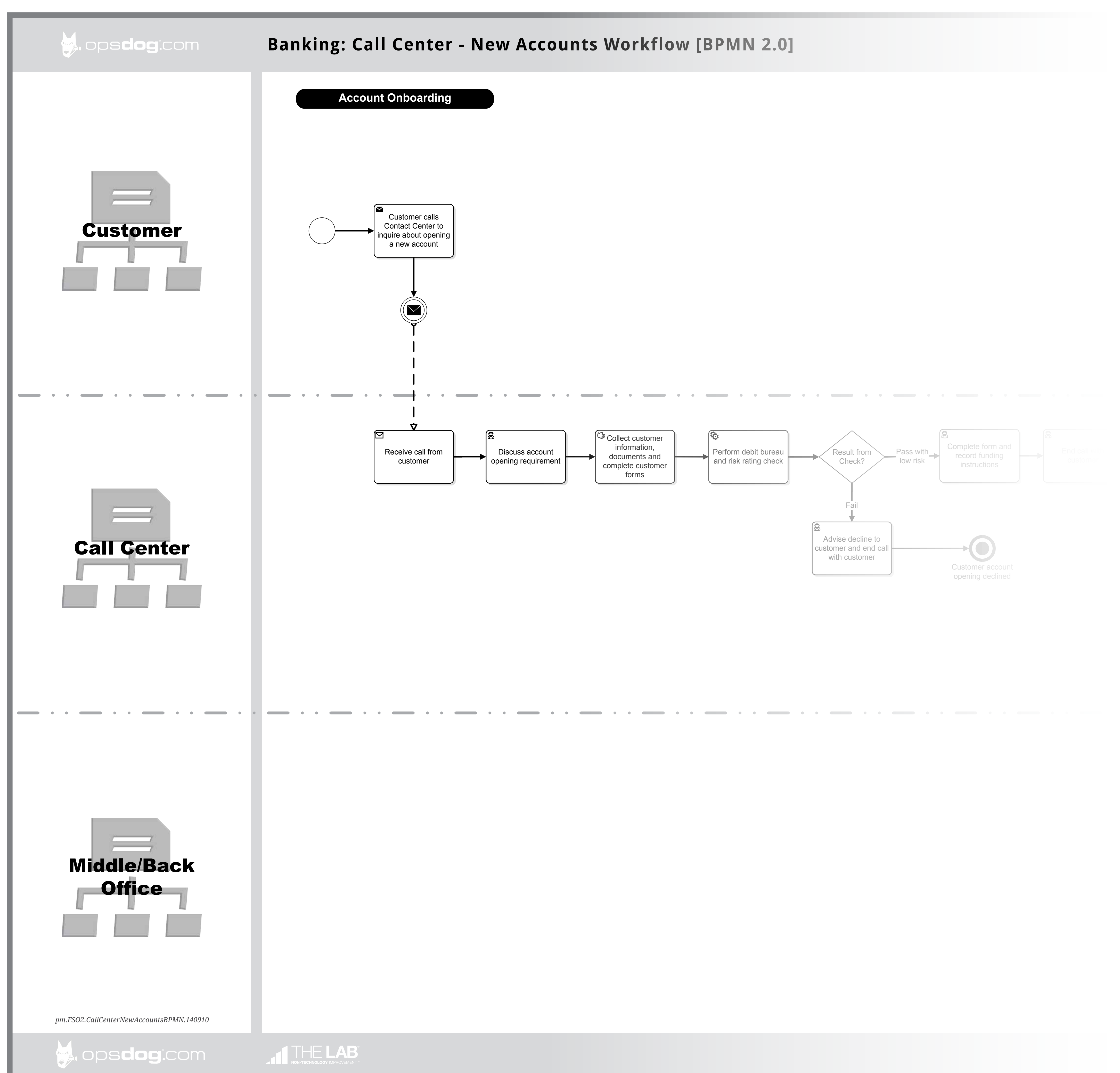
**Workflow Description**

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

DO-IT-YOURSELF BUSINESS PROCESS IMPROVEMENT



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

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