

opsdog

BPMN 2.0 FORMAT

BANKING

Commercial Client Services

The OpsDog Financial Services Hierarchy

- Banking
 - Retail Branch Operations
 - Commercial Lending
 - Consumer Lending
 - Mortgage Banking
 - Electronic Banking
 - Wealth Management**
 - Commercial Client Services**
 - Merchant & Lockbox Operations
 - Courier Services
 - Back Office Operations
 - Treasury Management
- Insurance
 - Broker Dealer
 - Investment/Asset Management
 - Consumer Finance

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Commercial Client Services: Workflow

- A Maintenance Requests
- B Maintenance Processing

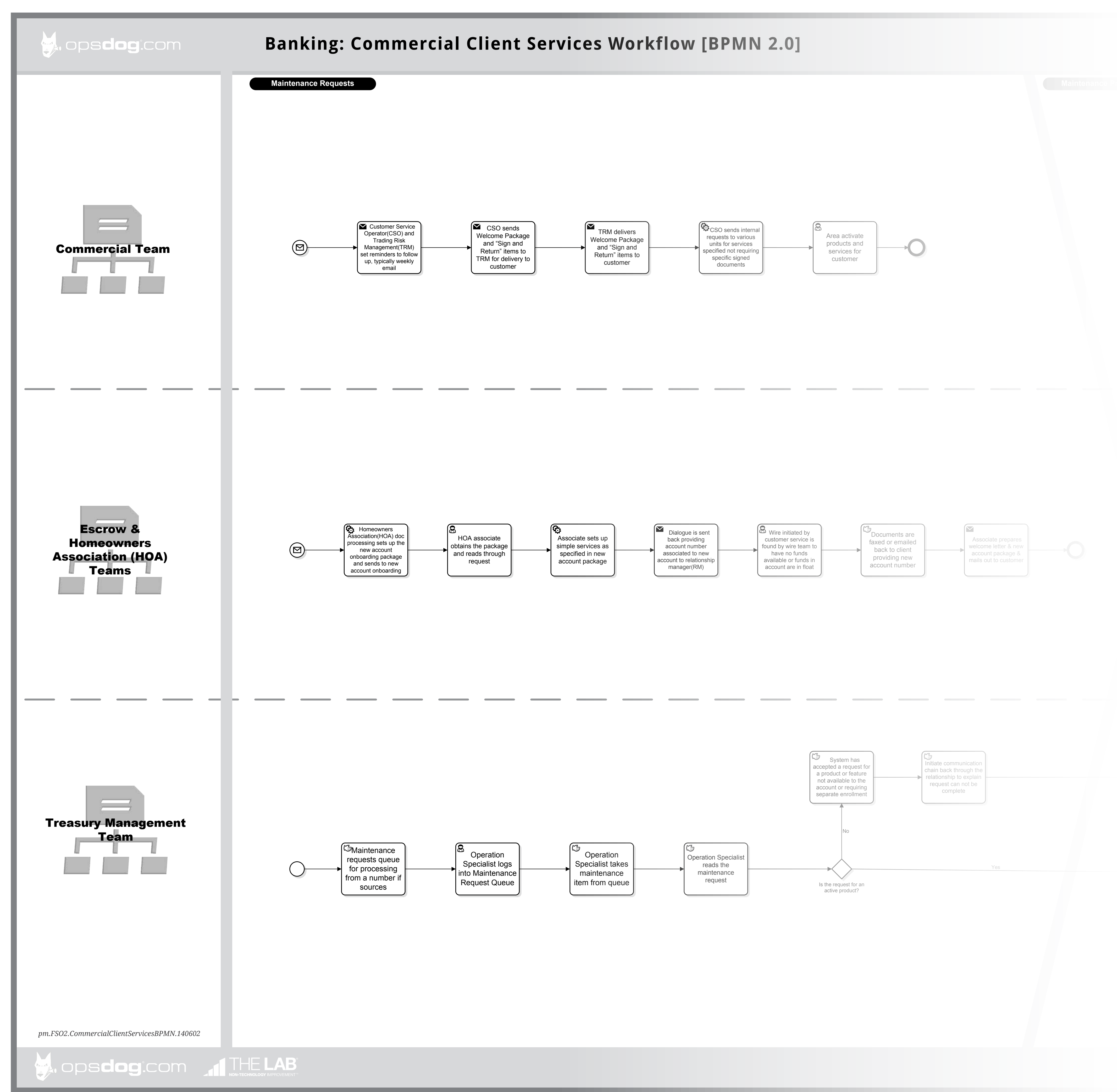
Workflow Description

Maintenance of commercial client accounts is rendered by several functional groups with little interaction between them. The Commercial Team sends out renewal notices and welcome packages, tracks documents and performs account actions. The Treasury Management Team fields maintenance requests and performs actions or explains to the client why a request cannot be performed.

Legend

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

DO-IT-YOURSELF BUSINESS PROCESS IMPROVEMENT



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