



# The future of digital onboarding

for U.S. Bank clients

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*U.S. Bank Global Treasury Management*

# Today's presenters

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# Our method and approach



## Waterfall

- Longer process to deliver
- Limited opportunity for enhancements

## Agile

- Accelerated time to market
- Iterative collaboration with our clients

# An agile approach to digital onboarding

Address friction points in the client journey for implementation

Our platform is central point for client interaction

We'll deliver in layers of sophistication from good to great

Put clients in the drivers seat to use solution and keep improving





# Isn't there an easier way?

## Challenge:

Too many documents and too much paper to manage

## Friction point:

Cumbersome to submit scanned documents via secure email

## Solution:

Document Xchange: electronically receive and send documents



# I don't know my implementation status



## Challenge:

What's going on with account openings or implementations?

## Friction point:

Status updates require calls and emails

## Solution:

Onboarding Tracker 1.0: view onboarding progress online

# I know my status, how do I take it forward?

## Challenge:

How do I fix implementation challenges without having to call?

## Friction point:

I can see the issues online in the system but I can't act on them

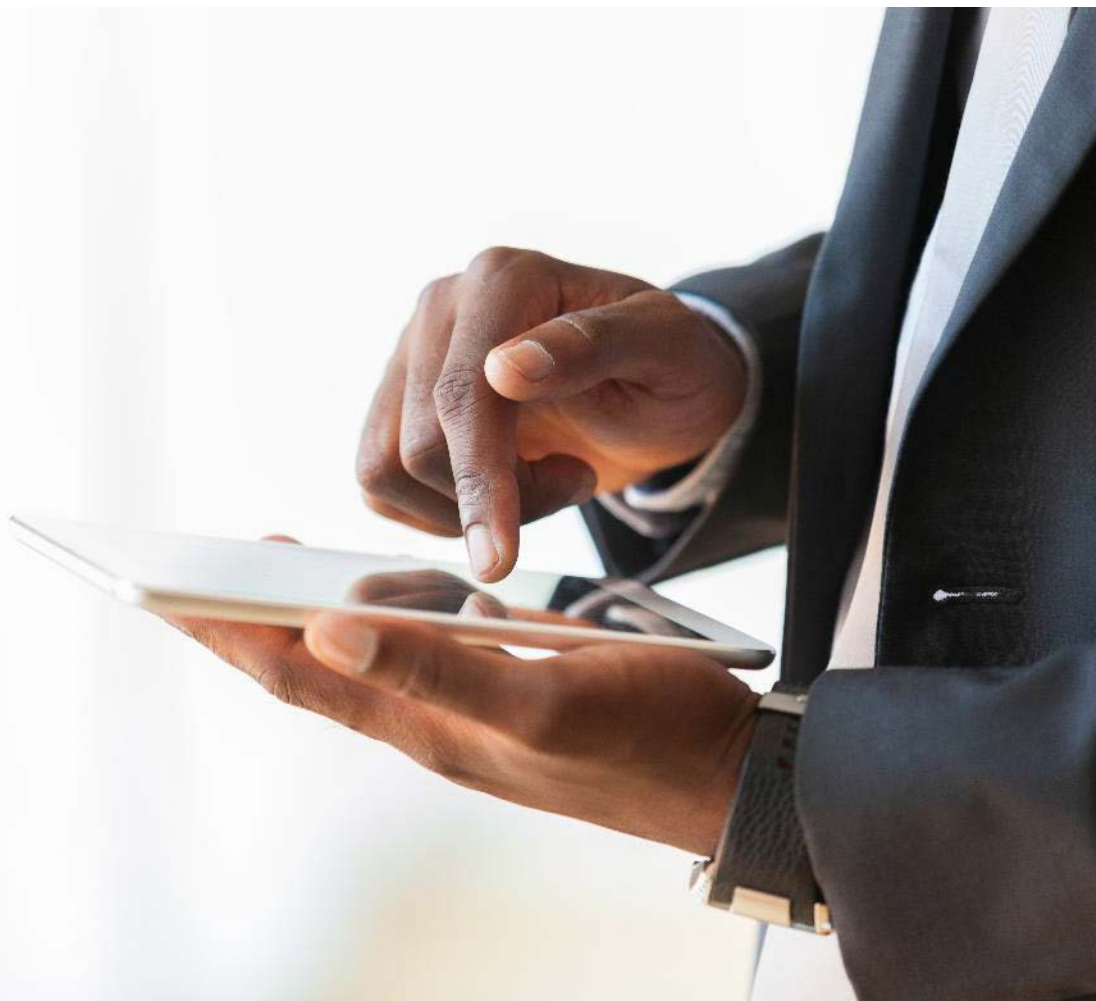
## Solution:

Onboarding Tracker 2.0: delivered message board and file exchange capability





# I want paper free digital onboarding



## Challenge:

How can we simplify onboarding using online options?

## Friction point:

Wet signatures are time consuming and not effective

## Solution:

eOnboarding: input required data and use electronic signatures

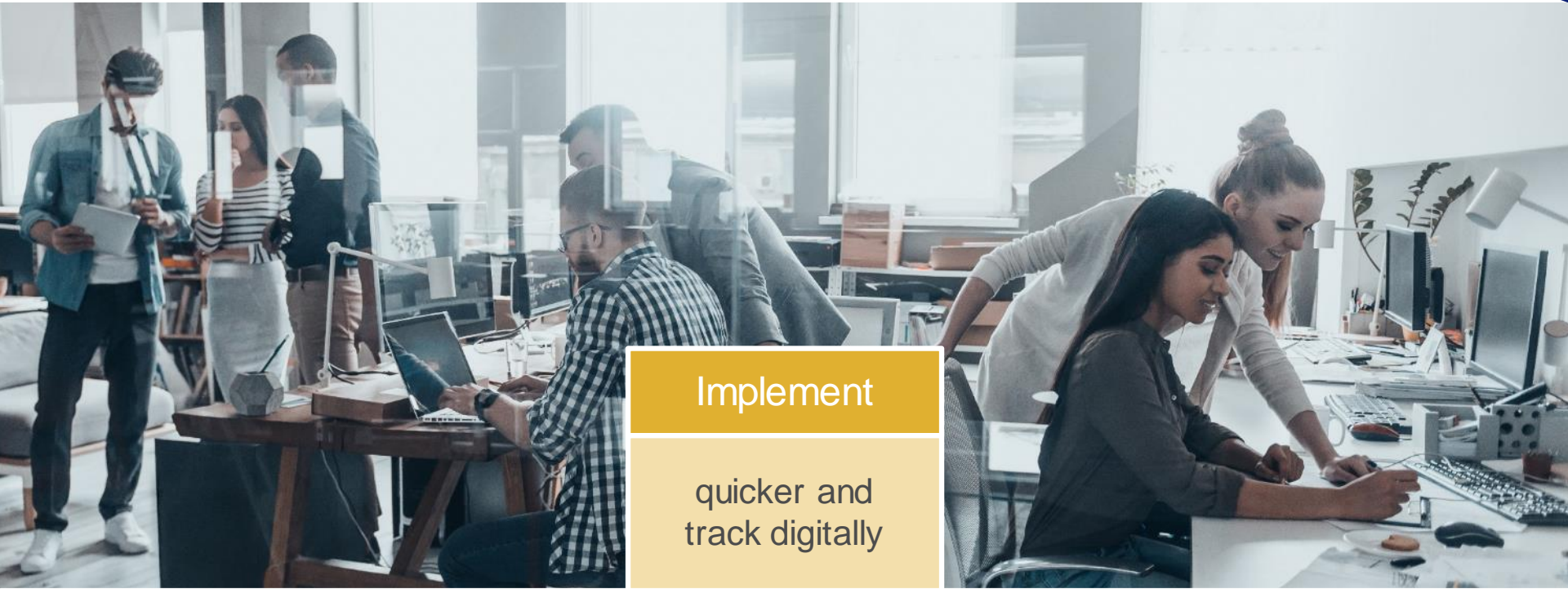


# Innovation vision aligned to your treasury journey



Evaluate & buy	Connect	Implement	Transact	Optimize
solutions tailored to your needs	easily and seamlessly	quicker and track digitally	faster and in more ways	using data and industry trends

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quicker and track digitally

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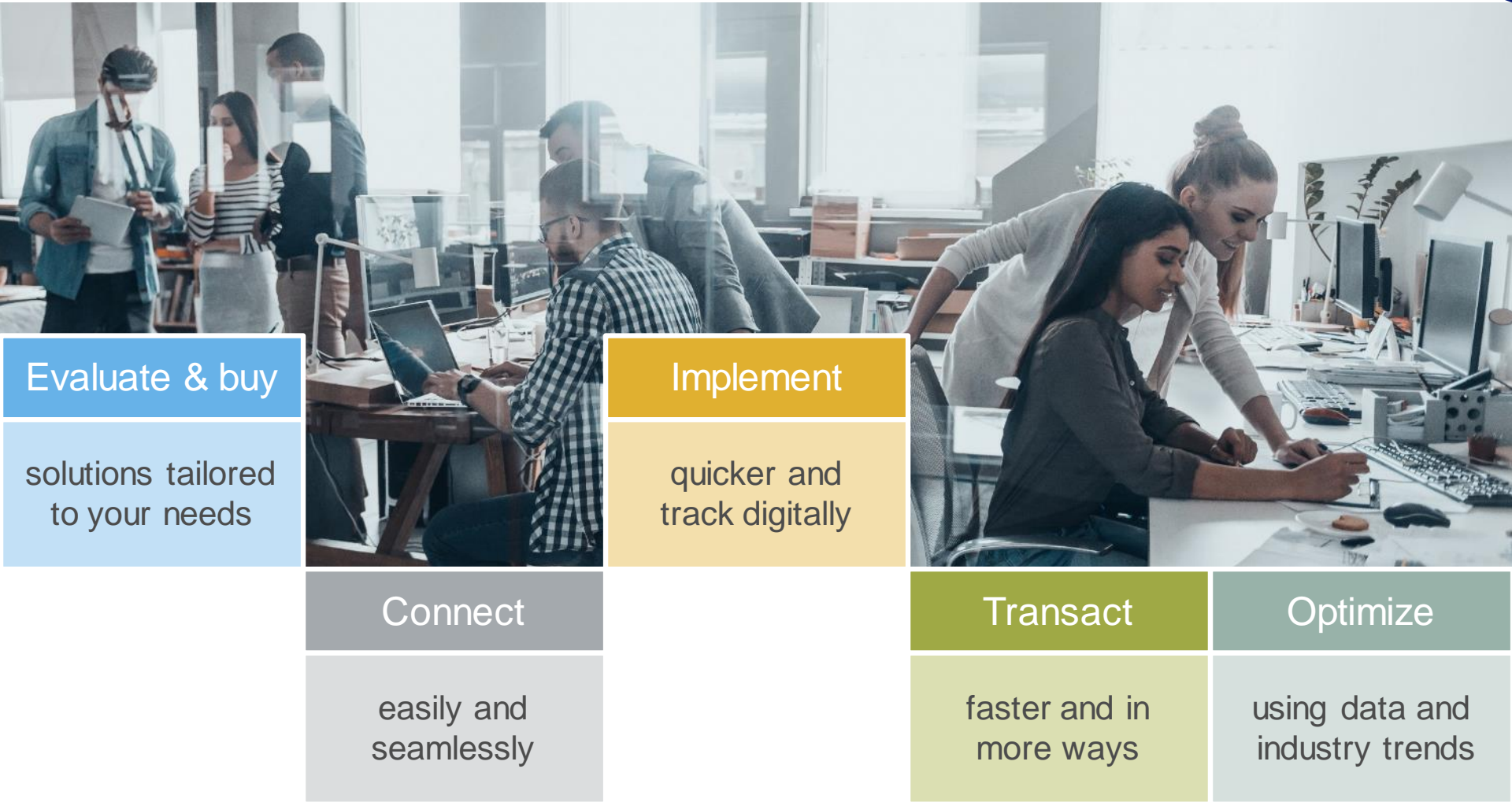
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# Join us for next month's webinar



## AP automation—solve payment challenges with an invoice-to-pay solution

Thursday, September 17, 2020  
11 a.m. PT, noon MT  
1 p.m. CT, 2 p.m. ET

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