

Xceptor Client Lifecycle Management

Boost efficiency with end-to-end client lifecycle automation

The hidden cost of fragmented client management

Financial institutions struggle with disconnected systems and manual processes across the client lifecycle:



Missed opportunities

Poor coordination results in delayed revenue generation.



Frustrated clients

Slow and clunky onboarding leaves clients dissatisfied.



Multiple teams

Manual handoffs between teams cause delays and increase the risk of errors.



Lack of visibility

Inadequate oversight across client touchpoints leads to an inability to determine where in the lifecycle the client is.



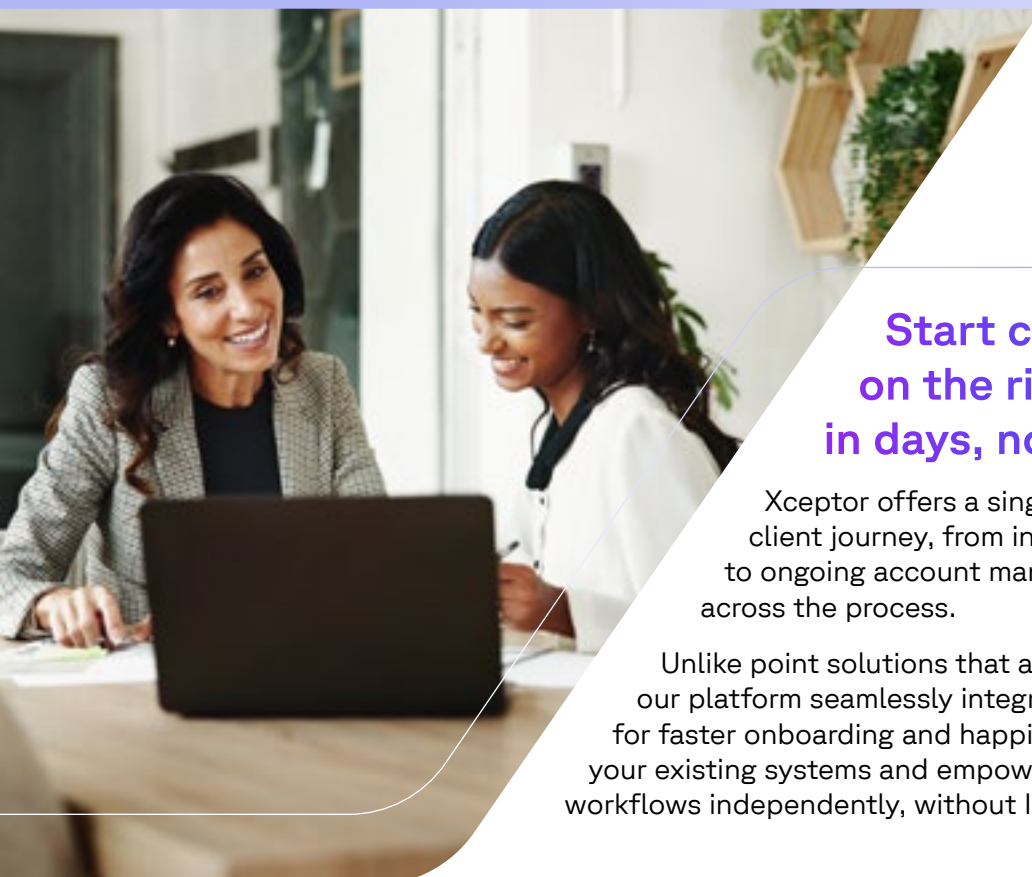
Unable to manage compliance lifecycle milestones

Relying on people to each out to clients to ensure documentation is completed/renewed leads to missed deadlines.



Data silos

Multiple systems create barriers between relationship management, onboarding, and account servicing.

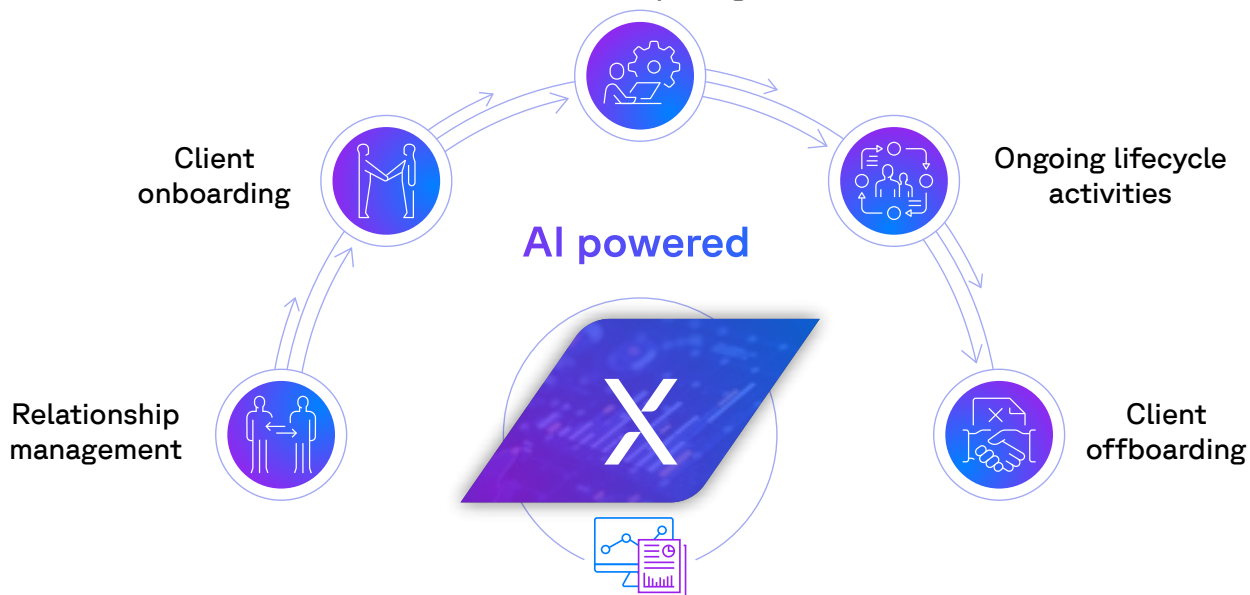


Start client relationships on the right foot – in days, not weeks

Xceptor offers a single platform to manage your entire client journey, from initial request through onboarding to ongoing account management – with real-time visibility across the process.

Unlike point solutions that address only specific stages, our platform seamlessly integrates all client lifecycle processes for faster onboarding and happier clients. It connects with your existing systems and empowers business users to configure workflows independently, without IT dependency.

Account opening



Management Information (MI) and reporting



Streamline relationship management



Capture client intent and validate requests from the start.

- Capture and validate requests across channels
- Pre-fill forms and eliminate rekeying
- Provide instant feedback on submissions
- Automate due diligence and initial risk checks
- Track SLAs and trigger automated escalations

Accelerate client onboarding



Coordinate and automate onboarding tasks across teams, products, and markets.

- Centralize onboarding tasks into digital workflows
- Route validated data to KYC, legal, and credit systems
- Automate document generation and distribution
- Support onboarding across multiple products and markets in parallel
- Provide real-time visibility and audit-ready records

Automate account opening



Accelerate time-to-trade by automating downstream setup.

- Integrate with internal systems to push client data
- Automate account creation and reference data setup
- Link all account setup activities to the original client request
- Track SLA compliance and notify teams of issues

Manage ongoing lifecycle activities



Stay compliant and responsive with automated monitoring and updates.

- Trigger periodic reviews, renewals, and regulatory updates
- Track deadlines and compliance via dashboards
- Use client data to proactively recommend additional services

Standardize offboarding



Ensure structured and compliant client exits.

- Automate offboarding workflows and updates to internal systems
- Archive documentation and maintain audit trails
- Ensure all closure tasks are tracked and completed



Future-proof your operations with Xceptor's flexible data automation platform



We turned to Xceptor as it gave the best fit of the qualities we needed – genuine automation and flexibility for the business users. We recognized that not only would it be a cost effective way to automate managing our new clients, but it could be applied to our existing customers too.

We also saw great potential for Xceptor to be used for other data problems in our organization and Xceptor has indeed proved very valuable for our operations team.

Head of Operations
Maitland



Improve client experience while accelerating time to revenue

Our clients have transformed their onboarding journey into a fast, transparent, and accurate process while reducing manual effort.



Rapid onboarding

From 6 weeks
to 6 days



Increased efficiency

50% reduction in
account opening times



Greater productivity

Increased volume
of account requests
processed



Enhanced governance

Standardized processes
with improved oversight
to support compliance

Leave manual processing
in the past and streamline
your client lifecycle
process today



[Learn more](#)

[Contact us](#)

Xceptor