

Streamlining Client Onboarding with AI & Automation

How a clunky, manual handover process evolved into a faster, more reliable workflow.



1 The problem

After client kick-off meetings, the handover to the operations team used to be manual, time-consuming, and prone to information loss.



Notes had to be written manually after meetings



Important details could be missed or lost



Links and transcripts had to be found and shared manually



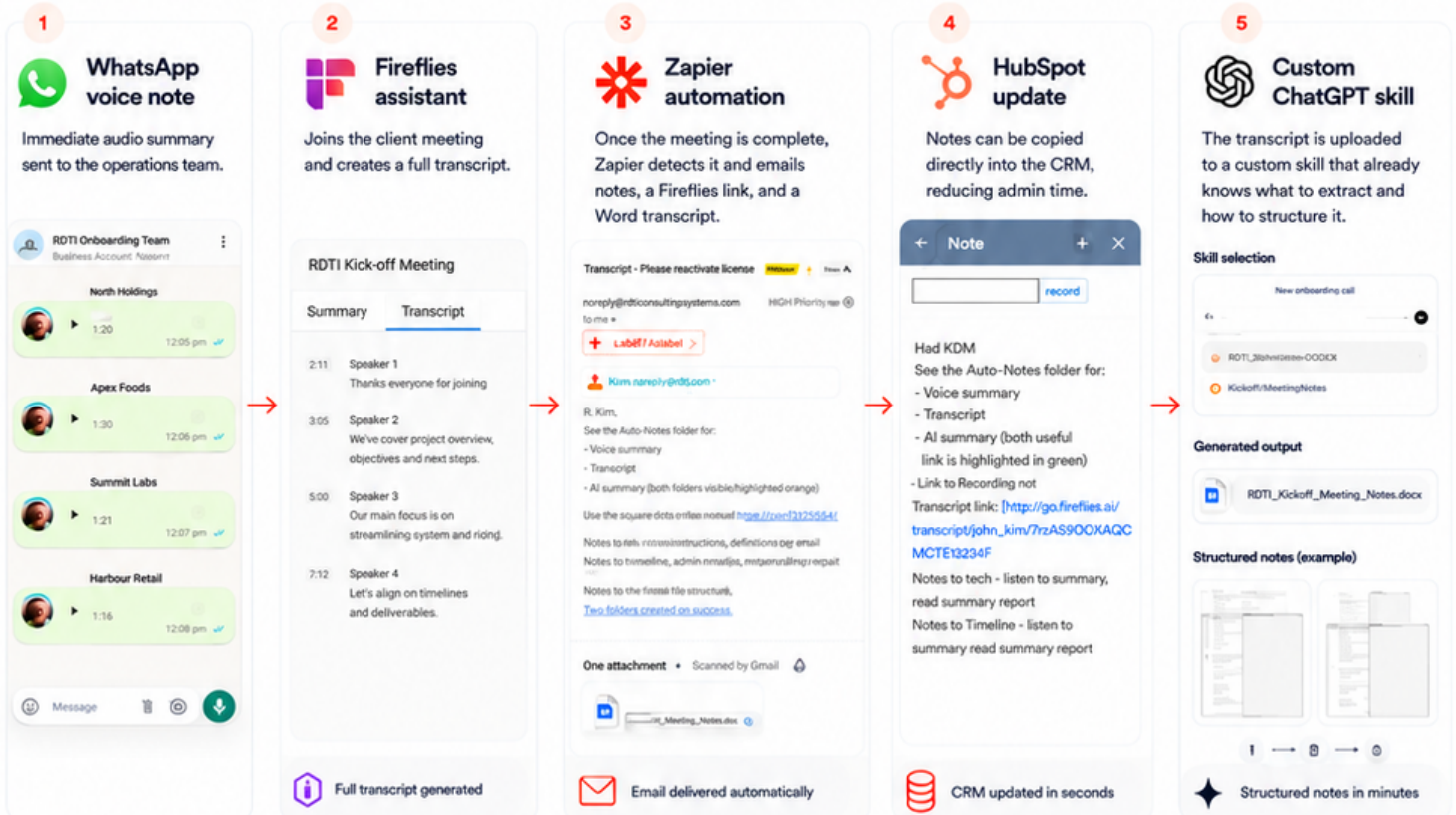
CRM updates were repetitive and time-consuming



The operations team could not realistically read full transcripts

“ The issue wasn’t the meeting. It was the manual work that followed. ”

2 The evolution of the process



By improving the workflow step by step, **AI and automation** transformed a fragmented handover into a connected process.



Less manual work



Fewer misses



Faster, reliable handovers