

MYRMETICS

TECHNOLOGY. TALENT. TRUST.

CASE STUDY · BFSI

Onboarding in Three Days

A banking group rebuilds client onboarding and service operations on Dynamics 365 Customer Engagement.

9 → 3	+31%	100%	6 mo
Days to onboard	First-contact resolution	Audit evidence	To first release

Context

Onboarding spanned five teams and three systems, with compliance evidence assembled manually at audit time. Service agents worked from queues they could not prioritise.

Approach

- Single onboarding journey on Customer Engagement with staged compliance checks.
- Automated evidence capture against every regulatory control.
- Agent workspace consolidation with skills-based routing.
- Model-driven reporting replacing four spreadsheet trackers.

Outcome

Measure	Before	After
Client onboarding	9 days	3 days
First-contact resolution	Baseline	+31%
Audit evidence assembly	3 weeks	On demand
Manual trackers	4	0

“Compliance stopped being an event. The evidence is a by-product of the process now.”

**Ask about regulated-industry delivery patterns —
connect@myrmetics.com**