

**eCOS:
INTELLIGENT
ONBOARDING
IN MINUTES**

ONBOARDING MADE EASY

eCOS is a market leading electronic client onboarding solution (eCOS) that allows you and your clients to connect and share information instantly and securely.

Delivering a simplified onboarding process for you and a modern experience for your client, it replaces inefficient and outdated steps with a faster, digital process.

eCOS brings the current fragmented and often time-consuming process of collating essential 'Know Your Client' information, form filling and verification checks into a single journey on a platform inspired by the very people who use it.

eCOS provides undeniable time saving while satisfying essential due diligence steps, such as:



verifying identities and funds






completing Law Society Protocol forms and onboarding questionnaires



signing and returning client care documents

GET STARTED IN 3 SIMPLE STEPS

-  Launch from your **browser** or **Case Management System**, simply select the items your client needs to complete.
-  In just four clicks, attach client care documents through our unique **file importer**.
-  Send the secure link inviting your client to a **first-class onboarding experience** they'll want to tell their friends about.

eCOS FEATURES AND BENEFITS...

One secure platform for all your onboarding needs

Highly efficient and transparent process reducing hours of managing multiple systems and outdated paper based processes.

Accessible on any device

Allows your clients to complete essential steps on the go, from anywhere and at any time.

Verification of identity and funds within one dynamic workflow

The most accurate client verification tool supported by 300 million identities verified worldwide. Over 3,500 ID documents in more than 200 countries and trusted by leading brands including Metro Bank, HSBC, Monzo, Barclays, Nationwide and more.



Dedicated support team not just for you, but your clients too.

Law Society Protocol forms with SmartForm verification technology enabled

One place for official Law Society forms and onboarding questionnaires for undeniable time saving and an exceptional client experience.

- TA6 (Property Information)
- TA10 (Fittings & Contents)
- TA7 (Leasehold Form)

Built around GDPR and 'Know Your Client' requirements

Protects your firm and your clients while supporting a paperless onboarding solution.

...FOR INTEGRATED CUSTOMERS

Fully integrated with leading case management systems

All results are returned directly to your CMS, providing a robust compliance process for every transaction.

Integration with Perfect Portal, supports client updates through your firm's client app

Enables you to keep your clients updated every step of the way with consistent brand messaging.



Capture data from web forms and quoting for integrated Perfect Portal customers

eCOS' integration with Perfect Portal completes the full data eco-system for a single source of truth.

SmartForms with data are automatically mapped directly from your case management system

Saves rekeying time and reduces the risk of errors.

WHY eCOS IS RIGHT FOR YOU

eCOS combines the industry's complex due diligence needs with today's consumer expectations to create onboarding for the digital age. With an easy-to-use dashboard that enables you to get an instant and complete view of onboarding progress, you can be confident you are creating the most efficient onboarding experience.

eCOS can reduce client onboarding by almost an hour per case, and in some instances, fully completed in just 20 minutes!



EFFICIENCY STARTS WITH ONBOARDING.

Paper based onboarding is a thing of the past. Fulfil today's consumer expectations whilst saving hours in admin with eCOS from Search Acumen. It's onboarding with acumen.

www.search-acumen.co.uk

Get in touch

support@search-acumen.co.uk

0800 240 47 46