IBM Cloud Pak for Business Automation Demos and Labs 2025

End to End Demo for Cloud Pak for Business Automation using Client Onboarding Scenario – AI-feature enabled version –

Warning: This version of the Client Onboarding lab guide only works in environments that have various CP4BA AI-features configured.
For other environments a separate lab guide is available.

v1.0.2 (for CP4BA 25.0.0)

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1 Introduction

This lab is based on the use case of a simplified version of a **Client Onboarding solution** as part of **Focus Corp.'s service business**. Although intended to be realistic, it is fictitious, simplified and is meant to showcase key aspects of the Cloud Pak for Business Automation in an easy and quick way.
This scenario highlights selected business functions and technical integration points across the Cloud Pak for Business Automation. It showcases how combining these platform capabilities including generative AI can be used to build a powerful end-to-end business solution that helps to digitize all aspects of business operations.
This lab focuses on the business user experience executing a client onboarding from start to finish, not developing the solution itself.

1.1 Cloud Pak for Business Automation

IBM Cloud Pak for Business Automation is a set of integrated market-leading software, running on top of Red Hat OpenShift designed to help you solve your toughest operational challenges. It can be deployed on-premises, on the cloud, or in a hybrid way.
With built-in generative AI capabilities, analytics to measure impact, and business-friendly low-code tooling, IBM Cloud Pak for Business Automation helps customers to significantly reduce the amount of time spent on manual processes. Specialized business automation capabilities — for content, decisions, RPA, workflows, and document processing — are built on top of powerful automation services. Using the process mining and operational intelligence capability, you can get insights into how your processes run, visualize issues, pinpoint fixes, and prioritize actions.
A single business automation capability may contain multiple products. For example, Document processing encompasses IBM Datacap and IBM Automation Document Processing and Decision management encompasses IBM Operational Decision Manager and IBM Automation Decision Services.
IBM Robotic Process Automation while shown as part of Automation Foundation is directly featured in the Cloud Pak for Business Automation. While the server part of IBM Robotic Process Automation is containerized, and can therefore run on OpenShift, it is one of the few capabilities that requires Windows. Both for the authoring environment and for executing the bots.
The products are integrated in many ways. Automation Services and an Automation Service catalog, APIs and reusable UI libraries are the core ones. Currently Workflow and Automation Decision Services from the Decision capability can publish automation services while Automation Application Designer and Workflow can consume automation services. Automation services allow discovery and usage of services within the Cloud Pak without the need to consider technical aspects like offering product, protocols, authentication/authorization etc. This makes them especially suitable to no-code consumption through business users.

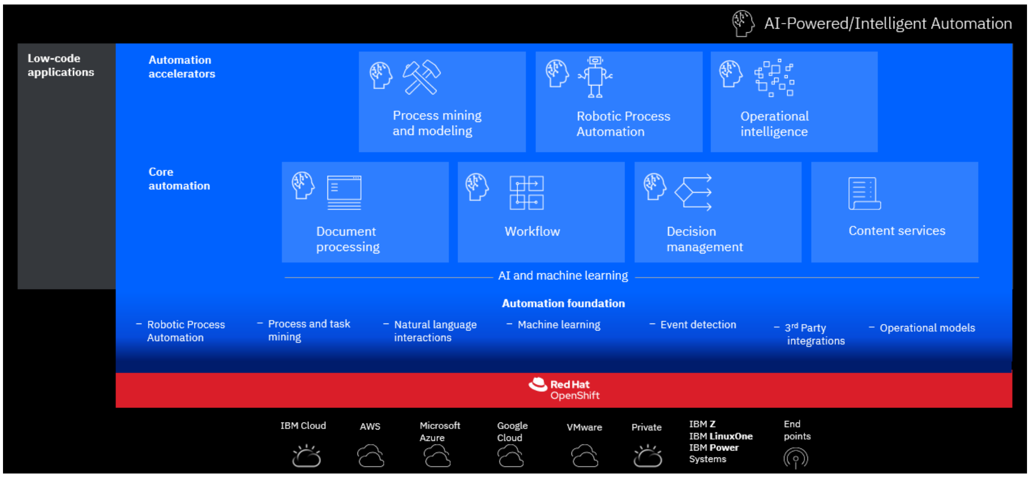


Figure 1: Marchitecture of the IBM Cloud Pak for Business Automation

1.2 Business Scenario

The overall Client Onboarding solution consists of a multi-page front-office intake app and a workflow that orchestrates all back-office activities (both automatic and system ones) to either onboard the client or reject their onboarding request.

The client representative initially works with the Client Onboarding app. This app has been created by the business using the low-code IBM Automation Application Designer. It leverages services created by IT in the other capabilities of the platform.

When a client calls, the client representative collects all required information about the client and the services the client wants to subscribe to, before they submit the onboarding request to the back-office part of the solution. While the app can be used by multiple client representatives at the same time, each of them completes their own onboarding request independently.

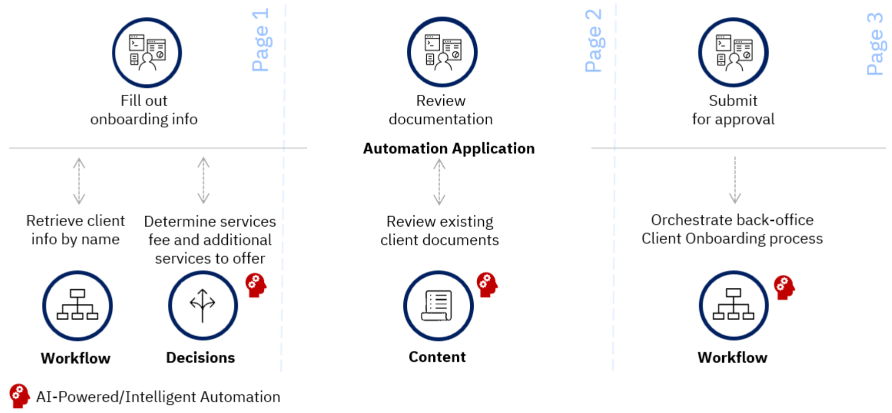


Figure 2: High-Level Client Onboarding Application Architecture

Figure 2 in the upper half gives a high-level overview of the three pages of the intake app designed using IBM Automation Application Designer and the purpose of the pages. The lower half depicts how the pages interact with other capabilities of the Cloud Pak for Business Automation to fulfil their purposes.

1. On the first page, the client representative can manually enter all client onboarding information or look up the information for an existing client. For the lookup the Automation Application calls out to Workflow. Additionally, once services to be onboarded have been selected, the fee for these services and potential upsell services are determined by calling out to Decisions.

   The red icon indicates that this place utilizes AI-Powered/Intelligent Automation with prescriptive rules and potentially predictive ML models that may be hosted externally.
2. On the second page, the client representative can review the documents that are already available for the client and change the status for those required for the onboarding request. For this the app uses Content capabilities.

   To make work easier for the client representative, IBM Content Assistant is embedded in this step (indicated by the red icon). The client representative can trigger the automatic analysis of all available documents to identify and select the ones required for the request.
3. On the third page, a message is displayed that confirms the successful submission of the onboarding request and includes a reference ID that is associated to that request. The submission of the onboarding request triggers the back-office workflow in Workflow.

   As will be outlined in more detail below, AI-Powered/Intelligent Automation capabilities are also leveraged as part of the workflow solution in the back-office.

Depending on various factors, the back-office workflow using the Workflow capability may involve the client, an account manager, and/or the client representative.

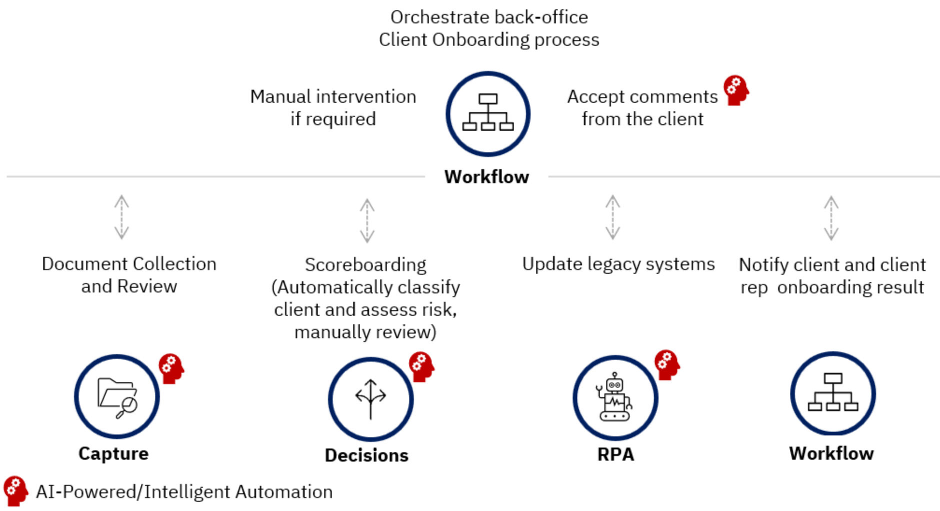


Figure 3: High-Level Client Onboarding Back-Office Solution Architecture

Figure 3 depicts that Workflow orchestrates various activities, both human-driven knowledge work and system activities, to perform the actual client onboarding in the back-office. The Case capability in Workflow is specifically suited as it supports semi-structured use cases. The red icon symbolizes again where AI-Powered/Intelligent Automation capabilities are applied. These are built into the respective capability or can be provided by a potentially externally hosted AI model. Depending on the circumstances of the onboarding request one or multiple of the activities are executed or skipped. These activities are grouped into four stages:

1. The activities performed in the **Document Review** stage depend on the availability or non-availability of documents required for the onboarding request. If all documents are available and they have all been verified by the client representative, no activity is required, and the stage is automatically completed. If documents are missing the client receives an email with information about what documents are missing including a link to a web page to upload them. Once a document is received the Capture capability is triggered to determine the type of document and to extract the required data. IBM Automation Document Processing with its advanced AI-infused features is used for this purpose. If the extracted data is as expected the Workflow proceeds to the next stage. If not, the client receives another email with the details giving them the opportunity to upload additional documents.
2. The first activity in the **Scoreboarding** stage uses rules and machine learning models from Decisions to categorize the client into a segment 1 or segment 2 client (using prescriptive rules), determines if the onboarding request is a low or high-risk request, and returns a confidence score (both based on using a predictive model). If the confidence is equal or higher than 80%, the decision to accept (low risk) or reject (high risk) the client onboarding request is performed automatically.

   When the scoreboarding confidence is lower than 80%, a second activity is assigned to an account manager who must manually assess the onboarding request through a task in Workflow. In case an annual report is available for the client the account manager is supported by IBM Content Assistant. They can open the annual report via a quick link and ask specific questions to Content Assistant to help with their decision.
3. The third stage **Backend Systems Update** consists of an activity to update two legacy system of records of Focus Corp. As these systems don't have APIs available, an IBM Robotic Process Automation (RPA) bot is utilized.

4. In the fourth and final stage, **Notification**, the client representative is informed of the onboarding result for the onboarding request they have initiated using a task in Workflow which completes the onboarding request.

Orthogonal to these four activities, while the onboarding request is active, the client can send comments using Focus Corp's website. These are analyzed by a large language model (LLM), to determine the urgency, tone, summary, and optionally provide a translation, if the original message was not in English. The information is also used to flag those onboarding requests that require special attention.

Throughout the stages of the workflow the client is also notified about status changes and activities needed to be performed by them through email.

1.3 Lab Setup Instructions

1. Access the document that lists the available systems and URLs along with login instructions. For this lab, you will need to access the **Client Onboarding Desktop** and the **Business Performance Center**.
2. Download the files **Old Utility Bill - Legacy Consulting.pdf** and **Current Utility Bill - Legacy Consulting.pdf** from the **Lab Data** folder of the lab onto your computer. The files will later be uploaded as part of the first exercise which is to onboard Legacy Consulting.

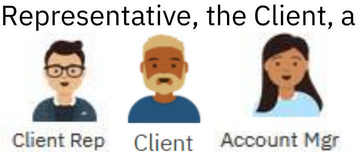
2 Exercise: Onboarding a Client with Low Confidence Level (Manual Intervention)

2.1 Introduction

In this exercise, Legacy Consulting wants to subscribe to two services from Focus Corp.'s healthcare services.
You will first take the role of the client representative, a Focus Corp. employee, who is on the phone with Legacy Consulting for this request. Initially, you collect all the required information. As part of that you will notice that a utility bill is not on file for Legacy Consulting. It is required to validate the client address. You will submit the onboarding request after letting the client know that they will receive an email with upload instructions for the pending document.
Because of the missing utility bill, you will switch into the role of the client to upload it. You will experience that uploading a utility bill with an outdated address will fail the validation resulting in an additional email letting you know that fact. Uploading a more recent utility bill will pass the validation and progress the internal processing of your onboarding request.
With all documents being present and having been validated, a scoreboarding activity will classify Legacy Consulting as a Segment 2 client with a high-risk profile and an assessment confidence of less than 80%. Under these circumstances, the request cannot be handled automatically and will require manual handling by an account manager. The client is notified about this via email.
Different from what was promised, Focus Corp does not get back to you within 2-3 business days. After a week you, in your role as a client, are adding message to your onboarding request, to express your unhappiness and expedite a response.
At this point you will take over the role of the account manager to manually review the request. You notice the escalation message from Legacy Consulting and immediately start to review the request. Reviewing the available data, you notice that an detailed annual report is available for this client. Instead of spending a lot of time reading through the full report, you ask IBM Content Assistant for a summary considering your task.
Despite positive indications you consider the default risk as too high and will reject the onboarding request. The client will be informed via email as will be the client representative via a notification task as they initiated the onboarded request.
This path through the onboarding scenario exemplifies that often for complex, high value, high risk decisions or those where a machine generated decision has low confidence, knowledge workers need to get involved and need to make the final decision. The decision made by a human can then be used to further train the machine learning model so for future cases even more automation is possible.
In addition, this path also highlights how sensible use of generative AI can help to boost the productivity of employees.

2.2 Exercise Instructions

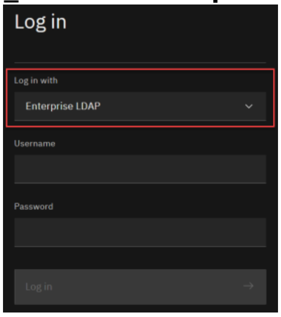
You will use the same user to perform all tasks even when assuming the different roles of Client Representative, Client, and Account Manager. To remind you which role you currently perform, most screens show an icon and label in the top right corner. In this flow the ones for the Client Representative, the Client, and the Account Manager.



2.2.1 Taking the call from Legacy Consulting and collecting base information

_1. Navigate to the **Client Onboarding Desktop** using the link provided.

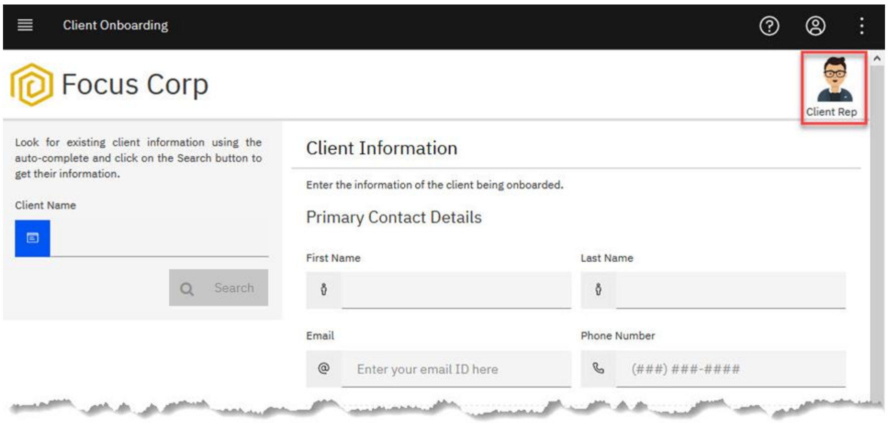
_2. **Select Enterprise LDAP** from the dropdown on the Log in page.



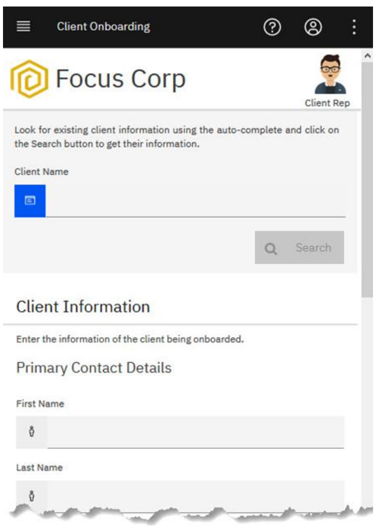
_3. **Login** with the username and password that has been assigned to you.

_4. As the **Client Representative** (see icon in the top right corner) **explore** the first page of the Client Onboarding app.

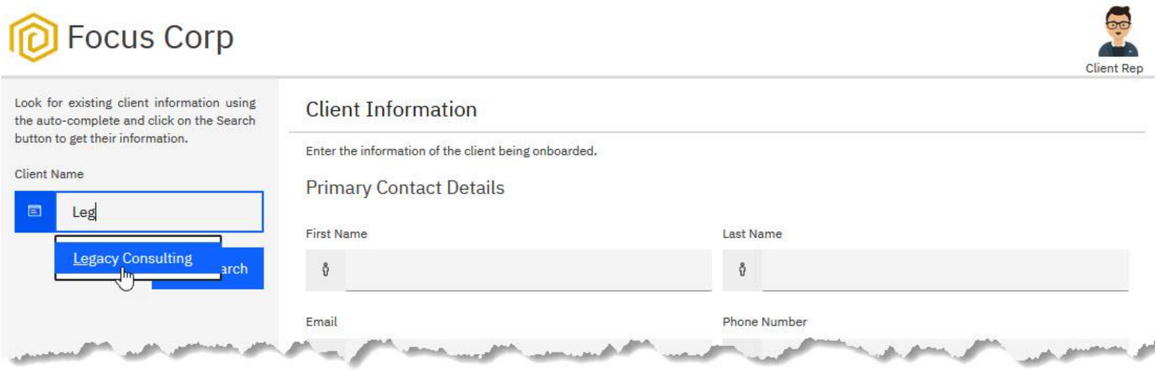
It provides means to search for an existing client by name, enter various information about the client, a selector for the industry for which Focus Corp. offers services, a list of services the client can sign up for, and the ability to calculate the services fee and upsell recommendations based on the selection.



When you resize the browser window you will observe that the page is responsive. That means that a single app can be designed that it can easily be used on a large screen like a desktop/laptop, on a tablet, or even mobile phones.

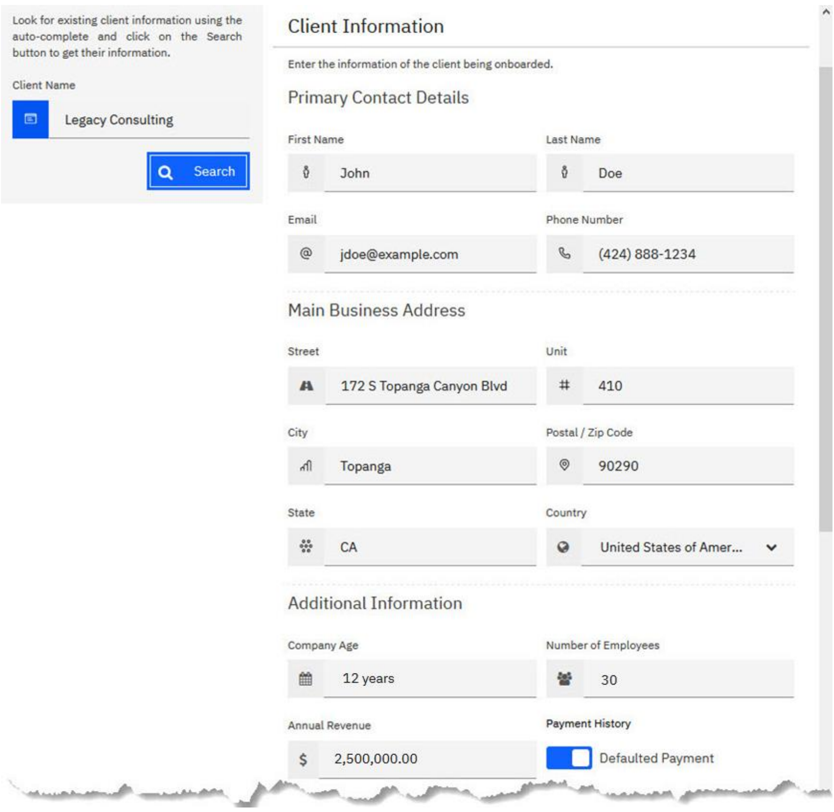


_5. **Type *Leg*** in the **Client Name** field in the left panel to search for **Legacy Consulting** which is an existing client of Focus Corp.

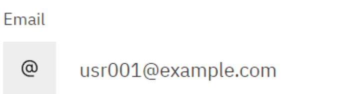


_6. **Click** on **Legacy Consulting** once the type-ahead feature offers it.

_7. **Click** on **Search** to load the details for the client. It retrieves the client details using integration with the Workflow capability.
Observe that the Search button becomes active once you entered something in the text field and leave it or select the proposed entry from the pop-up window.



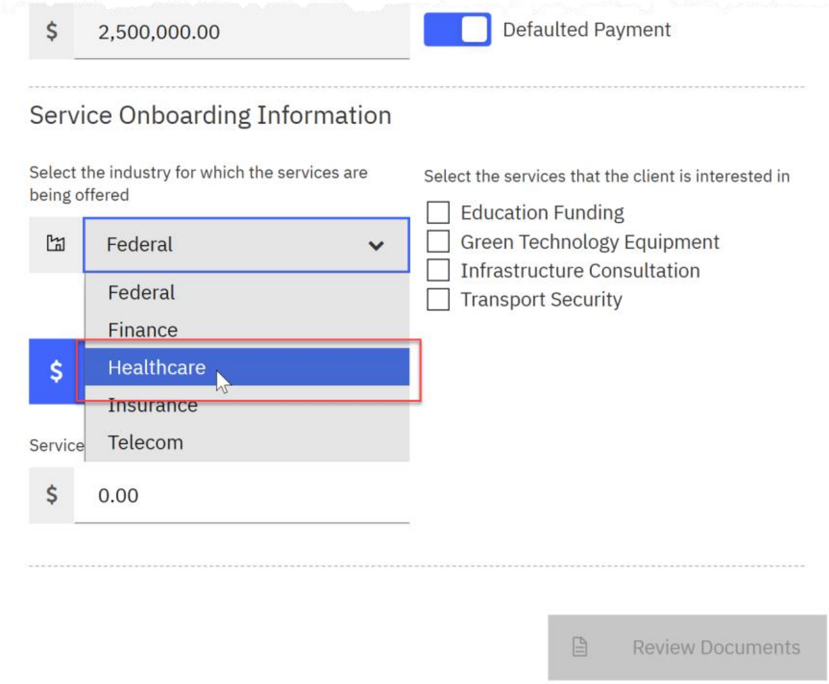
_8. The **Email** field is pre-populated with the local email address of your user and is read-only.



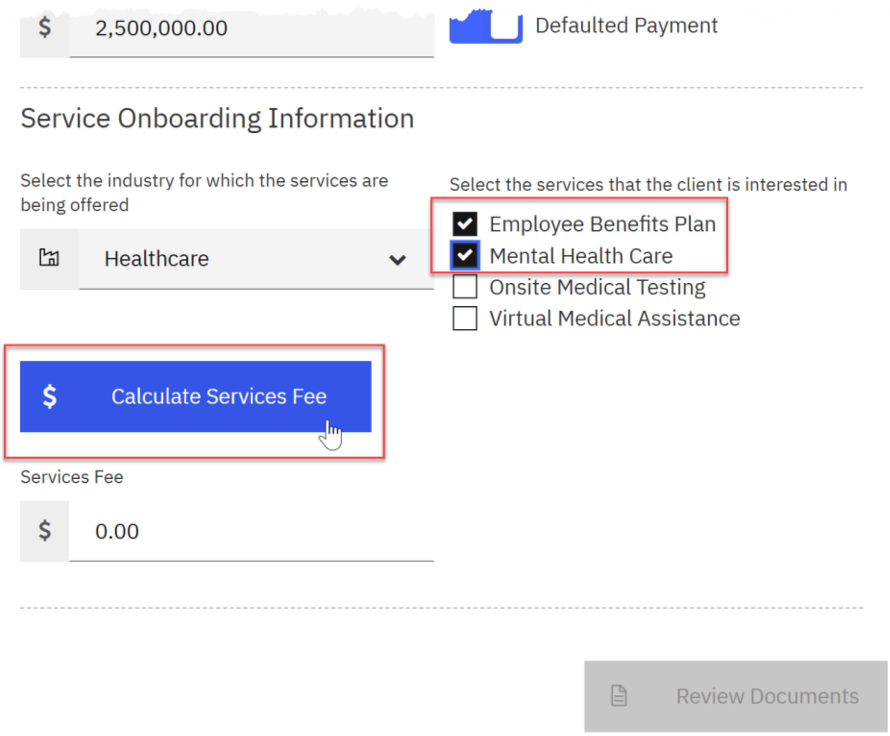
> In case the environment you are using is configured to use an external email server, **optionally replace** the **Email** with an email address of your choice that you can use to receive client emails associated with the scenario.

_9. **Select Healthcare** in the **Industry** drop-down list as Legacy Consulting requests to onboard to two services in that domain.

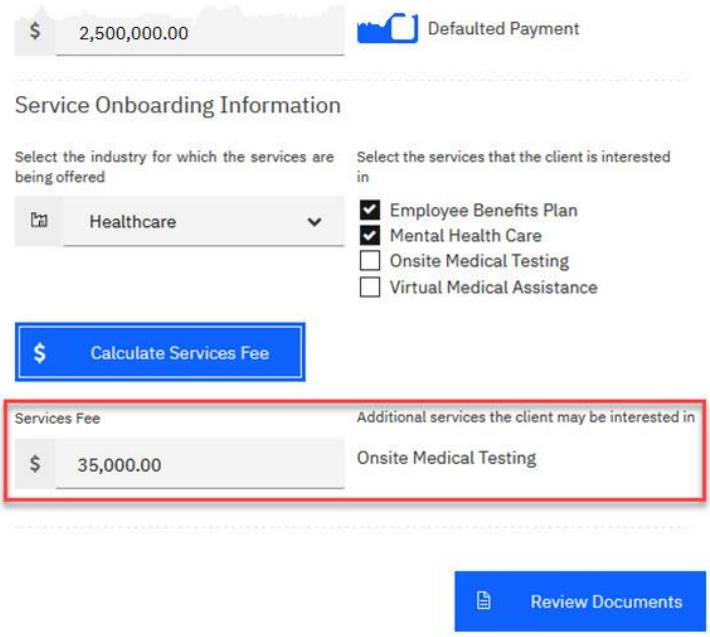
Selecting an entry from the drop-down dynamically changes the options in the services to onboard.



_10. **Check Employee Benefits Plan** and **Mental Health Care** as the services that Legacy Consulting wants to onboard to.

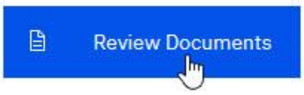


_11. **Click Calculate Services Fee** to calculate the fees and get upsell recommendations. Having the client information fields filled and the services fee calculated enables the Review Documents button at the bottom.



> The fees are calculated by an external service pricing engine build using prescriptive rules. The additional services that the client representative could offer as upsell opportunity to the client are currently also based on prescriptive rules but could also be generated based on a machine learning model.

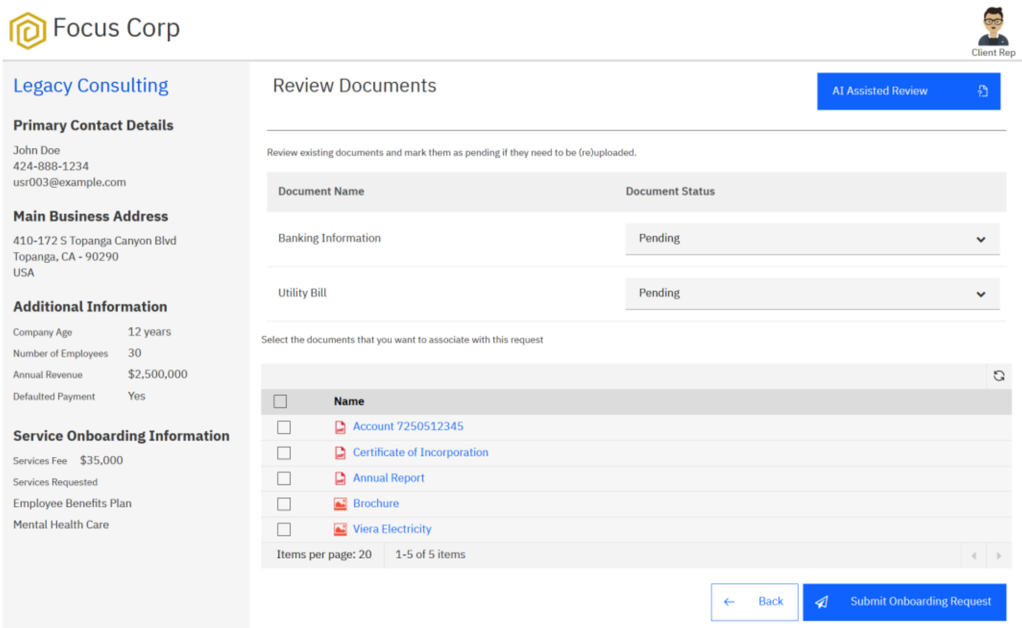
_12. **Click Review Documents** to navigate to the next page.



2.2.2 Verifying required documents and submitting the onboarding request

_13. **Explore** the second page of the Client Onboarding app.

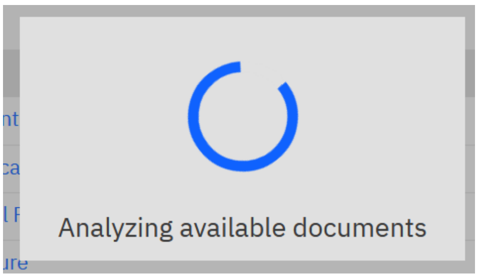
The left pane lists all information provided on the previous page. In the right pane, all documents that may be relevant to this onboarding request are listed with their individual status of either Pending (Default), Verified, or Not Required. At the bottom a list of all potentially relevant documents Focus Corp. already has for Legacy Consulting is shown.



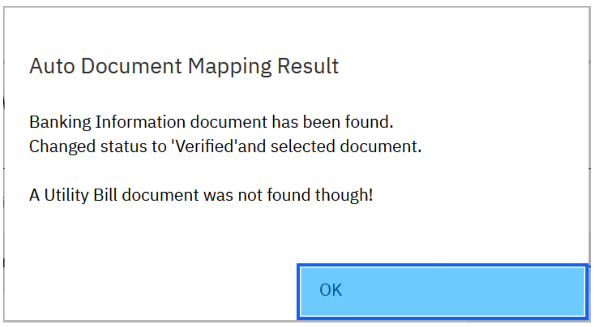
_14. **Click** on the **AI Assisted Review** button to simplify your task to identify which of the documents are available and to include them in the request.

The AI Assisted Review button uses IBM Content Assistant to classify all documents visible at the bottom into being of type Banking Information, Utility Bill, or something else.

Classifying the documents takes some time (up to a minute, please be patient) during which a popup is shown.

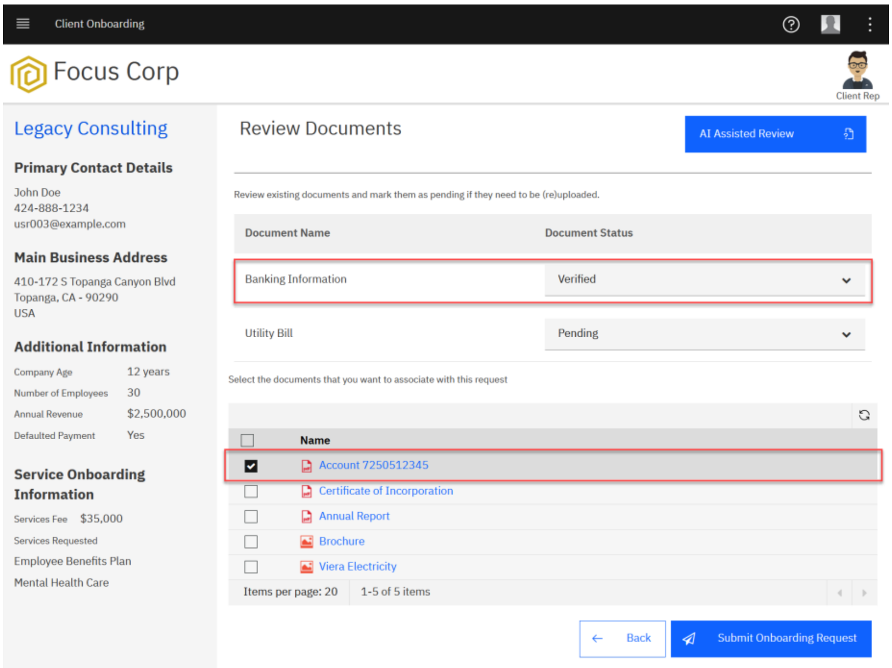


Once the analysis is completed, another popup summarizes the result.



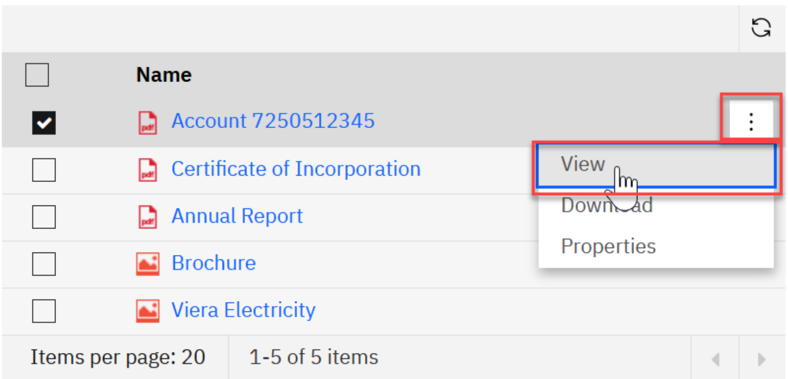
In case of Legacy Consulting only a Banking Information document (named Account 7250512345) was found, but no Utility Bill document.

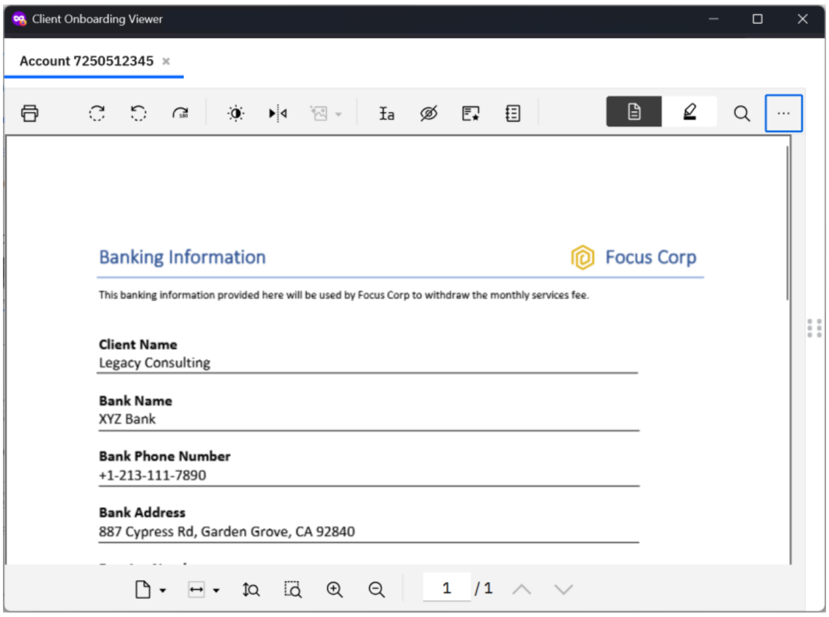
Based on this analysis result, the first dropdown is automatically changed to Verified and the respective document is being checked for inclusion into the request.



> While classifying the documents using IBM Content Assistant takes some time, the client rep does not need to open and review each document manually, saving them a lot of time. This especially applies for many (unclassified) documents and/or documents don't have prescriptive names.

_15. Optionally **View** the **Account 7250512345** document by **clicking** the **three dots** at the right end of the row that appear when you hover over the line and **select View**. This opens the document in the integrated viewer. You can confirm that this is a Banking Information document. Afterwards **close** the viewer **window** again.





> Focus Corp. recently made a change in their business policy to require a utility bill to verify the client's address. As we don't have one for Legacy Consulting, Legacy Consulting will need to upload one after the client representative has completed their onboarding request.

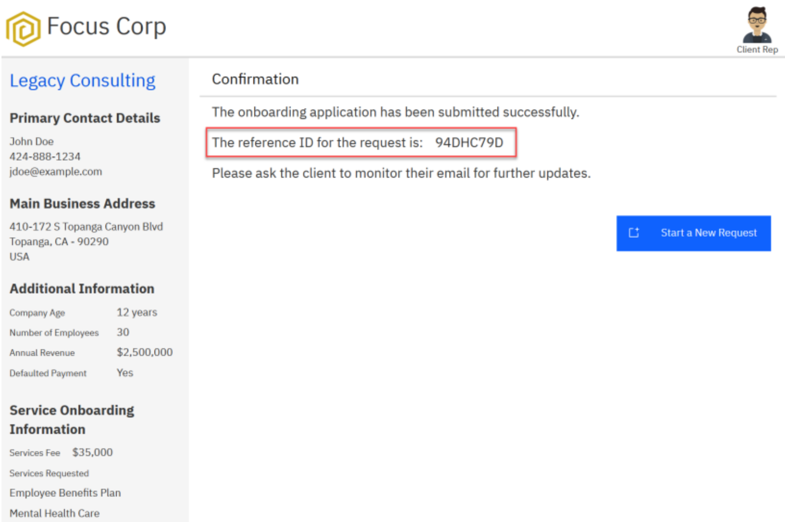
_16. **Click Submit Onboarding Request** to complete Legacy Consulting's request and navigate to the final confirmation page.

> The submission may take a few seconds during which you might notice a little spinner icon next to the Client Rep icon. Please wait until you are taken to the third page.

2.2.3 Onboarding request confirmation page

_17. **Explore** the third page of the Client Onboarding app.

The left pane again lists all information provided on the first page. The right-hand side provides a reference ID for the request that the client representative can share with the client and a comment that an email was sent to the client about their request.



_18. **Note down** the **Reference ID** for future reference.

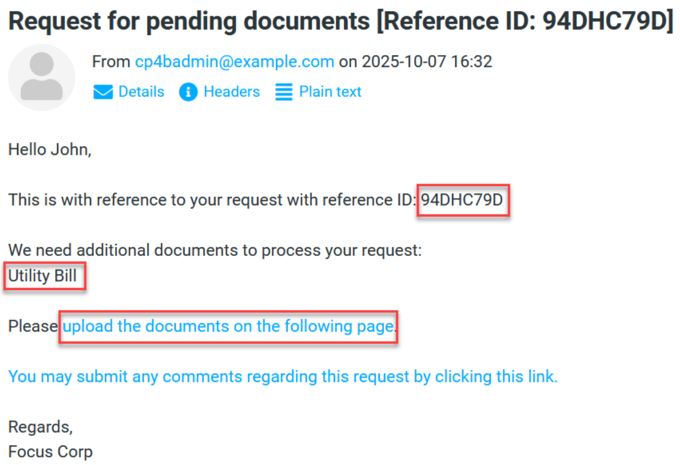
_19. **Click** on **Start a New Request** to get back to the first page so you will be able to onboard the next client in the next exercise.

2.2.4 Checking the automatic email & uploading a Utility Bill

_20. Open the email client in a browser using the URL provided to you.

> If you specified your own email address on the first page, **open or bring your email client to the front.**

_21. **Check** your inbox for an email (the sender depends on the configuration of the environment you are using).



The email contains the reference ID as displayed on the final page of the Client Onboarding app. It lets you know that the Utility Bill is required to further process your onboarding request. It contains a link for you to get to a web page to upload the document. The link takes you to an application built using

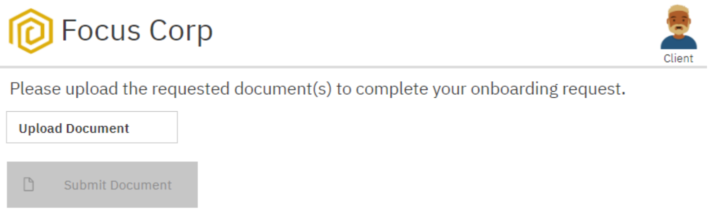
Business Automation Application and this application requires no authentication as public access is enabled for it.

_22. **Click** on the **link** in the email to open the upload page.

_23. **Explore** Focus Corp.'s Client Document Upload page.

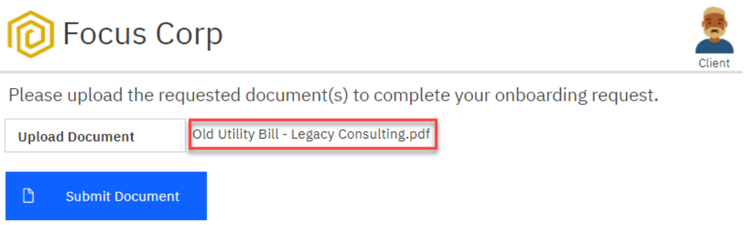
The icon in the top right shows that you are still in the role of the client. The page is simple to use, providing only a control to select a file to upload and a submit button that becomes active once a document is selected.

> You don't have to provide your reference id manually as it is included in the URL and will be automatically sent to the server.



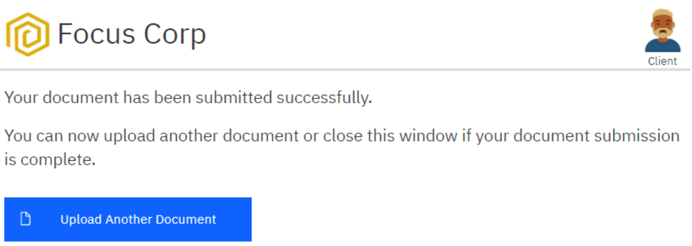
_24. **Click** on the **Upload Document** control and select **Old Utility Bill - Legacy Consulting.pdf** from the location where you downloaded the documents to before.

> This utility bill contains an old address of Legacy Consulting which does not match the address the client representative captured in the onboarding request.



_25. **Click** the **Submit Document** button to upload the document to the server.

_26. After a short moment you will see a confirmation page that lets you know that the file was successfully uploaded.



_27. **Close** the Client Document Upload browser tab.

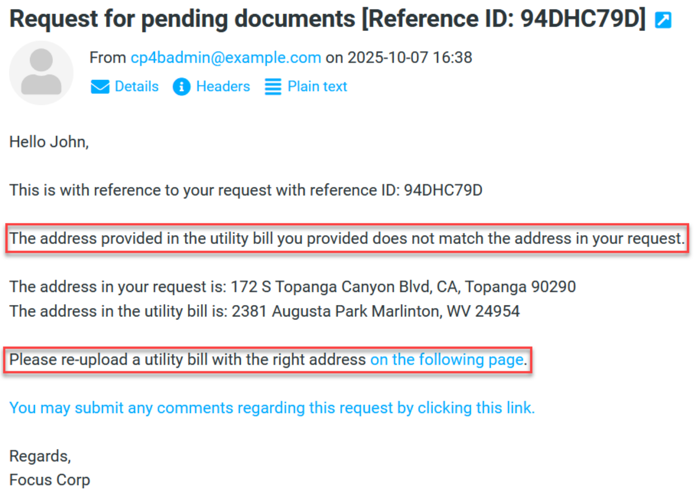
2.2.5 Checking the automatic email to & uploading a second Utility Bill

_28. Open the email client in a browser using the URL provided to you.

> If you specified your own email address on the first page, **open or bring your email client to the front**.

_29. **Check** your inbox for another email (the sender depends on the configuration of the environment you are using).

> If it has not arrived yet, give it a moment as the uploaded document may still be processed.

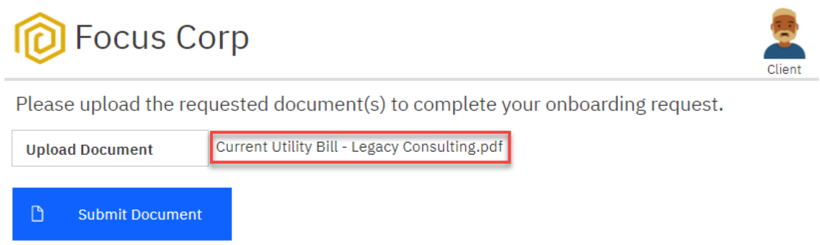


The email again contains the reference ID as displayed on the final page of the Client Onboarding app. It lets you know that the address in the Utility Bill that you have uploaded does not match the address as stored in the onboarding request. It contains a link for you to get back to the Client Document Upload web page to re-upload a utility bill with the correct address on it.

_30. **Click** on the **link** in the email to open the upload page again.

_31. **Click** on the **Upload Document** control and this time select **Current Utility Bill - Legacy Consulting.pdf** from the location where you downloaded the documents to before.

> This utility bill contains the address of Legacy Consulting which matches the address the client representative captured.



_32. **Click** the **Submit Document** button to upload the document to the server.

_33. You will again see a confirmation page that lets you know that the file was successfully uploaded.

_34. **Close** the Client Document Upload browser tab again.

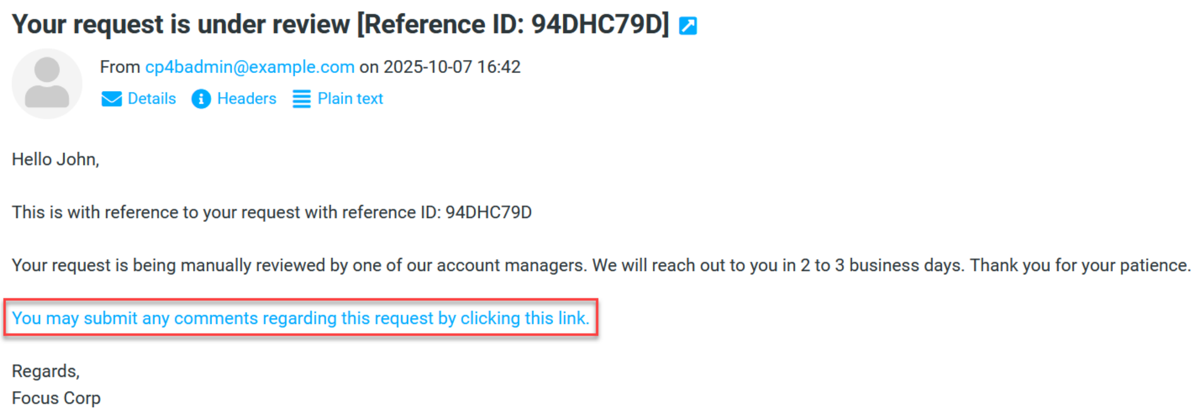
2.2.1 Checking the automatic email about manual review and posting a comment

_35. Open the email client in a browser using the URL provided to you.

> If you specified your own email address on the first page, **open or bring your email client to the front**.

_36. **Check** your inbox for a third email (the sender depends on the configuration of the environment you are using).

> If it has not arrived yet, give it a moment as the uploaded document may still be processed.



The email again contains the reference ID as displayed on the final page of the Client Onboarding app. It lets you know that your onboarding request is being handled manually by an account manager and that you can expect a result within 2-3 business days.

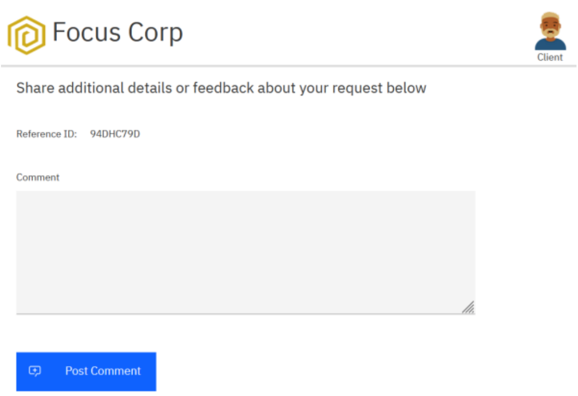
> You may have noticed that this email and the previous ones also contain a link that allows you to submit comments to your onboarding request. We will make use of that now.
> After having waited for about 2 weeks, you are running out of patience as you quickly need the services for your business. You will let Focus Corp know that you are very unhappy and require an immediate response.

_37. **Click** on the **link** in the email to open the comments submission page.

_38. **Explore** Focus Corp.'s comments submission page.

The icon in the top right shows that you are still in the role of the client. The page is simple to use, providing only a text area to put your comment into and a submit button.

> You don't have to provide your reference id manually as it is included in the URL and will be automatically sent to the server.



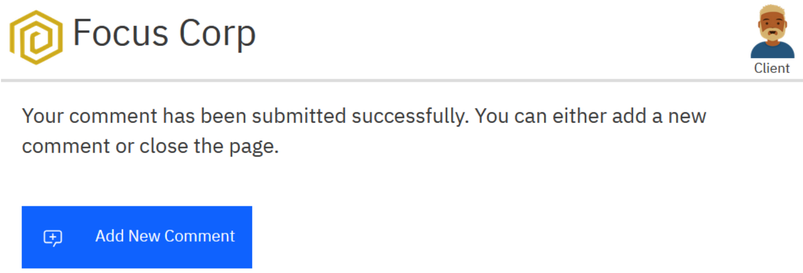
_39. **Copy and paste** a **comment** into the field. Select one of these two, that are in different languages but have the same meaning.

Chinese: 这真是难以置信！我两周前就提交了申请，但至今无人联系我。请立即解决这个问题！

German: Das ist unglaublich! Ich habe das Dokument vor zwei Wochen eingereicht und bisher hat sich noch niemand bei mir gemeldet. Bitte klären Sie das Problem umgehend!

_40. **Click** the **Post Comment** button to submit your comment.

_41. After a short moment you will see a confirmation page that lets you know that the comment was successfully added.



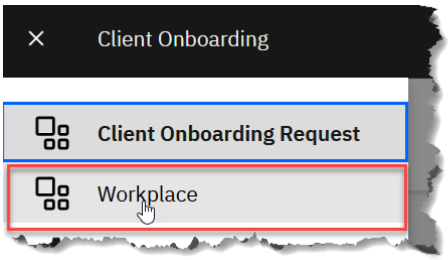
_42. **Close** the Comments Submission browser tab.

2.2.2 Checking the Review Client Onboarding Request task for the Account Mgr

You are now taking the role of a Focus Corp. account manager.

_43. Open or bring back in focus the browser tab of the Client Onboarding front-office intake app.

_44. **Click** on the **hamburger menu icon** in the top left corner and **select Workplace** to switch from the Client Onboarding app to your general workplace. After a short moment it shows the tasks available to you.

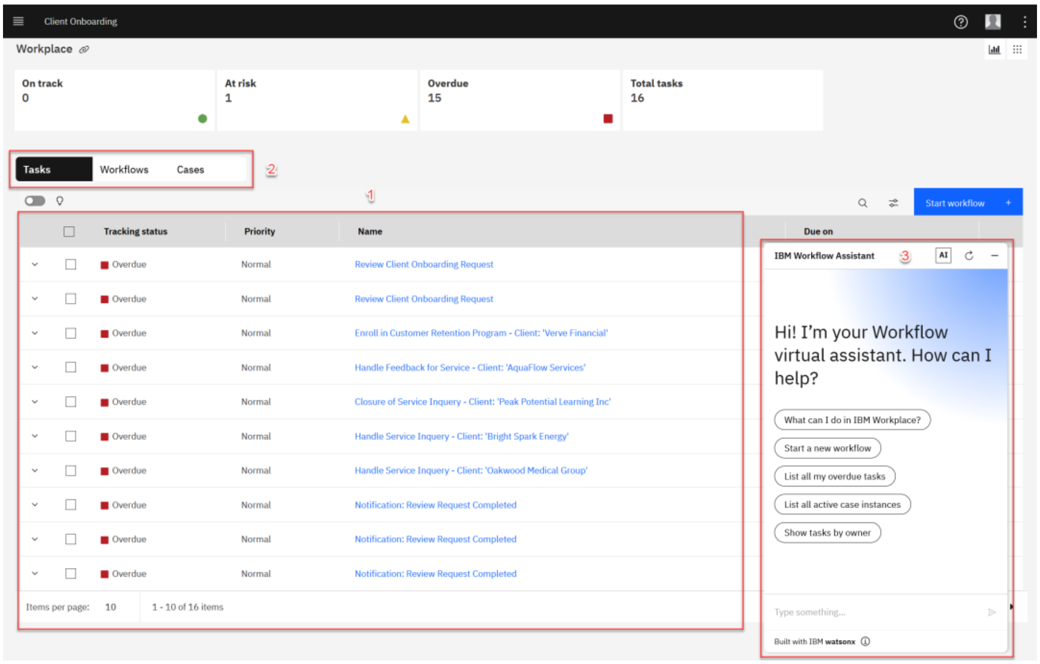


> Workplace is the next generation end-user client that complements the existing Process Portal and Case Client. It allows launching and working with processes and cases and unifies access to all kinds of tasks, workflows and cases. Its Workflow Assistant and Task prioritization features are additional examples of AI built into the product. When Task prioritization is enabled, it uses AI and historic runtime data to automatically order the tasks in the task list in terms of skill and impact, leading to workforce efficiency improvements.

_45. **Explore** Workplace including Workflow Assistant.

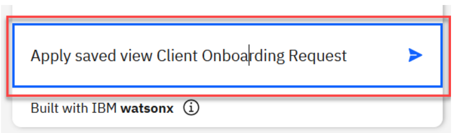
When launching Workplace your personal list of tasks is shown (1). You can optionally switch between Tasks, Workflows, and Cases (2). In the lower right corner Workflow Assistant will be shown (3). It may only appear with an icon , and can be shown in full by clicking on that icon.

> While you can see process instances on the Workflows tab in Workplace when you have active tasks, you will not be able to see the case or cases you have started. This is due to how the scenario is designed, to achieve full separation between multiple users performing the scenario simultaneously.

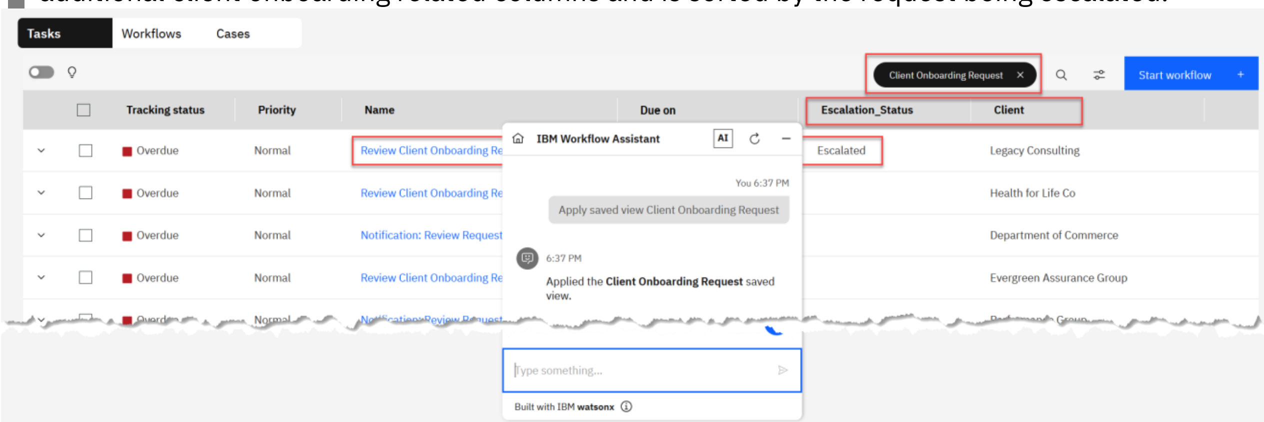


As employee of Focus Corp, you have plenty of responsibilities and tasks to work on. The default task list shows all your tasks and may be difficult to navigate when you want to focus on handling Client Onboarding requests.
For this lab, the task list was pre-populated with a mix of Client Onboarding tasks and some other tasks. The number and order of the tasks may differ from what is shown in the screenshot. Not all tasks fit on a single page and the task that originates from your onboarding request for Legacy Consulting is not even shown, as the list is sorted by Due date.

_46. **Enter Apply saved view Client Onboarding Request** into the Workflow Assistant window and either hit Enter or click on the blue arrow on the right side of the text field to execute the command.



Workflow Assistant applies a saved view with the requested name that has been pre-configured by Focus Corp. to only show tasks originating from Client Onboarding. In addition, the view shows two additional client onboarding related columns and is sorted by the request being escalated.



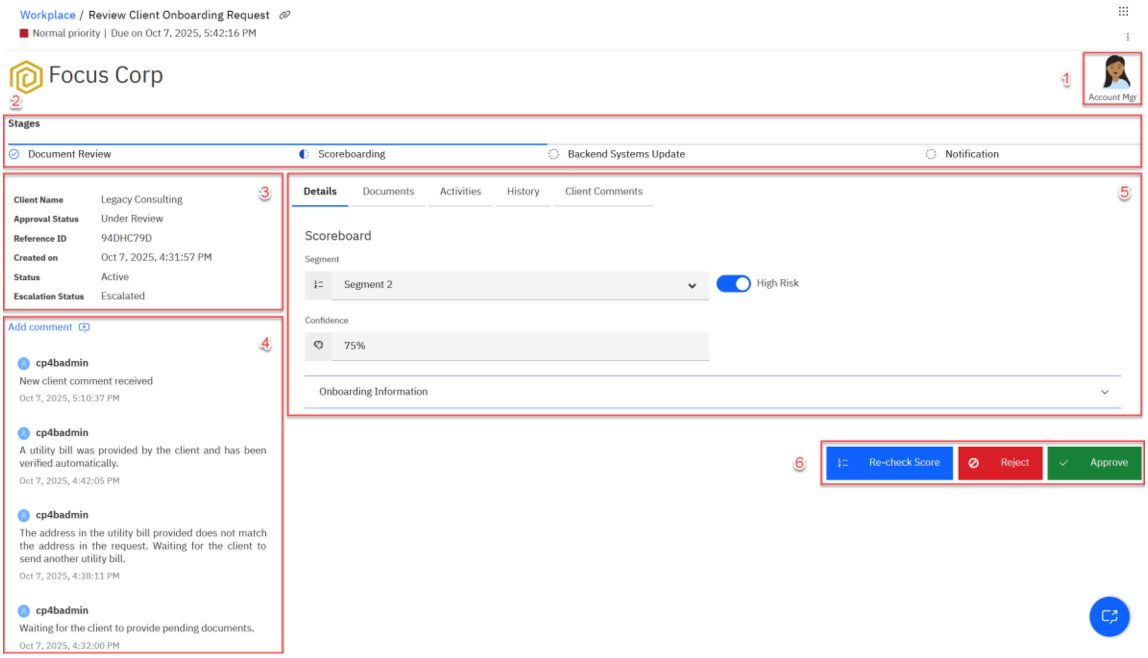
_47. **Open** the **escalated task** by clicking on it.

The task for reviewing the Legacy Consulting onboarding request is marked as escalated as you sent a comment that was identified to imply urgency and an unhappy tone.

> If the task is not showing up after some time, please check for any emails with document upload instructions. In case you are stuck please reach out to one of the instructors for help.
> Depending on the network latency it may take a moment until the task page is loaded.

_48. **Minimize** the **Workflow Assistant** and **explore** the **task page**.

The icon in the top right (1) signifies that you are performing this task as an Account Manager. At the top (2) the four stages of the request processing are shown. This task is part of the scoreboarding stage where you as the account manager have to manually assess those onboarding requests that have a confidence below 80%. The first panel on the left (3) provides a summary of the request, mainly the Client Name, Reference ID, Approval Status and Escalated Status. The panel below (4) contains comments related to the request, for example that all required documents have been verified. The main panel on the right (5) has five tabs. On the Details tab the scoreboard is shown that contains the segmentation, Legacy Consulting belonging to the Segment 2 clients, the risk assessment, here High Risk, and the Confidence for the risk assessment, here with 75% being below the threshold to take an automatic decision based on the risk (the actual values may differ slightly for your onboarding request).



_49. **Check** the **client's comments** on the **Client Comments tab**.

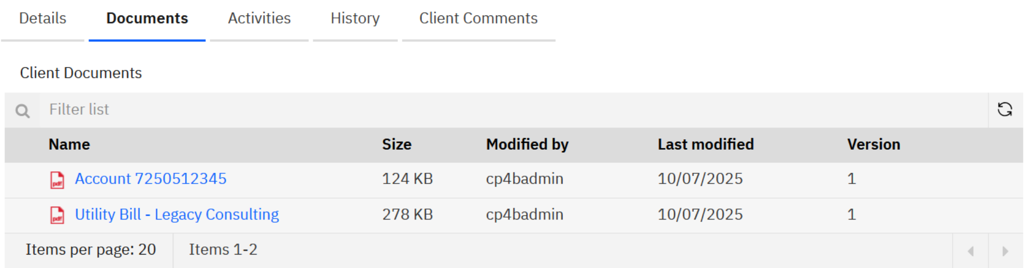
As you have noticed that this onboarding request has been escalated, you are starting your review on the Client Comments tab. You observe that the client is very unhappy as his onboarding request has not been handled in a timely manner.

> The table has one row per comment received from the client with the first column listing the time when the comment was received.
> The client comments feature of the Client Onboarding scenario makes use of the genAI activity within the Workflow capability. The original comment is handed to the genAI activity that makes a request to a large language model (LLM). A specifically crafted prompt requests the LLM to derive the tone, purpose, and up to five keywords from the comment. In addition, in case the comment is not in English, the LLM is requested to translate it into English. The result received from the LLM is then stored and displayed in the table.
> This usage is an example of how harnessing genAI can help to improve business efficiency by automatically analyzing comments received by clients and acting upon them automatically (setting the escalation status of the request) and also manually by the account manager.

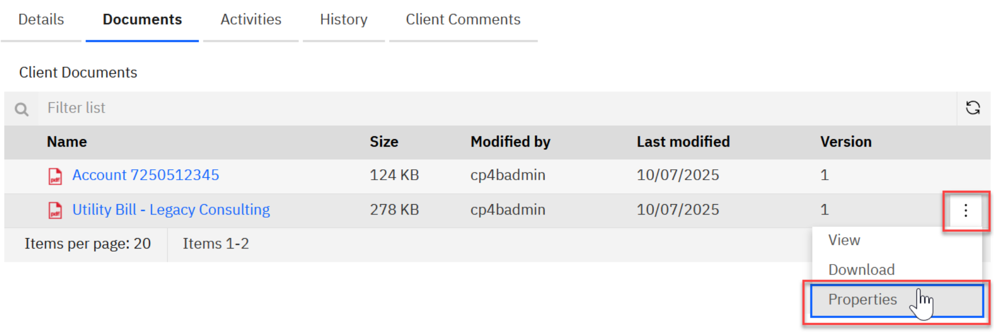
> Before you continue handling the review of the onboarding request, explore the other tabs in the main area.

_50. **Explore** the **Documents tab**.

The **Documents** tab shows the document (Account 7250512345) that you had previously selected on the Review Documents page of the Client Onboarding app. It has been made part of the actual onboarding request. In addition, the utility bill uploaded by the client that passed the validation is also part of the onboarding request.

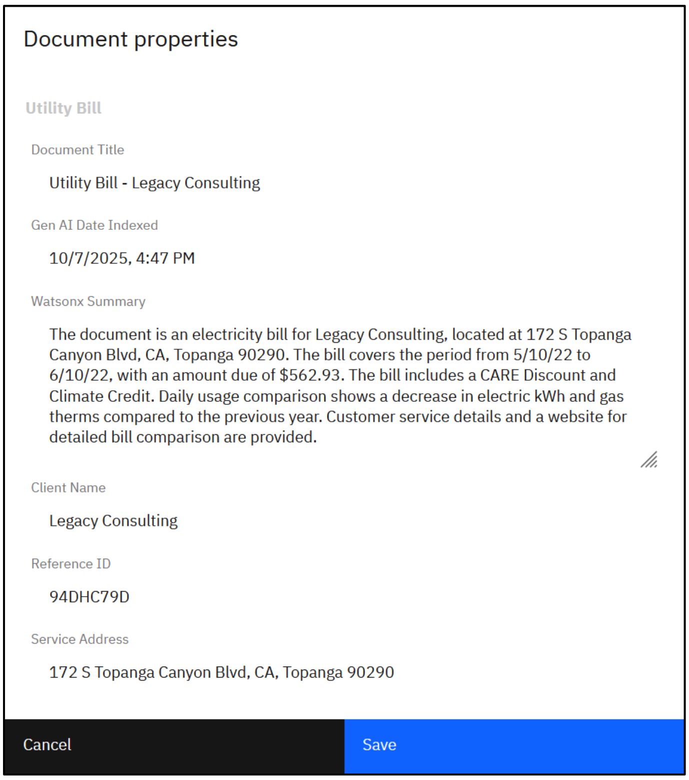


_51. For the **Utility Bill click** on the **three vertical dots** that appear when you hover over that row and **select Properties** to bring up the properties of this document. **Click Cancel** when done reviewing.



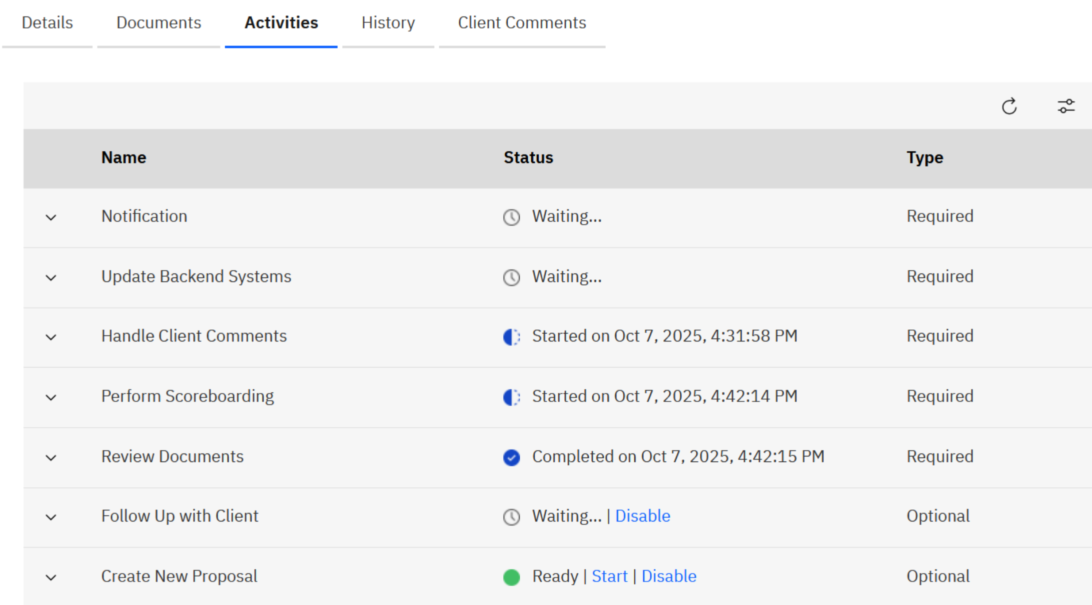
The properties shown reflect those values that got extracted when the document was uploaded. These values were also used to compare the address stored in the client onboarding request to the one in the utility bill.

In an environment with IBM Content Assistant enabled, the document gets indexed, and a summary is automatically being generated. It is part of the properties shown for the document.



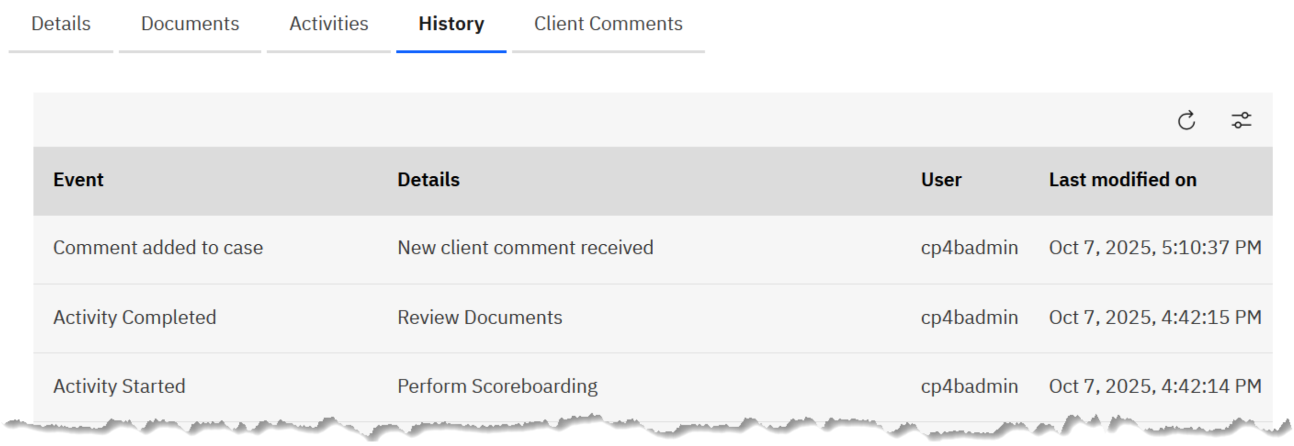
_52. Explore the Activities tab.

> The **Activities** tab shows the status and type of all activities of the client onboarding request. Since this is a case in the Workflow system, you can have a mix of required, optional, and discretionary activities defined in the case.
> The optional “Create New Proposal” activity is ready to be started by the account manager. For example, if they plan to reject this specific client onboarding request, they may still decide to make a different onboarding proposal (e.g. for a higher fee) to the client.
> The second optional activity, Follow Up with Client, is not yet enabled. The customer representative will be able to start it in the final Notification stage to initiate any follow up work with client.



_53. **Explore** the **History tab**.

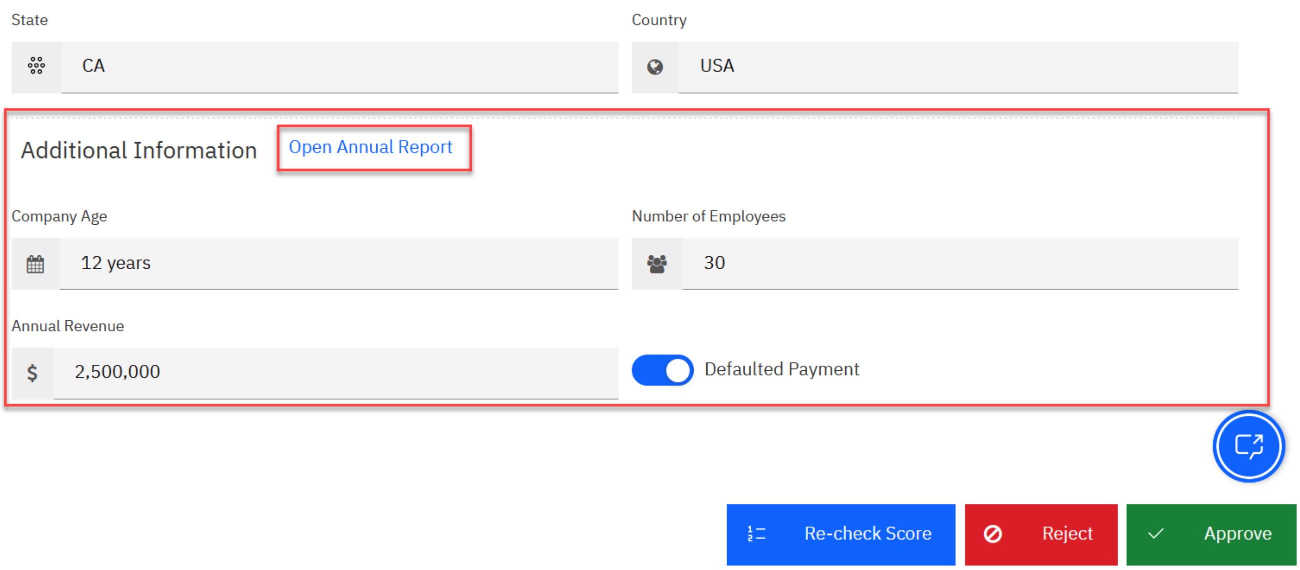
The **History** tab shows information about different types of events that happened for the client onboarding request.



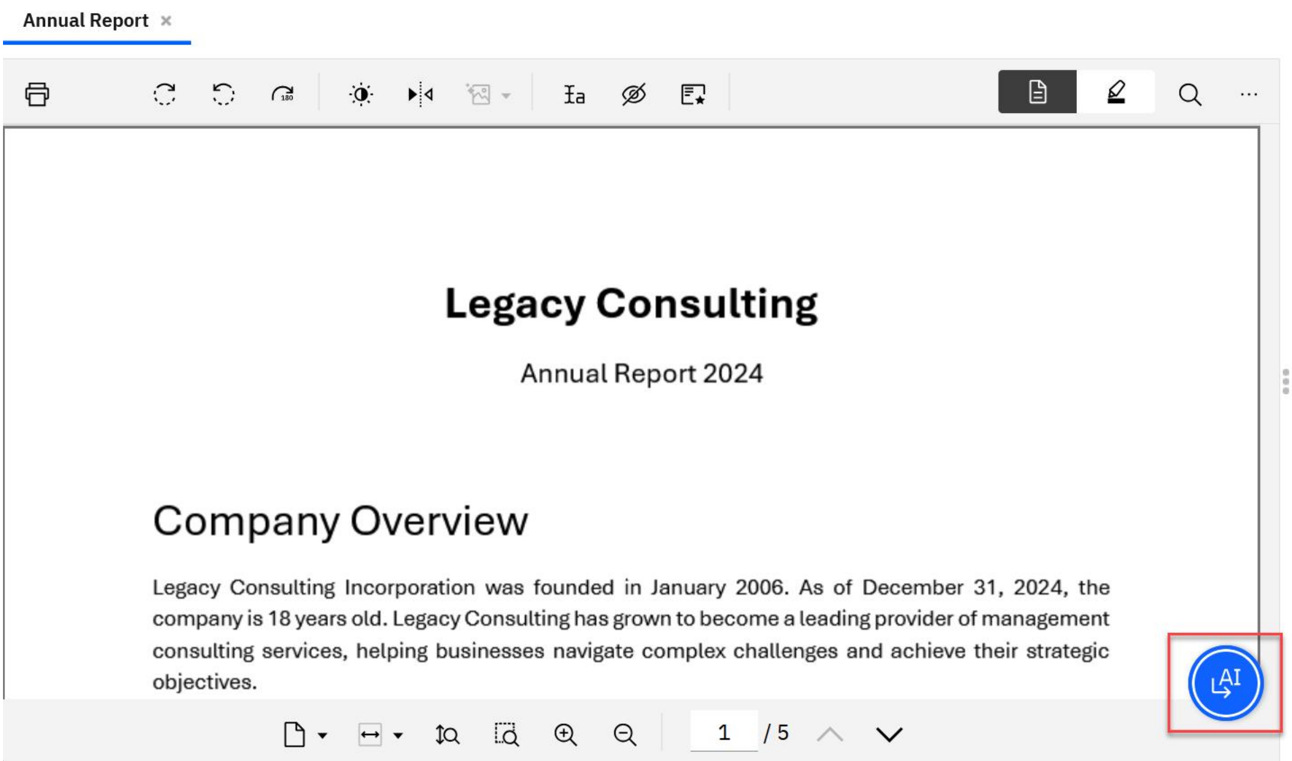
Now it is important to quickly deal with the onboarding request from Legacy Consulting to avoid further dissatisfaction.

_54. **Go back** to the **Details tab** and **scroll** to the **bottom of the page**.

You are mostly interested in the business situation of Legacy Consulting, which is reflected in the Additional Information section. Yet this is limited to only four core indicators.
You don't feel comfortable basing your decision on the data available. Fortunately Focus Corp has the latest annual report from Legacy Consulting on file. Due to that a link is provided to launch the annual report to gain deeper insides into Legacy Consulting's situation.



_55. **Click** on the **Open Annual Report** link, to open the annual report in the viewer in a new window.



_56. **Use IBM Content Assistant chat to ask questions** about the annual report.

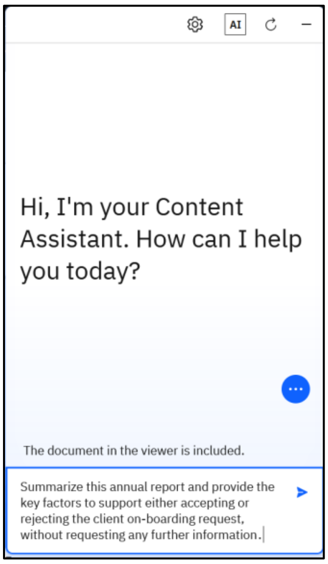
> An annual report is normally a lengthy document. Reading through it or even just skimming over it will take a long time. With IBM Content Assistant available the heavy lifting can be left to it by asking questions targeted at directly getting the required answers without spending the time to read the document.

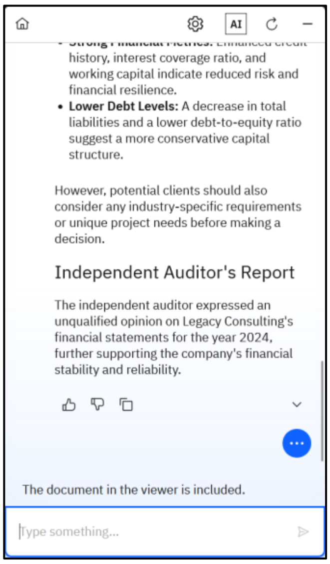
_57. **Open** the **IBM Content Assistant chat** by clicking on the round AI icon in the bottom right corner.

> In case the AI chat icon does not appear for you, please close the window and try opening it again.

_58. **Enter** the **following question** by copy/pasting it into the chat window.

Summarize this annual report and provide the key factors to support either accepting or rejecting the client on-boarding request, without requesting any further information.





> Study the output. IBM Content Assistant provides a thorough analysis based on the data that is available in the annual report.

_59. Optionally, **ask additional questions**.

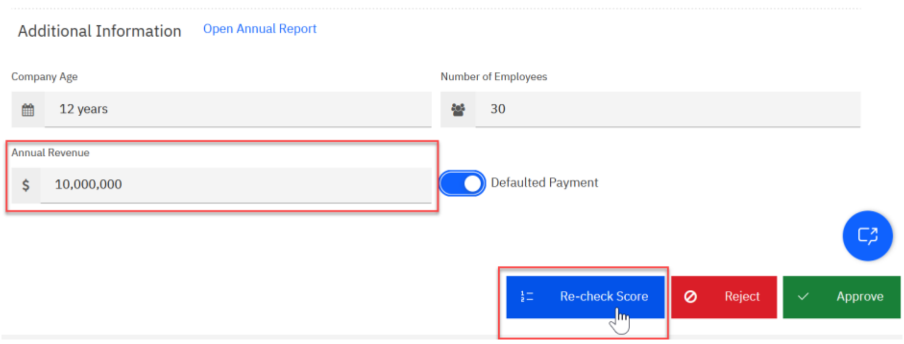
Provide a comparison of the annual revenue and income figures.

or

Provide a comparison of the outstanding debt and financial liabilities.

> You have learned from the annual report that the revenue is meanwhile at $10m. Therefore, you will revalidate the score based on the updated annual revenue.

_60. **Modify** the **Annual Revenue** to **$10,000,000** instead of $2,500,000.



_61. **Click Re-check Score** (5) to reevaluate the scoreboard and **observe** that neither the **risk** nor the **confidence** has changed.

> Despite the positive financial data in the annual report, you consider the risk of onboarding Legacy Consulting to the requested services as too high and will therefore reject their onboarding request.

_62. **Click Reject** (5) to reject the onboarding request by Legacy Consulting.

This will trigger an email to be sent to the client with the final onboarding decision.

> When you complete a task, the task may still be shown for some seconds in the task list in Workplace. It will disappear when the task list auto-refreshes itself.

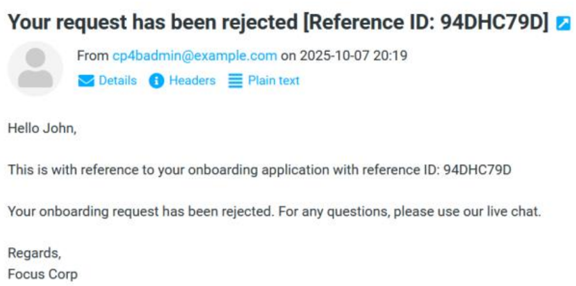
2.2.3 Checking the automatic email about rejected onboarding

Switch into the role of the client Legacy Consulting.

_63. Open the email client in a browser using the URL provided to you.

> If you specified your own email address on the first page, **open or bring your email client to the front**.

_64. **Check** your inbox for a fourth email (the sender depends on the configuration of the environment you are using).



_65. **Check** the **email** that contains the reference ID as displayed on the final page of the Client Onboarding app. It lets you know that your onboarding request has been rejected.

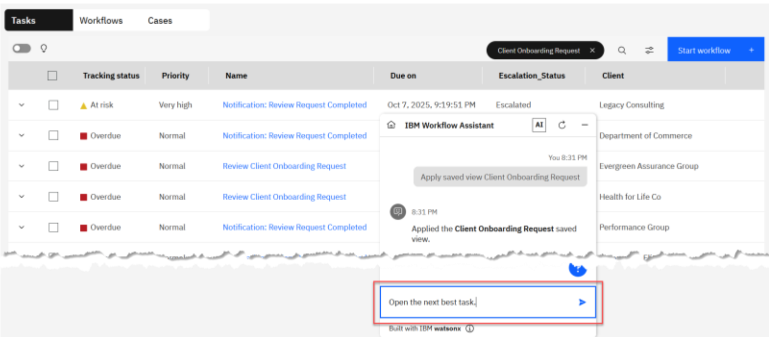
2.2.4 Checking the Client Rep notification about rejected onboarding

You again assume the role of the Client Rep who checks on the outcome of the onboarding requests they started.

_66. **Switch** back from the email client to the **browser** window containing the **Client Onboarding app and Workplace**.

_67. **Expand** the **Workflow Assistant chat** window by clicking on the icon and **type *Open the next best task*** to open the task that Workflow Assistant deems to be most appropriate to work on.

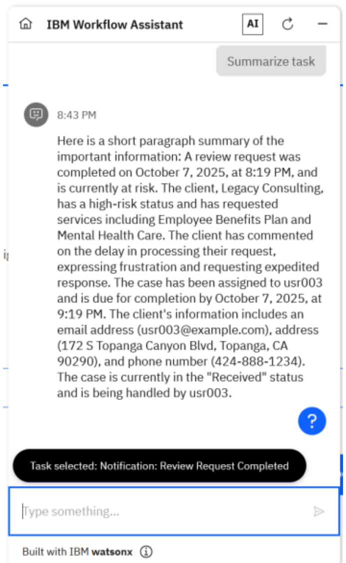
> In this case it is the most recent task, which is the notification about the rejection of the onboarding request for Legacy Consulting. In case Assistant selects a different task, close it and manually open the Notification: Review Request Completed task for client Legacy Consulting (the task may show at the bottom of the list).



_68. **Observe** the **Approval Status** that shows that the client onboarding request was **rejected**.

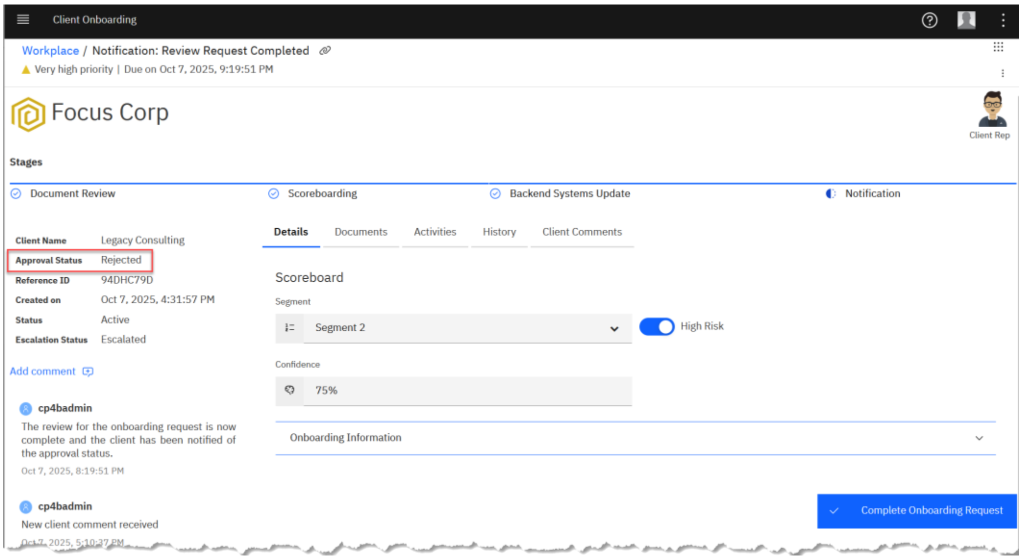
_69. **Expand** the **Workflow Assistant chat** window again by clicking on the icon and **type *Summarize task*** to get an automatically created summary of the task.

> In case instead of showing the summary, Workflow Assistant is asking you for the ID of the task, Workflow Assistant did not pick up the task context (this is a bug that will be fixed in a later fixpack). Please close the task, open it again by clicking on it and type Summarize task again.
> In case you keep seeing two blurry lines in the chat window forever, this is also a bug where the results is not properly shown in the chat window. Just proceed.



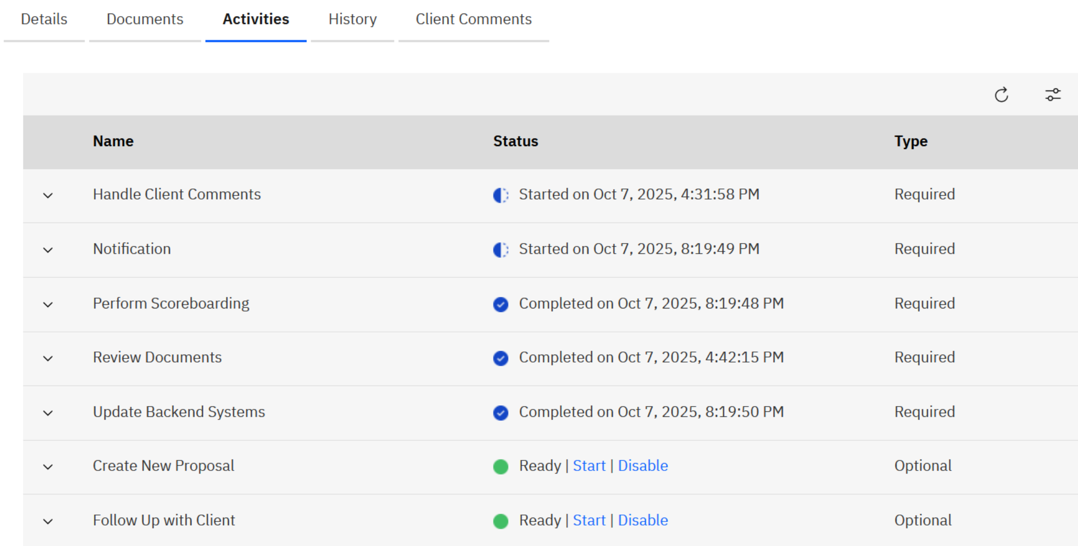
The summary contains some useful information like about the client escalation. In the background Workflow Assistant is using a large language model (LLM) to generate the summary for the currently active task.

_70. **Alternatively,** check the **Client Comments tab** to understand why this case is marked escalated.



_71. **Check** the **Activities tab**.

All required activities except the one you are in and the one that is used to receive client comments are completed now.
In addition to the optional activity **Create New Proposal** that has been ready before, now the optional activity **Follow Up with Client** is also ready. The client representative may decide to connect with the client as their onboarding request was rejected and Legacy Consulting was unhappy with the delayed response, to discuss how they could still be onboarded or explain the decision. Alternatively, the client representative may decide to create a new proposal for Legacy Consulting to still allow them to onboard to services from Focus Corp. but for example with different subscriptions fees.
Yet these activities are optional, as the customer representative may choose not to perform any of them but just complete the notification.

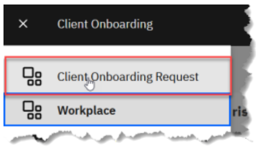


Details | Documents | **Activities** | History | Client Comments

Name	Status	Type
Handle Client Comments	Started on Oct 7, 2025, 4:31:58 PM	Required
Notification	Started on Oct 7, 2025, 8:19:49 PM	Required
Perform Scoreboarding	Completed on Oct 7, 2025, 8:19:48 PM	Required
Review Documents	Completed on Oct 7, 2025, 4:42:15 PM	Required
Update Backend Systems	Completed on Oct 7, 2025, 8:19:50 PM	Required
Create New Proposal	Ready | Start | Disable	Optional
Follow Up with Client	Ready | Start | Disable	Optional

_72. **Click Complete Onboarding Request** to complete the task. This closes the task and brings you back to the work list for the client representative.

_73. **Click** on the **hamburger menu icon** in the top left corner and **select Client Onboarding Request** to switch back to the Client Onboarding app.



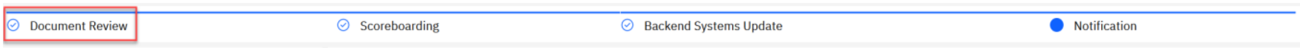
This completes the part of the exercise where you actively perform steps.

2.2.5 Review of Stages Performed Automatically

This section provides information on how different aspects that happen automatically as part of the Client Onboarding are performed. You will not actively need to perform any steps, just read about them. In chapter 3 you will again work directly with the Client Onboarding solution.

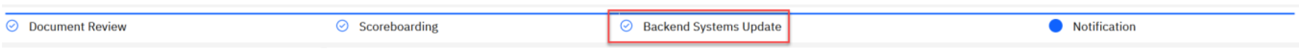
As part of the above client onboarding workflow, you worked on the second (Scoreboarding) and fourth (Notification) stage of the request processing. The first (Document Review) and the third (Backend Systems Update) stages were automatically completed, and no manual activities were needed to be performed.

2.2.5.1 Document Review



The first stage during processing the onboarding request is the **Document Review** stage. For the above request you have specified in the front-office intake app that only one of the two required documents are verified while the second (utility bill) was pending.
This caused the client to receive an email about the utility bill document they need to upload. While the onboarding request was started and the Document Review stage became active, it only contains an automatic activity that waits for a utility bill to be added to the case.
With the client uploading a valid utility bill that is attached to the request, the automatic activity gets started, performs some processing, and completes. This makes the Document Review stage complete as well. The verification of the utility bill is done by matching the extracted address from it with the address stored in the onboarding request. Only if both match the utility bill is accepted otherwise as seen another email is sent to upload a utility bill with the correct address.

2.2.5.2 Backend Systems Update



As part of the **Backend Systems Update** stage, Focus Corp. needs to update some of its legacy systems of record:

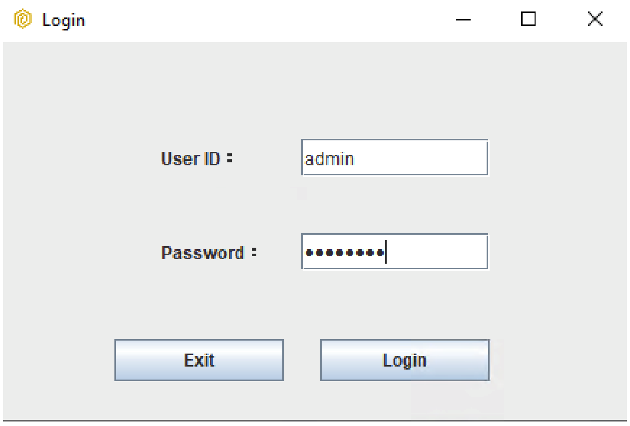
- The first is the Client Management System. It offers a Java rich client to add or update data.
- The second is the Service Management System. It offers a web interface to interact with it.

As Focus Corp. strives for a high level of automation, they want to update the legacy systems automatically without involving a user. This also helps to remove the risk of potential human errors when copying and pasting information from one system to another. Therefore, they apply IBM Robotic Process Automation (RPA).

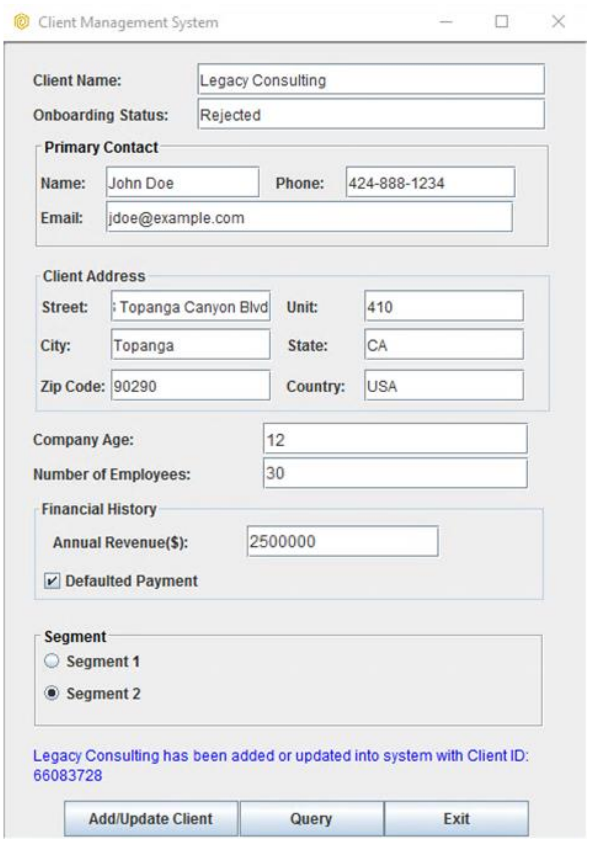
The execution of the RPA bot happens automatically in the background. To get an impression how the bot operates the following screenshots explain the steps performed.

The first step is to create a client record or update an existing client record in the Client Management System and to retrieve the Client ID for the client:

- The bot **starts** the **Client Management System** (with a Java UI) and **logs into it**.



- The bot enters all values from the Client Onboarding solution into the respective fields, clicks on the **Add/Update Client** button, and retrieves the **Client ID** from the output text.



- Finally, it **closes** the Client Management System by **clicking** on **Exit**.

As we rejected the onboarding request in the Scoreboarding stage, the bot does not need to record the services the client wants to onboard to in the Service Management System.

> These two System of Records in our scenario are just mockups of potential real client systems. They represent systems that don’t offer APIs at all to programmatically interact with them or where parts like updates are just exposed through the native UI and not an API. Such systems can easily be automated using the RPA capability.

3 Exercise: Onboarding a Client with High Confidence Level (Fully Automated)

3.1 Introduction

In this exercise, Automation Elite Inc. wants to subscribe to one service from Focus Corp.'s financial services.

You will again take over the role of the client representative, a Focus Corp. employee, who is on the phone with Automation Elite Inc. for this request. Initially, you collect all the required information before you submit the request.

Based on the information contained in the submission, the scoreboarding activity will classify Automation Elite Inc. as a Segment 1 client with a low risk profile and an assessment confidence equal or greater than 80%. Therefore, this onboarding request will be handled automatically without a manual review required by the account manager. The client will be informed about the decision via email while you, as the client representative, will get a notification task as you initiated the onboarding request.

This path through the onboarding scenario exemplifies one of the main goals when embarking on an automation journey, which is to automate business transactions as much as possible reducing the number of involved employees and therefore reducing cost, time required and manual errors.

3.2 Exercise Instructions

You will use the user assigned to you to perform all tasks as the client representative.

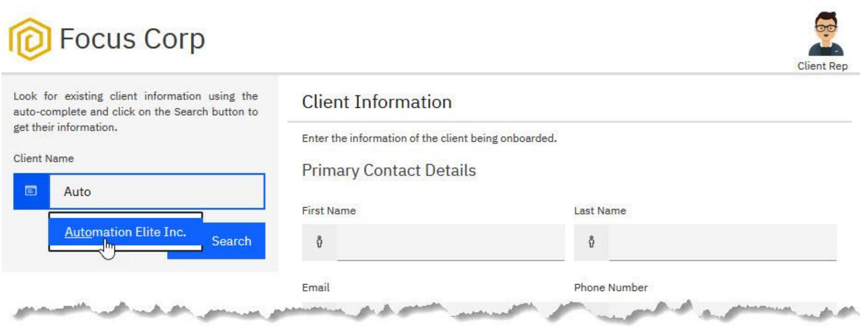
To remind you which role you currently perform, most screens show a Client Rep icon and label in the top right corner.

For this exercise, you will only assume the role of the Client Rep.

3.2.1 Taking the call from Automation Elite Inc. and collecting base information

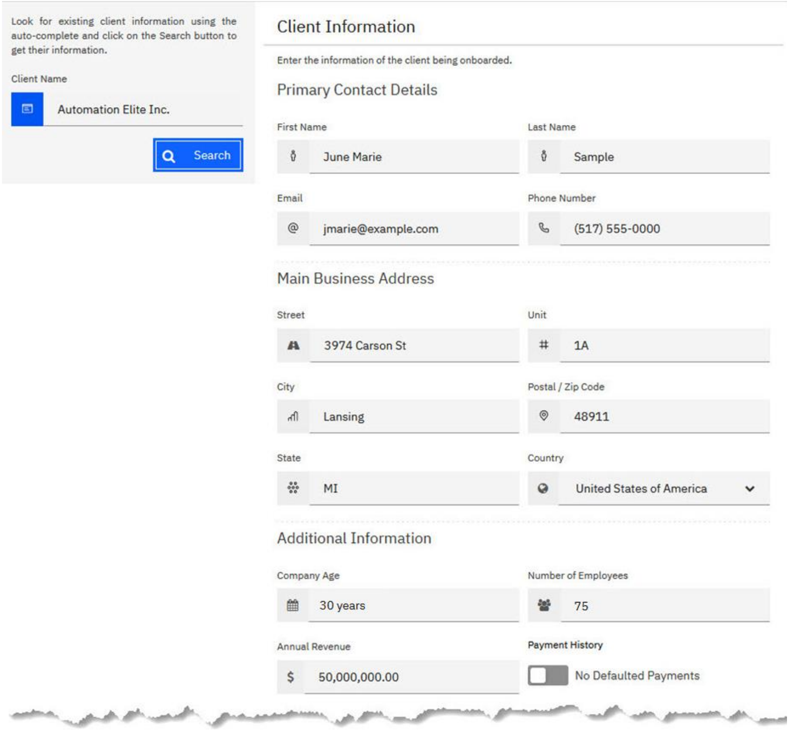
_74. If not already shown, **navigate** back to the **Client Onboarding Desktop**.

_75. As the **Client Representative type *Auto*** in the **Client Name** text field in the left panel to search for **Automation Elite Inc.** which is also an existing client of Focus Corp.

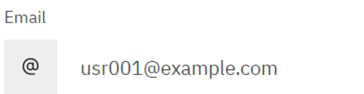


_76. **Click** on **Automation Elite Inc.** once the type-ahead feature offers it.

_77. **Click** on **Search** that got enabled when selecting Automation Elite Inc. to load the details for the client into the panel on the right. It retrieves the client details using integration with the Workflow capability.



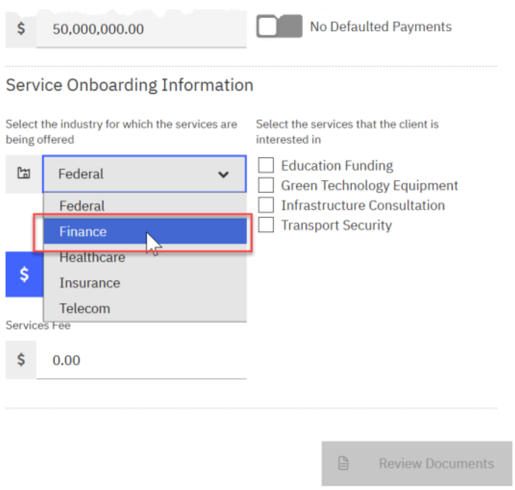
_78. The **Email** field is pre-populated with the local email address of your user and is read-only.



In case the environment you are using is configured to use an external email server, **optionally replace** the **Email** with an email address of your choice that you can use to receive client emails associated with the scenario.

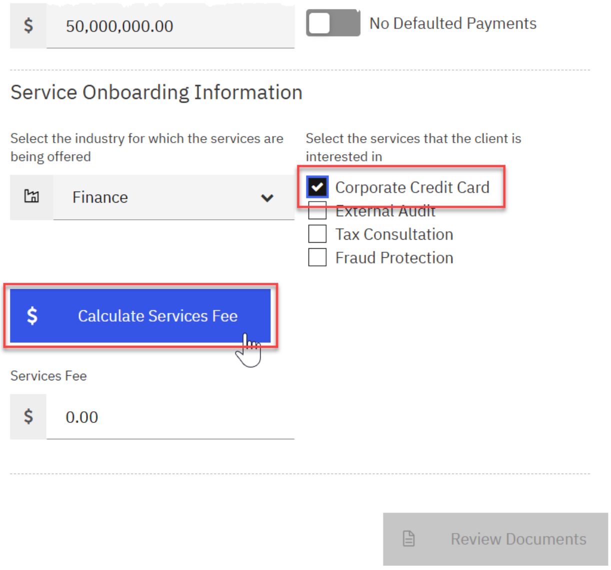
_79. **Select Finance** in the **Industry** drop-down list as Automation Elite Inc. requests to onboard to one service in that domain.

Selecting an entry from the drop-down dynamically changes the options in the services to onboard.

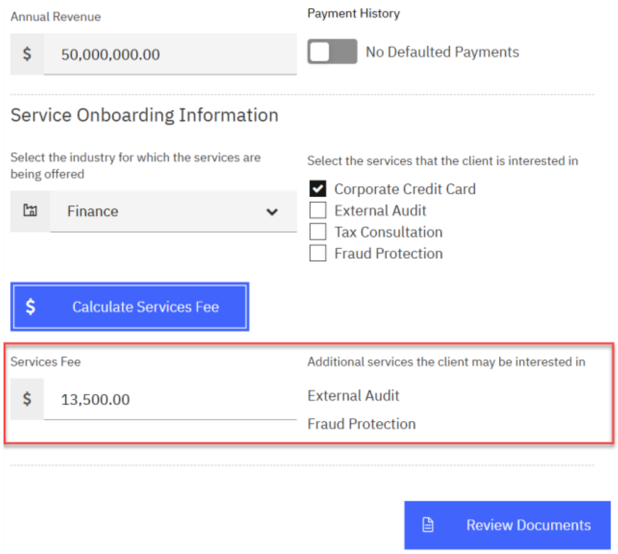


_80. **Check Corporate Credit Card** as the service that Automation Elite Inc. wants to onboard to.

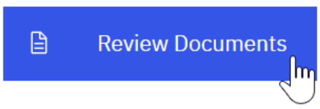
_81. **Click Calculate Services Fee** to calculate the fees and get potential upsell recommendations.



> The fees are calculated by an external service pricing engine build using prescriptive rules. The additional services that the client representative could offer as upsell opportunity to the client are currently also based on prescriptive rules but could also be generated based on a machine learning model.



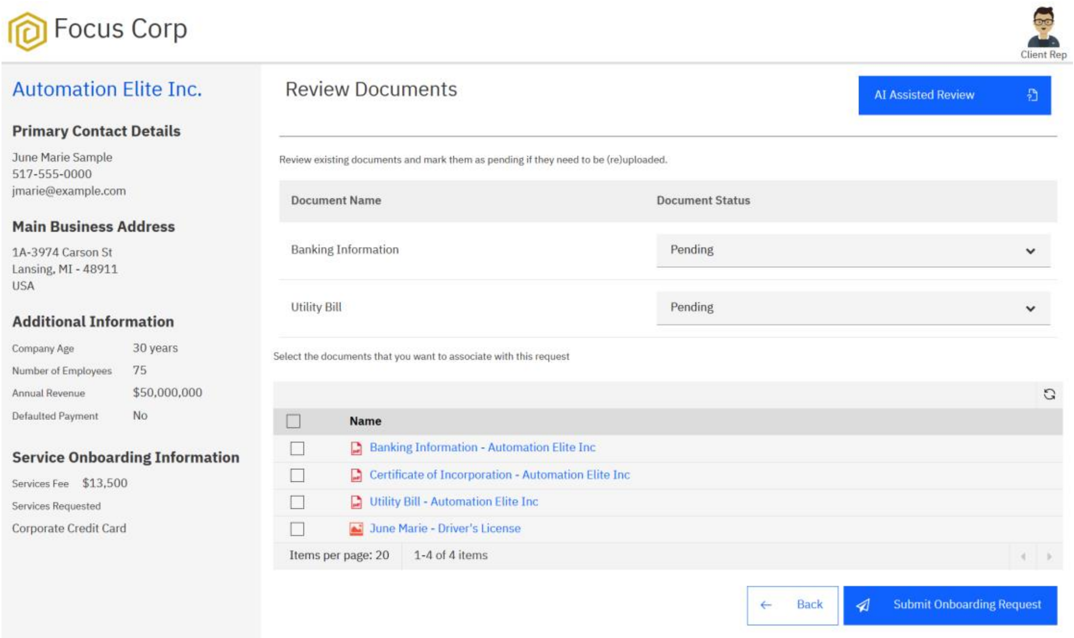
_82. **Click Review Documents** to navigate to the next page.



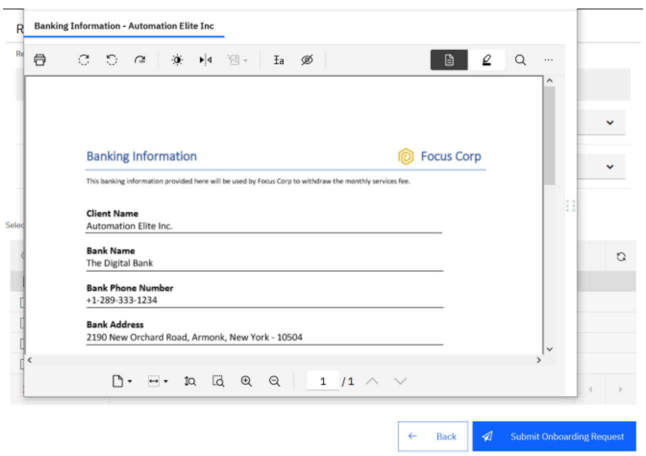
3.2.2 Verifying required documents and submitting the onboarding request

_83. **Explore** the **second page** of the Client Onboarding app.

The left pane lists all information provided on the previous page. On the right pane all documents that may be relevant to this onboarding request are listed with their individual status of either Pending (Default), Verified, or Not Required. At the bottom a list of all potentially relevant documents Focus Corp. already has for Automation Elite Inc. is shown.

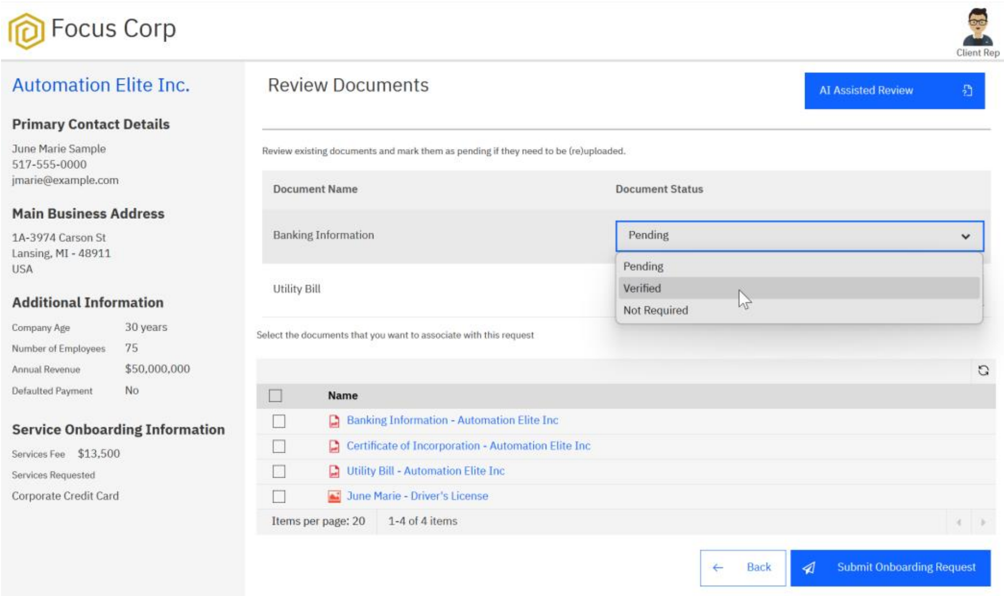


_84. **View** the **Banking Information – Automation Elite Inc.pdf** document by **clicking** the **three dots** at the right end of the row that appear when you hover over the line and **selecting View**. This opens the document in the integrated viewer. Afterwards **close** the viewer **window** again.

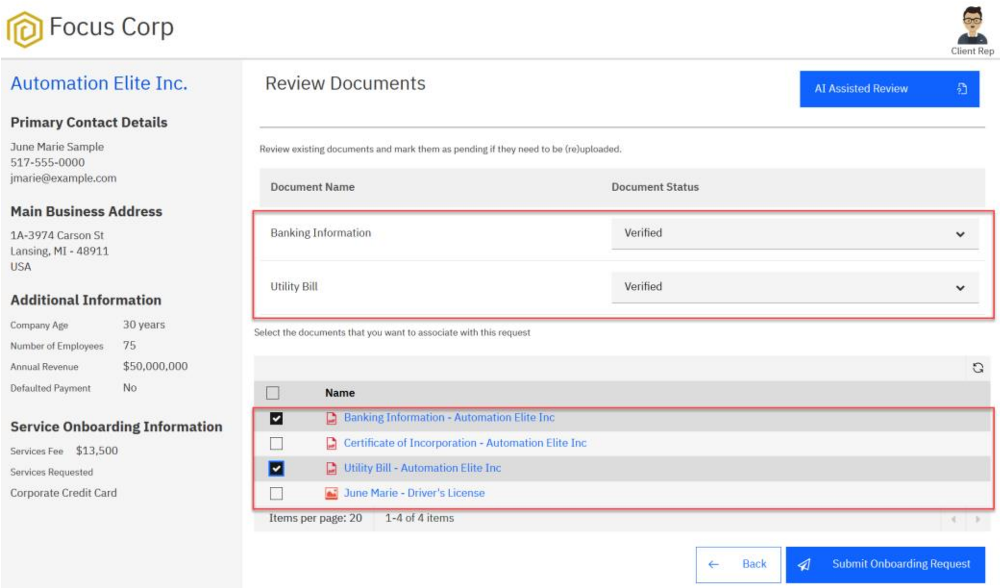


_85. **Select Verified** for **Banking Information** and **Utility Bill**.

This reflects the documents required for the selected service and the fact that these two documents are already available.



_86. **Check the boxes for the two documents Banking Information - Automation Elite Inc.pdf** and **Utility Bill – Automation lite Inc.** in the document list at the bottom to make these two documents part of the request when you submit the onboarding request.



> Alternatively you could have also used the AI Assisted Review feature the same way you did for Legacy Consulting.

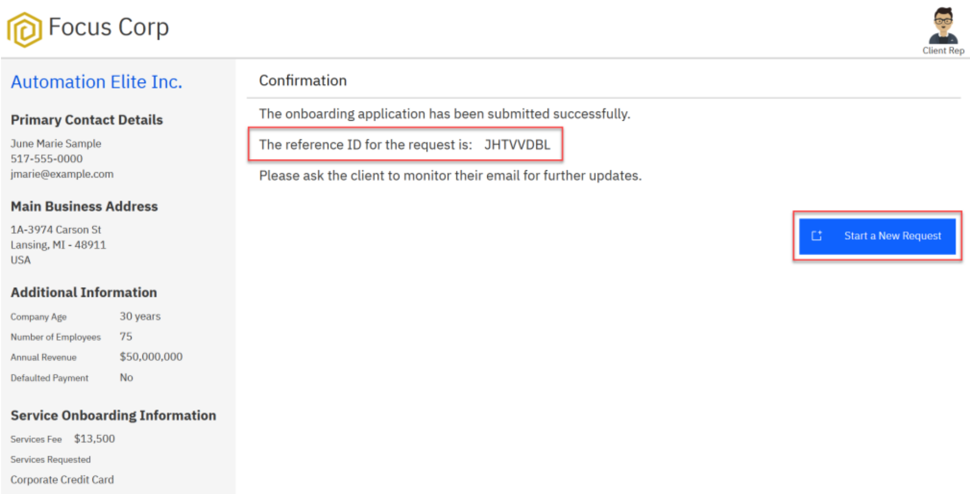
_87. **Click Submit Onboarding Request** to complete Automation Elite Inc.'s request and navigate to the final confirmation page.

The submission may take a few seconds during which you might notice a little spinner icon next to the Client Rep icon. Please wait until you are taken to the third page.

3.2.3 Onboarding request confirmation page

_88. **Explore** the **third page** of the Client Onboarding app.

The left pane again lists all information provided on the first page. The right-hand side provides a reference ID for the request that the client rep can share with the client and a comment that an email was sent to the client about their request.



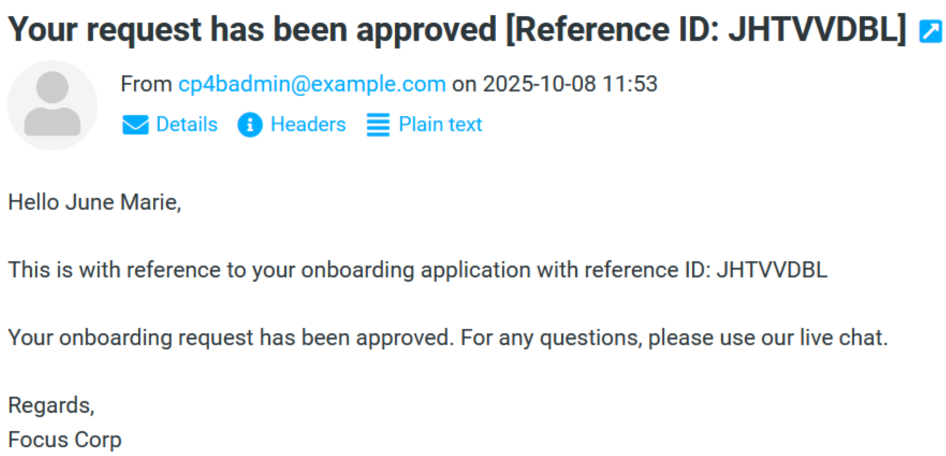
_89. **Click** on **Start a New Request** to get back to the first page to be able to continue onboarding more clients to Focus Corp.'s services.

3.2.4 Checking the automatic email

_90. Open the email client in a browser using the URL provided to you.

> If you specified your own email address on the first page, **open or bring to the front** your **email client**.

_91. **Check** your inbox for an email (the sender depends on the configuration of the environment you are using).

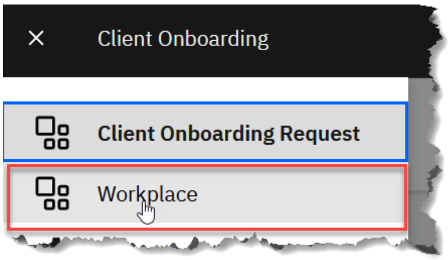


The email contains the reference ID as displayed on the final page of the Client Onboarding app. It lets you know that your onboarding request has been approved.

3.2.5 Checking the Client Rep notification about automated onboarding

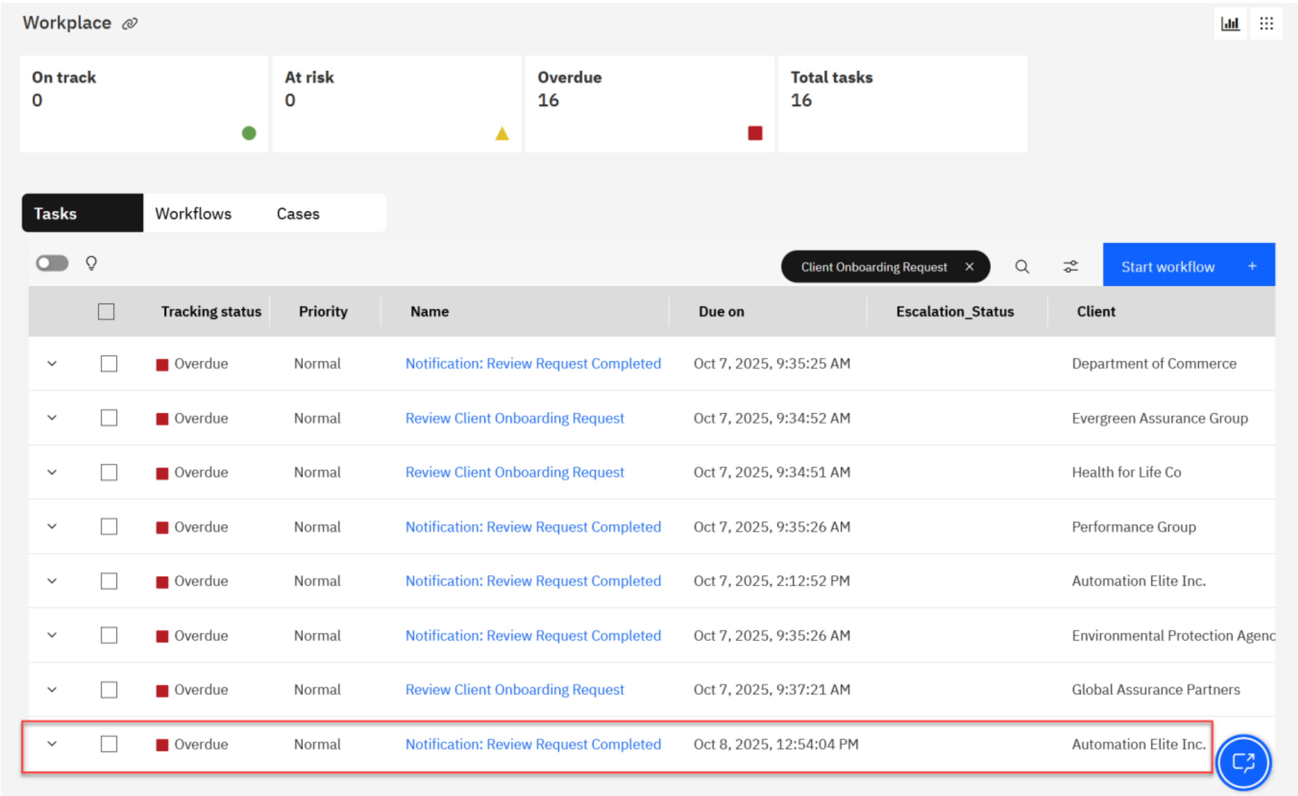
_92. **Switch** back from the email client to the browser window containing the **Client Onboarding app**.

_93. **Click** on the **hamburger menu icon** in the top left corner and **select Workplace** to switch from the Client Onboarding app to your general workplace. After a short moment it shows the tasks available to you.



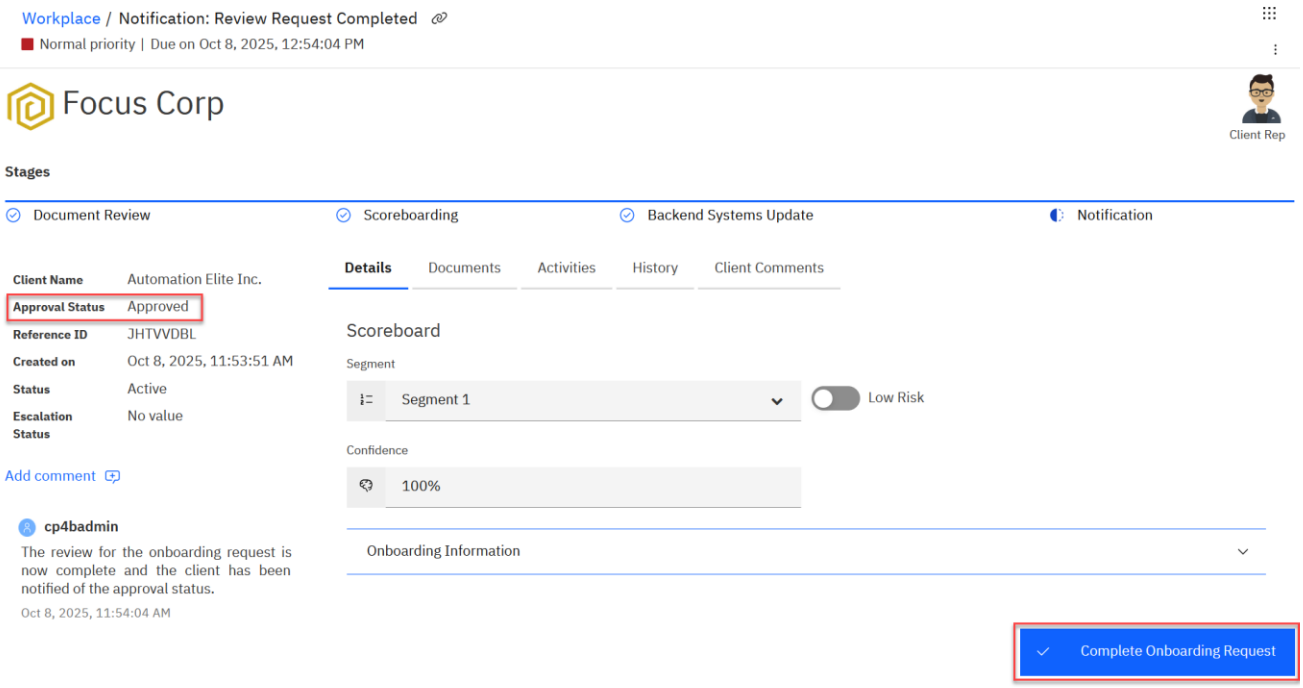
When you complete a task, the task may still be shown for some seconds in the task list. It will disappear when the task list auto-refreshes itself.

_94. **Open** the “Notification: Review Request Completed” **task** for Automation Elite Inc. that is available to you as client rep by **clicking on it**.



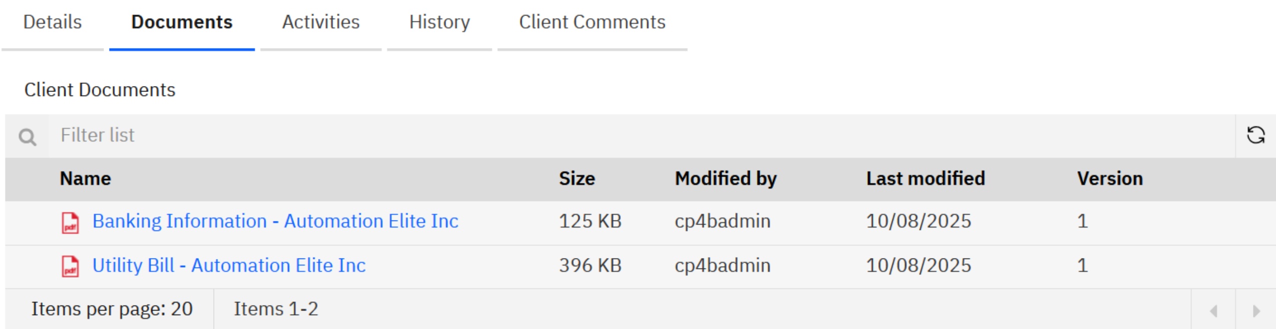
Depending on the network latency it may take a moment until the task page is loaded.
For this lab, the task list was pre-populated with a mix of Client Onboarding tasks and some other tasks. The number and order of the tasks may differ from what is shown in the screenshot.

_95. **Observe** the **Approval Status** on the task page that shows that the client onboarding request was **Approved**.



_96. **Explore** the Documents, Activities, and History tabs.

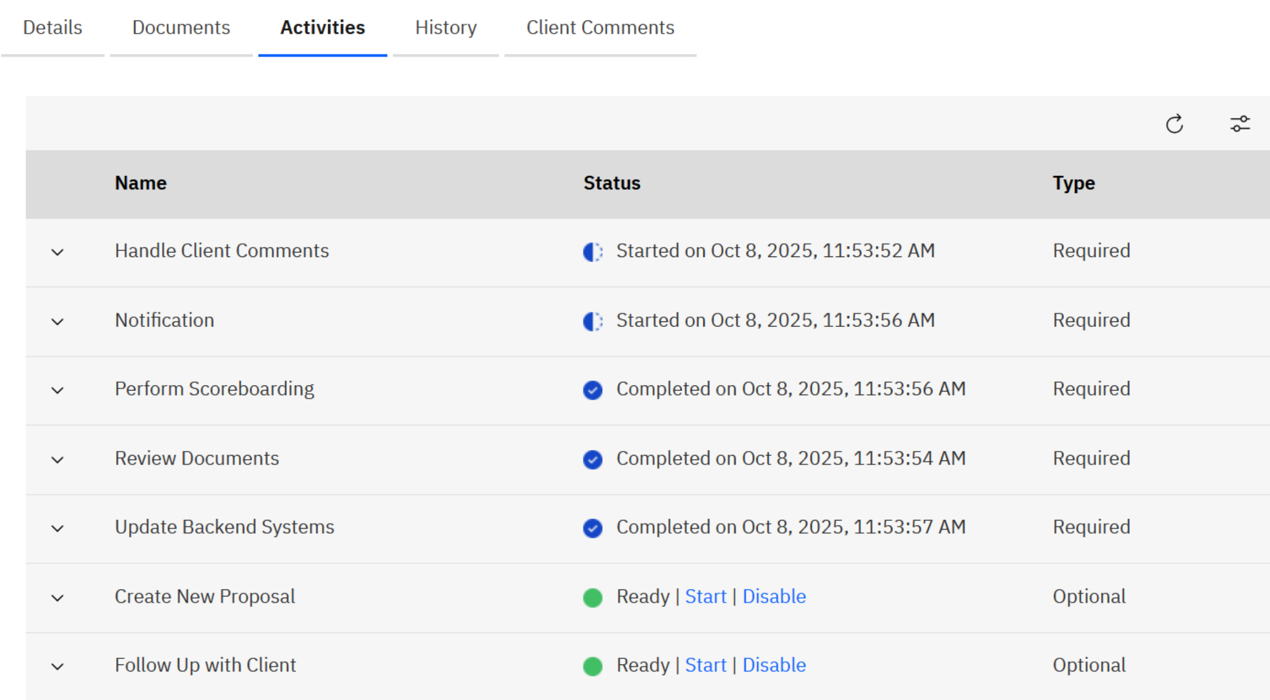
The **Documents** tab shows all documents that you had previously selected on the Review Documents page of the Client Onboarding app. They have been made part of the actual onboarding request.



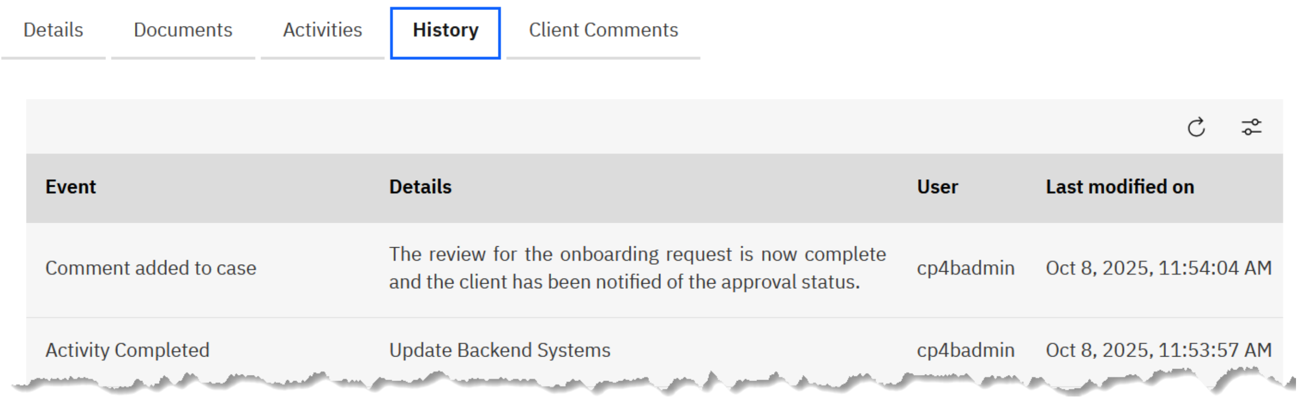
Name	Size	Modified by	Last modified	Version
Banking Information - Automation Elite Inc	125 KB	cp4badmin	10/08/2025	1
Utility Bill - Automation Elite Inc	396 KB	cp4badmin	10/08/2025	1

The **Activities** tab shows the status and type of all activities of the request. Since this is a case in the Workflow system, any discretionary activities defined in the case would be available here so that they can be started by the client representative.

> All required activities except the one you are in and the one used to handle incoming comments from the client are completed now.
>
> Two optional activities “Create New Proposal” and “Follow Up with Client” activities are ready to be started. The client representative may decide to connect with the client as their onboarding request was approved to discuss the next steps to utilize the service. In addition, the client representative may also decide to create a new proposal for Automation Elite Inc. to upsell additional services. Yet these activities are optional, as the customer representative may choose not to perform any of them but just complete the notification task.



The **History** tab shows information about different types of events that happened for the request.



_97. **Click Complete Onboarding Request** to complete the task. This closes the task, brings you back to the work list for the client rep and completes the fully automated onboarding for a low risk, high-confidence client like Automation Elite Inc.

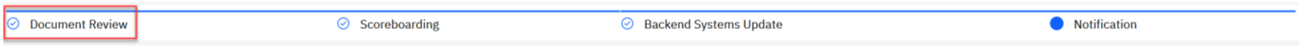
This completes the part of the exercise where you actively perform steps.

3.2.6 Review of Stages Performed Automatically

As part of the above fully automated client onboarding workflow you directly worked on the fourth stage (Notification) of the request processing. The three stages before that were already automatically completed and did not need manual activities.

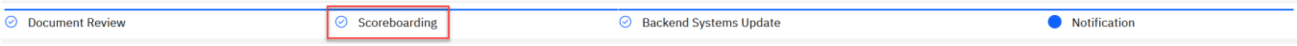
> This section provides information on how different aspects that happen automatically as part of the Client Onboarding are performed. You will not actively need to perform any steps, just read through them. In chapter four you will again work directly with the Client Onboarding solution.

3.2.6.1 Document Review



The first stage during processing the onboarding request is the Document Review stage. For the above request you have specified in the front-office intake app that the two required documents are already verified. Therefore, this stage completes automatically.

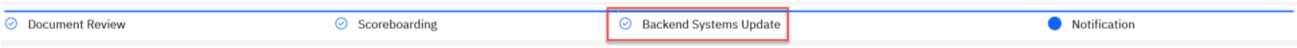
3.2.6.2 Scoreboarding



As described before, the Scoreboarding stage consists of two activities:
- The first activity automatically applies prescriptive rules and an AI model. It determines the segment this client belongs to, the risk associated with onboarding the client and the confidence of the assessment.
- The second activity is to manually review the onboarding request. However, in the request you created, the calculated confidence of the assessment is equal or above 80%. Therefore, the second activity to manually review the request by an account manager is skipped.

For your request the client has been automatically onboarded, and the Scoreboarding stage has been automatically completed.

3.2.6.3 Backend Systems Update



As looked at before in the Backend Systems Update stage, Focus Corp. needs to update some of its legacy systems of record:

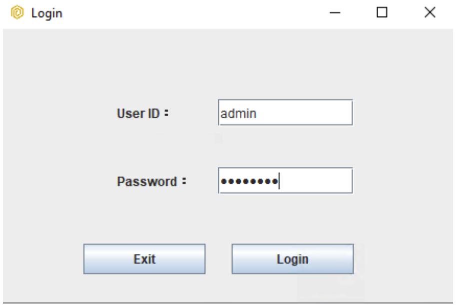
- The first is the Client Management System. It offers a Java rich client to add or update data.
- The second is the Service Management System. It offers a web interface to interact with it.

Striving for a high level of automation Focus Corp. wants to update the legacy systems automatically without involving a user. This also helps to remove the risk of potential human errors when copying and pasting information from one system to another. Therefore, they apply IBM Robotic Process Automation (RPA).

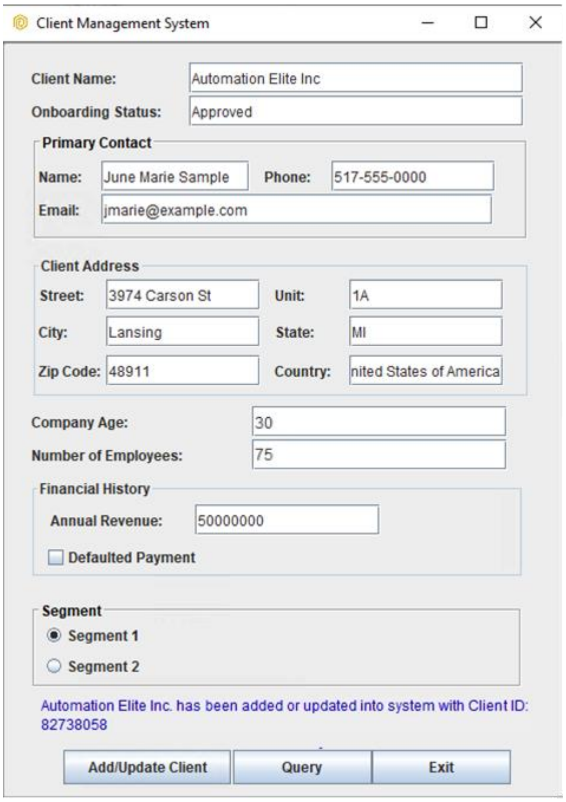
The execution of the RPA bot happens automatically in the background. To get an impression how the bot operates in this case where the client was onboarded the following screenshots explain the steps performed.

The first step is to create a client record or updating an existing client record in the Client Management System and to retrieve the Client ID for the client:

- The bot **starts** the **Client Management System** (with a Java UI) and **logs into it**.



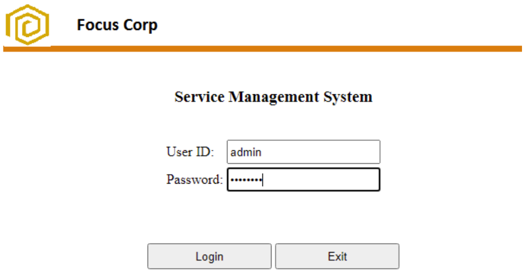
- The bot enters all values from the Client Onboarding solution into the respective fields and clicks on the **Add/Update Client** button and retrieves the **Client ID** from the output text.



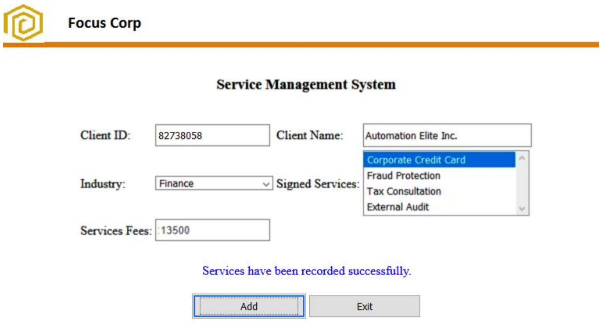
- Finally, it **closes** the Client Management System by **clicking** on **Exit**.

The second step is to record the services the client wants to onboard to in the Service Management System. This only applies when the onboarding request has been accepted, as it has been for Automation Elite Inc. during the Scoreboarding stage.

- The bot **starts** a **browser**, **navigates** to the **home URL** for the **Service Management System**, and **logs into it**.



- The bot **enters** the **Client ID** retrieved from the Client Management System as well as the **client name, industry, services** to be signed up to, and **services fees** from the Client Onboarding solution into the respective fields and clicks **Add**.



- Finally, the bot **clicks Exit** to **logout** from the Service Management System and **closes** the **browser window**.

> These two System of Records in our scenario are just mockups of potential real client systems. They represent systems that don't offer APIs at all to programmatically interact with them or where parts like updates are just exposed through the native UI and not an API. Such systems can easily be automated using the RPA capability.

4 Exercise: Explore the Business Performance Center Dashboard

4.1 Introduction

In this final exercise you switch into the role of the business owner of the Client Onboarding business of Focus Corp. You need to understand how your business performs and what actions to take to expand your business or course correct if needed.

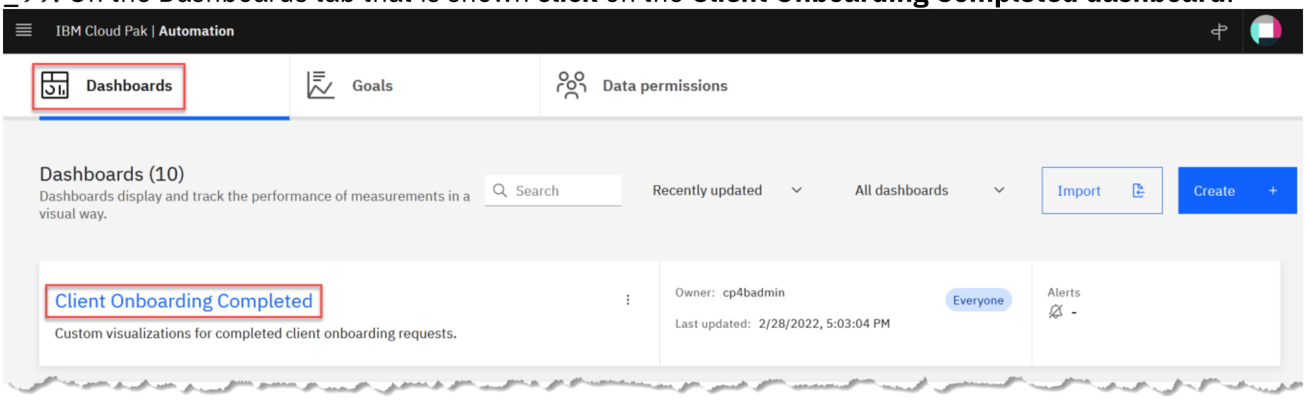
For this purpose, you will make use of **Business Performance Center** (BPC) as part of **IBM Business Automation Insights** (BAI). BPC provides easy to use and meaningful dashboards to visualize business relevant KPIs for lines of business to have a near real-time view on their business operations.

4.2 Exercise Instructions

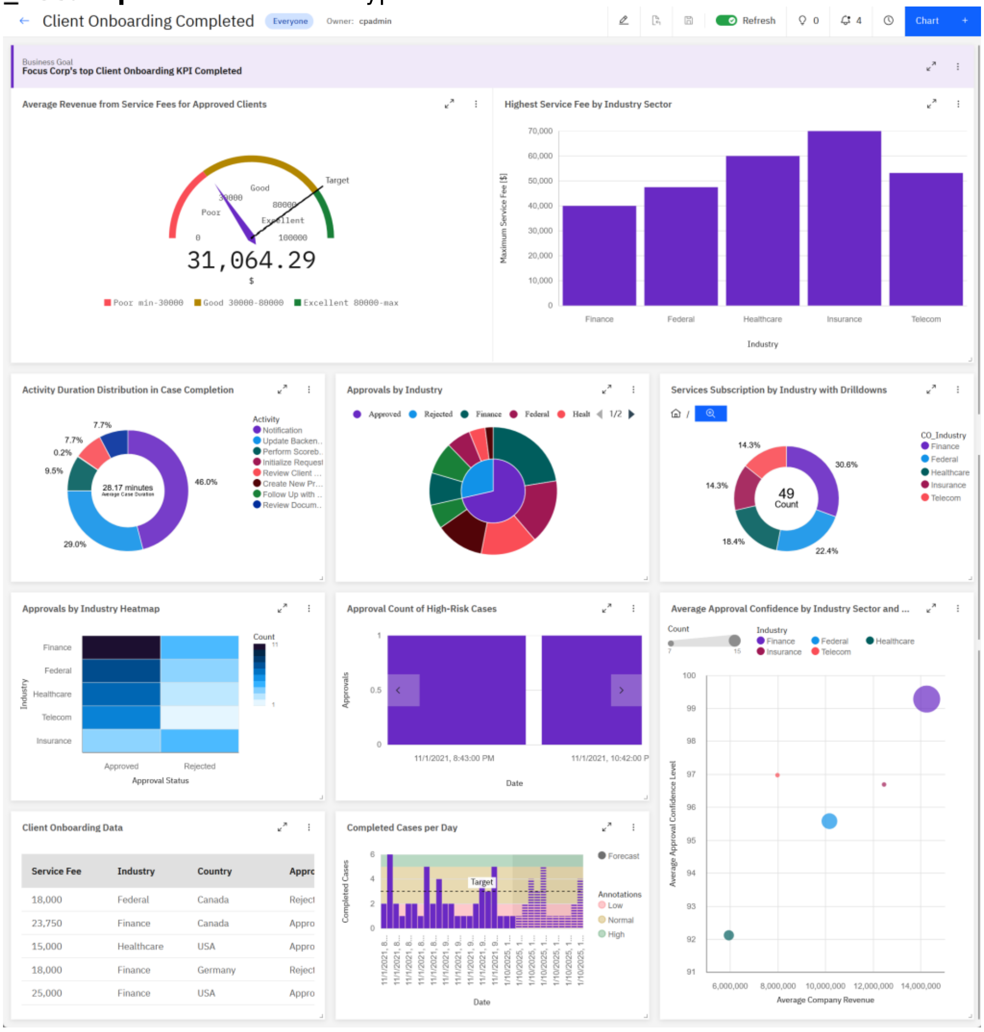
You continue to use the same user to access the BPC dashboard. You will see live data, so it may differ from the screenshot shown and may change over time as you and other participants perform onboarding requests.

_98. **Open** the **Business Performance Center** (BPC) using the link for your environment.

_99. On the Dashboards tab that is shown **click** on the **Client Onboarding Completed dashboard**.



_100. **Explore** the different types of charts and information in the dashboard.



Some examples of how to use the data based on the screenshot above are:

- In the **Approvals by Industry** chart (second row, center) hover over the two segments in the inner circle to see which segment shows the approved and which the rejected onboarding requests and their respective percentage. You can then hover over the segment in the outer circle to see from which industries these are coming and their percentage. You might for example see that your business is weak in the insurance sector (brown color above) with a significantly high number of onboarding requests being rejected. This may lead you to investigate this issue more deeply and start an advertisement campaign.
- This is especially true looking at the **Highest Service Fee by Industry Sector** chart (first row, right) which indicates that in the Insurance industry you earn the highest service fees.
- In case the **Approval Count of High-Risk Cases** chart (second in the third row) shows a high and potentially increasing number of approvals for high-risk onboarding request, you might want to investigate the cause of this. One reason might be that the machine learning model needs to be retrained or the threshold for the confidence needs to change. Another reason could be that your account managers approve too many high-risk onboarding requests to not lose business which may have a negative effect on the risk profile of your business.
- The **Completed Cases per Day** chart (second in the third row) can help you to see the distribution of completed onboarding request per day over a period of time. It also provides you a forecast based on past activity. This can enable you to plan your budgets and capacity.

5 Usage of (generative) AI to enhance the Client Onboarding solution

5.1 Overview of AI features in Cloud Pak for Business Automation

Over the last couple of releases the capabilities in Cloud Pak for Business Automation have been extended to include various forms of AI features.

At the beginning, Automation Decision Services introduced the ability to incorporate machine learning models into rule-based decisions and Workflow added machine learning based task prioritization.

With the advent of Assistants and generative AI, several great features have become available in late 2024 and 2025:

- **IBM Content Assistant** (documentation)
  The Content Assistant provides natural language insights about business content in your IBM FileNet Content Manager repository. It saves you time by avoiding manual, repetitive review of document content and allows you to quickly find information across large volumes of content. IBM Content Assistant includes generative AI capabilities that can summarize document content, compare documents and versions, and provide accurate answers to questions within the context of the selected business content in an IBM FileNet Content Manager repository. These capabilities are based on the IBM watsonx Large Language Model (LLM) that is coupled with context-specific Retrieval-Augmented Generation (RAG). The RAG augments the LLM with context-specific knowledge base and information that is hosted in the IBM FileNet Content Manager repository.
  In all of that, IBM Content Assistant honors access rights defined for the documents in the IBM FileNet Content Manager repository. Having this type of governance sets it apart from other RAG-oriented solutions available in the market.
- **IBM Workflow Assistant** (documentation)
  IBM Workflow Assistant is a watsonx conversational assistant integrated in Workplace. It provides an embedded web-chat interface, which you can use to interact with Business Automation Workflow through natural conversation.
  The assistant uses large language models (LLM) to answer specific questions, extract and summarize information, generate content, or complete generative AI tasks. By answering questions and generating content in response to your prompts, the conversational assistant makes it easier for you to find, prioritize, and complete tasks or cases at speed. Ultimately, Workflow Assistant improves your work efficiency through an interactive and intelligent user experience.
- **genAI task in Business Automation Workflow** (documentation)
  Generative AI tasks, that can be added to Service Flows in Process Designer, leverage watsonx.ai AI solutions to facilitate the creation of distinctive and engaging content. Generative AI tasks produce text that is based on your specific input, enabling the creation of a wide range of content. For instance, they can assist in generating product descriptions, blog posts, or social media updates. This feature improves efficiency by automating content generation, enabling your team to dedicate more time to other essential tasks.

5.2 How these AI features are used in the Client Onboarding Scenario

Incorporating Cloud Pak for Business Automation (gen) AI features within a business solution streamlines business operations and improves employee productivity. In this section we'll explore how such additions to the Client Onboarding scenario help enhance the user experience.

We'll explore those integration points in the order of the use-case flow as experienced by the user:

- **Content Assistant:** The front-office intake app now leverages Content Assistant, aiding the client representative in efficiently identifying and checking the required documents.
  The integration, based on the GraphQL interface of Content Assistant, operates to seamlessly and dynamically classify available documents without using a chat interface.
  To inspect the underlying GraphQL query, open your browser's developer tools, navigate to the network tab, and click the AI Assisted Review button.
- **genAI task:** When the client posts a comment to their onboarding request, the comment is received as plain text. Before storing it into the case, the comment is passed to an LLM via the genAI task in a Serviceflow. The genAI task, configured with a prompt and several examples, processes the text and extracts valuable data such as tone, purpose, keywords, and optional translation and stores then into the case.
- **Workflow Assistant**: In their daily, and heavily handed manual work, account managers and customer representatives will leverage the powers of Workflow Assistant, embedded in Workplace, to simplify task navigation and summarization, thus expediting task completion and optimizing their work through an AI-driven user experience.
- **Content Assistant**: In the situation where an account manager needs to further research financial information about Legacy Consulting from its annual report, the task can be daunting. With the advent of Content Assistant, however, the user experience is transformed into a chat interface, embedded into the Daeja document viewer, providing accurate and contextual responses to queries without having the need to read through or skim over the extensive document.

These examples showcase the transformative nature of integrating AI capabilities into existing solutions.

6 Outlook

The Client Onboarding scenario is ever evolving. While it is already very comprehensive some interesting aspects are not yet implemented:

- **Business Insights into how Client Onboarding is performing**

  Focus Corp. would want to have operational dashboards available for their managers to get operational details on the execution of the solution components to understand metrics such as task distribution, time taken by services, number of decisions executed and so on.

- **Client Onboarding to Focus Corp.'s Services Online**

  Currently the client must call Focus Corp. to place their onboarding request by talking to a customer representative. Focus Corp. may want to allow clients to request onboarding themselves by filling in a form. In addition to the ability to upload missing documents online, Focus Corp. may want to offer a self-service capability on their web site.
  In a future version of the end-to-end scenario, an agentic chat capability based on watsonX Orchestrate could be added to facilitate such requirements.

- **Analyzing the Client Onboarding solution using IBM Process Mining**

  Focus Corp. is always looking for improvement opportunities to streamline their business activities. **IBM Process Mining** provides various means of analyzing execution logs of performed business processes to generate insights on how to improve them.

  One of the challenges is having access to execution data to derive meaningful insights from. IBM Process Mining provides built-in capabilities to extract these from the Workflow capability as a part of Cloud Pak for Business Automation.

- **Utilizing the capabilities of other IBM Cloud Paks**

  Focus Corp. has multiple custom Systems of Records and packaged solutions that should be connected to the client onboarding solution. Similarly, as this is a very critical business application, Focus Corp. needs to ensure that it is constantly available, outages are avoided, or that it can at least be recovered instantly. As the solution accesses critical client data and internal information, it needs to be secured against any threads and attacks. Finally, as Focus Corp. is seeing the value of using machine learning they want to expand on it introducing proper governance etc.
  In a future version of the end-to-end scenario, we expect to address these by integrating capabilities from the

  - IBM Cloud Pak for Integration to address connecting various systems
  - IBM Cloud Pak for Watson AIOps to automate IT operations and deliver actionable insights
  - IBM Cloud Pak for Security to gain insights into threats and risks and respond faster
  - IBM Cloud Pak for Data to scale AI-powered transformation easily by unifying data and tools in a single solution

This completes the lab to experience how IBM Cloud Pak for Business Automation can be used in a simplified version of a Client Onboarding solution as part of Focus Corp.'s service business.

Congratulations on completing the lab!

> We love to hear your **feedback**.
> Depending on the venue, please provide feedback via the Slack channel, during the Webex calls, by sending an email to the author (Olaf.Hahnl@de.ibm.com), and through the survey at the end of the event.