

1 business owner

notes

For other services, it could take up to 5 days to receive credentials

if cheques are ordered, wait time could vary up to 10 business days

if signed up for corporate credit card, could take up to 45-60 days to receive it

PIN usually comes one day after the card

STAGE

Getting prepped for account setup

Wait up to 1 day approx.

STEP

Answer questions around services setup	Gathering necessary documents and signers - once	Send documents and signers (over email)	Receive the forms, sign them	Account information documents are received	Getting set up pre authorized payments (debit card)	encrypted email with credentials and a PDF with user guide	If my RM perceives that I need help learning the online banking tool, a person comes help me
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ACTION

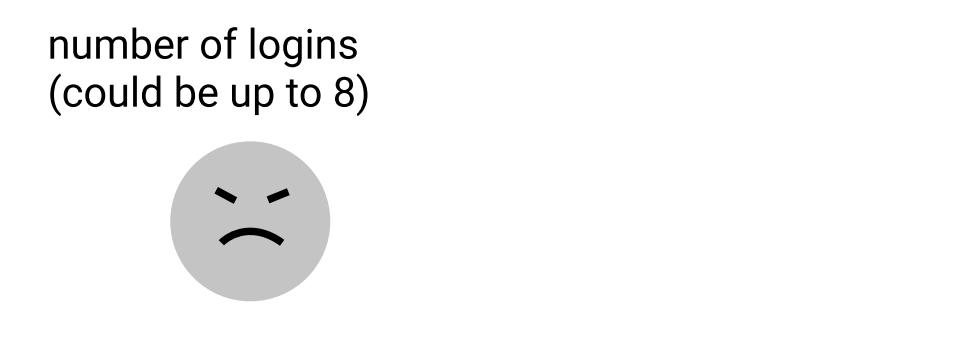
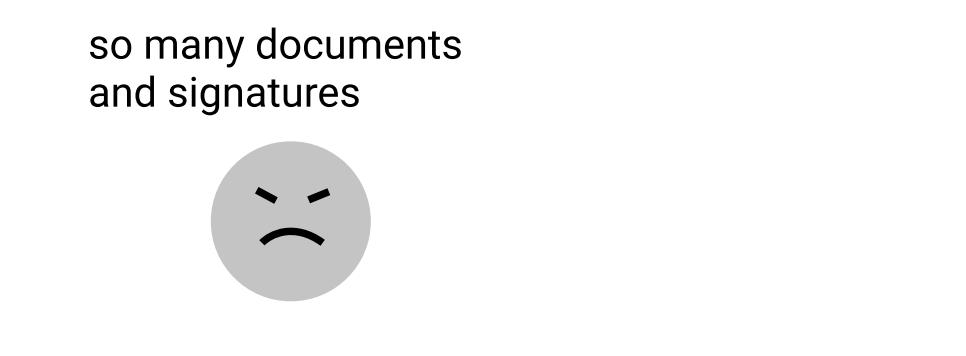
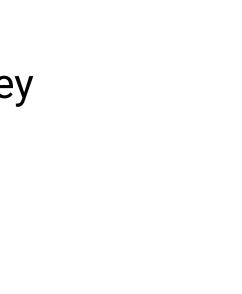
Provide all documentation	Set up signers of the account	Signatures (could be electronic)
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board meeting

CHANNEL

email (sometimes)	Preferred method by client (email, going into the branch or receiving RM at office)
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EMOTIONAL JOURNEY



Set up process average time: next day turnaround to client

BACKSTAGE

Create CIF for the entity	Create a CIF for the individual (owner / signer)	Info into T24 of business	Info into T24 for individual	2 pieces of ID info	print out documentation for bank account	generate documentation for additional services ↓ manual process that the branch has to do (not on T24)
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