unqork

Sponsor Onboarding for Wealth Management

Efficiently grow your business with a fully digitized advisor onboarding solution.

Highly manual sponsor onboarding processes are incapable of efficiently addressing the demands of plan sponsors and plan providers. "Analog" onboarding processes are inherently slower, more resource-intensive, less transparent, and error-prone than those powered digitally. Digital transformation and innovation, however, is no easy task—particularly in complex and heavily regulated segments such as retirement planning. This is where Unqork's enterprise no-code application platform can be a game-changer.

Unqork's no-code platform comes "out-of-the-box" (or, out of the virtual SaaS box) with all the industry-specific toolsets and elements necessary to build and manage complex enterprise-grade applications (e.g., front end UX, workflow, rules engine, analytics, integrations, and maintenance). Since they're all components of the same unified platform, everything just works together in instant harmony. This means organizations can devote all their resources to addressing business challenges instead of technical ones.

Unqork's **Sponsor Onboarding Solution** empowers plan providers to rapidly build—and effectively manage—a fully digital end-to-end onboarding process for plan sponsors. The Solution seamlessly integrates with internal legacy systems and external third-party solutions. It can automate complex plan information gathering (e.g., plan investment selection) and verification processes, and provide secure document management functionality (document generation, e-signatures, and collaboration).

The result is a scalable, flexible centralized platform that empowers plan providers to bring on new business with machine efficiency. And because Unqork allows you to build and change functionality without having to code, it is easy to incorporate changes driven by business requirements, regulatory needs, or customer demands.

Key Benefits

- **Reduced cost:** Reduce the administrative load by streamlining process and integrations

- **Accelerated onboarding:** Slash the sponsor onboarding process from weeks (and possibly even months) to days or as little as a few hours, resulting in higher productivity and revenue

- **Improved experiences:** Enhance plan sponsor relationships and experience by reducing pain points and providing self-service capabilities

- **Improved decision-making:** Use data analytics to discern insights that can help you improve processes and grow your business over time

- **Reduced risk:** Improved data quality and reduce operational risk with control framework automation.

Key Capabilities

Sponsor-Facing Portal

Sponsor-facing self-service portal to support collecting and validating information

Seamless Integrations

Integrate with TPAs, legal, and other modern or legacy system to digitize processes from end-to-end

Security

A fully secure platform with advanced role-based access and multi-factor authentication

Tailored Dashboards

Dynamically updated internal- and external-facing dashboards empower all stakeholders with process visibility

Secure Document Management

Securely manage, auto-generate, and collaborate on documents including e-signature functionality

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SUCCESS STORY

Using Unqork, a leading retirement provider was able to transform its sponsor onboarding process in only 16 weeks.

A large retirement solutions provider facing long onboarding times, which hampered its ability to bring in revenue. This was the result of costly, high-touch processes that were overly reliant on paper-driven, manual tasks. Using Unqork, the provider developed an end-to-end, digital self-service solution automating complex sponsor onboarding processes in just 16 weeks.

- **Speed-to-market**: The solution went from ideation to production in just 16 weeks
- **Accelerated onboarding:** From 4 weeks on average to just 3 hours
- Reduced operational risk with automated controls and data validation
- Decreased cost of operations and technology ownership
- Improved client relationships and revenue potential

About Unqork

Unqork is the industry pioneer no-code enterprise application platform that helps large companies build, deploy, and manage complex applications without writing a single line of code. Companies like Liberty Mutual, Goldman Sachs, and John Hancock are using Unqork's drag-and-drop interface to build enterprise applications faster, with higher quality, and lower costs than conventional approaches.

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