

# Client onboarding and document collection

Automates new client onboarding by collecting required documents, validating information, and setting up policy records in the agency management system. Reduces onboarding time from days to hours while ensuring compliance.

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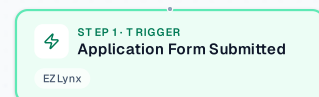


## WORKFLOW TRIGGER

New client completes initial insurance application form

## Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.



STEP 2 · ACTION  
**Send Document Request**  
AgencyZoom EZLynx

STEP 3 · ACTION  
**Collect and Validate Documents**  
AgencyZoom Applied Epic

STEP 4 · DECISION  
**Check Documentation Completeness**  
Applied Epic

STEP 5 · ACTION  
**Create Client Profile**  
Applied Epic AMS360

STEP 6 · ACTION  
**Generate Quote Package**  
Applied Epic EZLynx

STEP 7 · OUTPUT  
**Deliver Onboarding Package**  
AgencyZoom



# Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

## Application Form Submitted

New client submits initial insurance application through agency website or portal. System captures basic client information and coverage requirements.

2

 ACTION

### Send Document Request

Automatically generates and sends personalized document checklist to client based on coverage type. Includes secure upload portal link for required documents.

AgencyZoom

EZLynx

3

 ACTION

### Collect and Validate Documents

Monitors document uploads and performs automated validation checks for completeness and format. Sends reminders for missing documents.

AgencyZoom

Applied Epic

4

 DECISION

### Check Documentation Completeness

Evaluates if all required documents are received and valid. Routes complete applications forward or triggers follow-up for incomplete submissions.

Applied Epic

5

 ACTION

### Create Client Profile

Automatically populates client record in AMS with collected information and documents. Sets up contact preferences and assigns to appropriate

6

 ACTION

### Generate Quote Package

Creates initial policy quotes based on client information and coverage requirements. Prepares welcome package with next steps and agent contact information.

Applied Epic

EZLynx

7

 OUT PUT

### Deliver Onboarding Package

Sends complete welcome package to client including quotes, policy options, and scheduled consultation. Notifies assigned agent that client is ready for policy discussion.

AgencyZoom



### Outputs

- Complete client profile in AMS
- Initial policy quotes
- Scheduled agent consultation



## Key Metrics

- Onboarding completion time
- Document collection rate
- Client conversion rate



## Tools & Integrations

- EZLynx
- AgencyZoom
- Applied Epic
- AMS360



## AI Business OS

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