



EXCELLENCE IN CLIENT ONBOARDING

FOR LEGAL SUPPLIERS ONLY

Following the government's response to the home buying and selling consultation, the direction of travel is becoming clearer; and onboarding, up front and material information is a critical part of this brave new world.

This category specifically recognises the innovative businesses built to help conveyancers (and estate agents in many cases) efficiently, and compliantly onboard home movers. With a range of technology providers, and innovative service-orientated businesses, the winner of this new for 2027 category will offer one/more/all of the following solutions for their clients; material and up front information; ID and know your client (KYC) verification; source of funds; source of wealth; property protocol forms; client care correspondence; client communications.

CRITERIA

The winner of this award must demonstrate over the last 12 months:

- an exceptional product or service which has a demonstrable impact on speed, efficiency and compliance when it comes to onboarding
- continued investment and innovation in their product or service to be "best in class"
- customer service excellence throughout the customer journey
- a positive attitude toward collaboration and integration with other suppliers and law firms
- examples of how their product or service has materially impacted the onboarding experience for end users

Entrants for this category are strongly encouraged to include a case study to support their submission.

