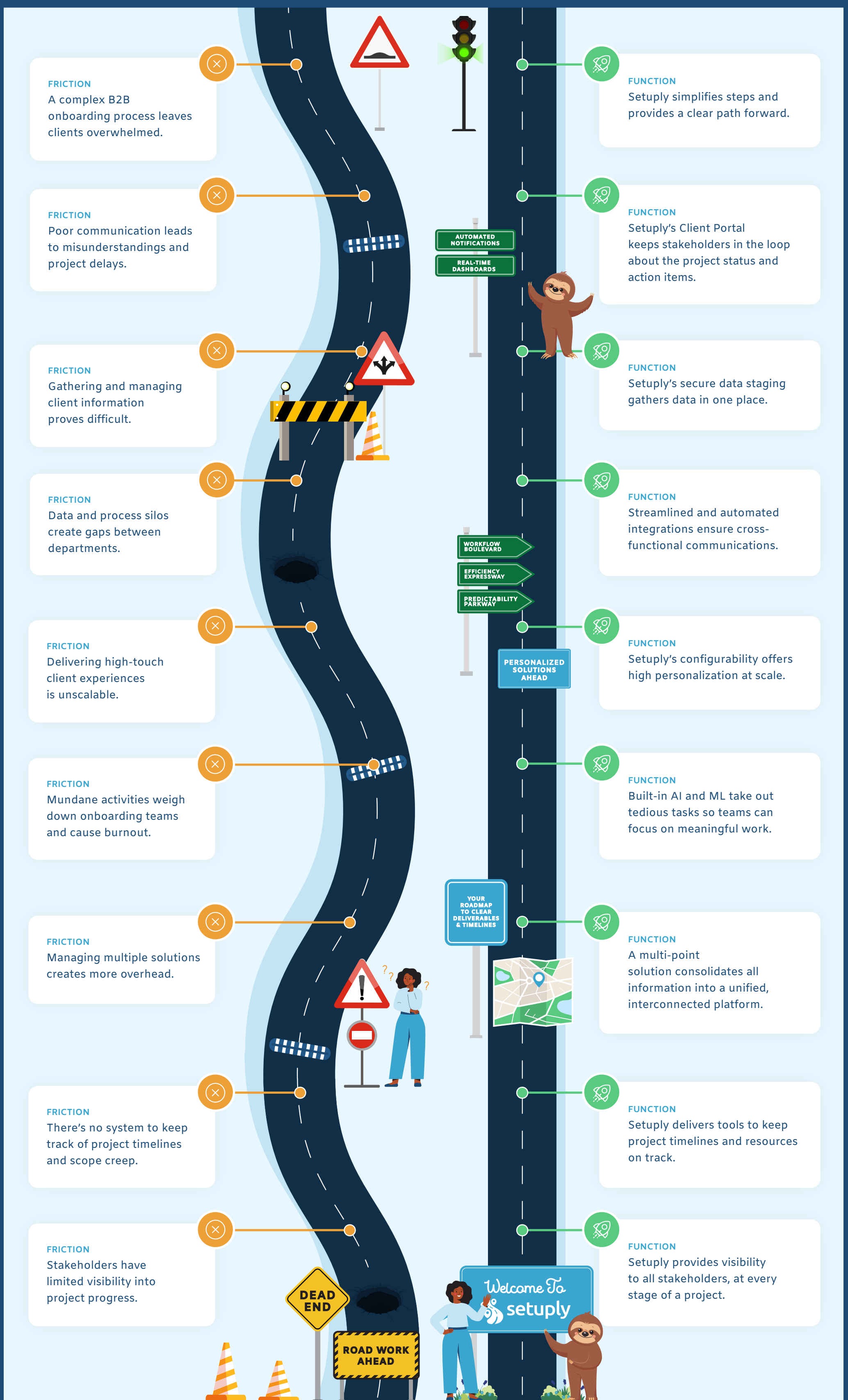# setuply

From Roadblocks to the Fast Lane
Transforming the Client Onboarding Journey

Imagine a future where client onboarding is friction-free. With Setuply, you and your clients are in for a smooth ride every time. Our client onboarding and lifecycle management platform eliminates all-too-common bumps in the road, delivering seamless experiences that set the stage for enduring relationships.

Take a closer look at how Setuply paves the way for a better client onboarding journey.

BEFORE SETUPLY

AFTER SETUPLY

FRICTION
A complex B2B onboarding process leaves clients overwhelmed.

FUNCTION
Setuply simplifies steps and provides a clear path forward.

FRICTION
Poor communication leads to misunderstandings and project delays.

FUNCTION
Setuply's Client Portal keeps stakeholders in the loop about the project status and action items.

AUTOMATED NOTIFICATIONS

REAL-TIME DASHBOARDS

FRICTION
Gathering and managing client information proves difficult.

FUNCTION
Setuply's secure data staging gathers data in one place.

FRICTION
Data and process silos create gaps between departments.

FUNCTION
Streamlined and automated integrations ensure cross-functional communications.

WORKFLOW BOULEVARD

EFFICIENCY EXPRESSWAY

PREDICTABILITY PARKWAY

FRICTION
Delivering high-touch client experiences is unscalable.

PERSONALIZED SOLUTIONS AHEAD

FUNCTION
Setuply's configurability offers high personalization at scale.

FRICTION
Mundane activities weigh down onboarding teams and cause burnout.

FUNCTION
Built-in AI and ML take out tedious tasks so teams can focus on meaningful work.

YOUR ROADMAP TO CLEAR DELIVERABLES & TIMELINES

FRICTION
Managing multiple solutions creates more overhead.

FUNCTION
A multi-point solution consolidates all information into a unified, interconnected platform.

FRICTION
There's no system to keep track of project timelines and scope creep.

FUNCTION
Setuply delivers tools to keep project timelines and resources on track.

FRICTION
Stakeholders have limited visibility into project progress.

FUNCTION
Setuply provides visibility to all stakeholders, at every stage of a project.

DEAD END

ROAD WORK AHEAD

Welcome To setuply

Turn the corner to frictionless client onboarding.

Setuply's all-in-one platform powers up every aspect of your onboarding so you can deliver exceptional, scalable experiences. Experience its power firsthand.

REQUEST A DEMO