

Customer Onboarding

OPPORTUNITY-TO-LEAD (O2L) \ SOLUTIONS FOR SALES AND GO-TO-MARKET

Streamline customer onboarding with Rimini Agentic UX™

The Rimini Agentic UX Solution for Customer Onboarding — deployed over the top of existing ERP software from Oracle, SAP, Microsoft, Infor and others — simplifies the onboarding of new customers with required data, validations and approvals. The solution uses automated form submission workflows, AI assistance and centralized tracking to optimize the process.

For many organizations, the customer onboarding process is hindered by inefficiencies, errors and communication gaps. The approach is often highly manual, relying on paper-based forms and email-driven workflows that require significant administrative effort and close coordination between teams, leading to frequent mistakes and delays.

Quickly deploy an intelligent, AI-enabled onboarding process

Since the Rimini Agentic UX Solution, Powered by ServiceNow®, overlays existing ERP software without any requirement for ERP upgrades or migrations, organizations can deploy the solution fast — and quickly drive real, measurable results and value.

The process will:

- **Accelerate** data entry through AI-guided form filling that reduces errors and manual effort
- **Trigger** automated follow-ups to drive timely action and tighter team collaboration
- **Enforce** standards with AI-powered validation to ensure every form meets requirements
- **Integrate** workflows to enable seamless, cross-department collaboration from start to finish
- **Unlock** instant visibility into form progress, approvals and compliance

About Rimini Agentic UX™ Solutions

Rimini Agentic UX Solutions help make running ERP processes better, faster and cheaper. This intelligent, AI-driven user engagement layer is deployed over the top of existing ERP systems and releases, enabling a modern user, role and persona-based experience and automating workflows that leverage AI agents — without the unnecessary cost, risk and time required with ERP software upgrades and migrations.



CLIENT SPOTLIGHT

A leader in property development in Malaysia had no centralized system for customer onboarding, resulting in a lack of transparency and follow-up, impacting customer satisfaction and operational scalability.

The Rimini Agentic UX™ Solution for Customer Onboarding is designed to be deployed over the top of the client's existing SAP ECC 6 release without any upgrades or migrations, automating manual tasks and notifications for timely follow-ups while centralizing form submissions for real-time visibility.

With this solution, the client anticipates a significant reduction in manual communication, data entry errors and onboarding time, enabling faster service delivery and higher customer satisfaction.



Faster customer onboarding and activation

AI-guided forms and automated workflows accelerate onboarding, enabling quicker customer service delivery



More accurate customer data

Structured fields and validations ensure clean, complete records, reducing rework across onboarding steps

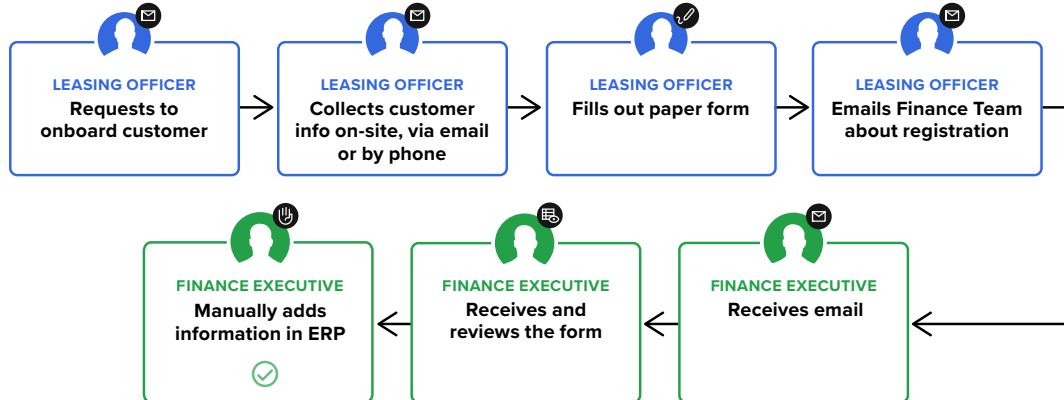


Improved transparency and experience

Centralized submissions and real-time tracking improve visibility, collaboration and customer satisfaction

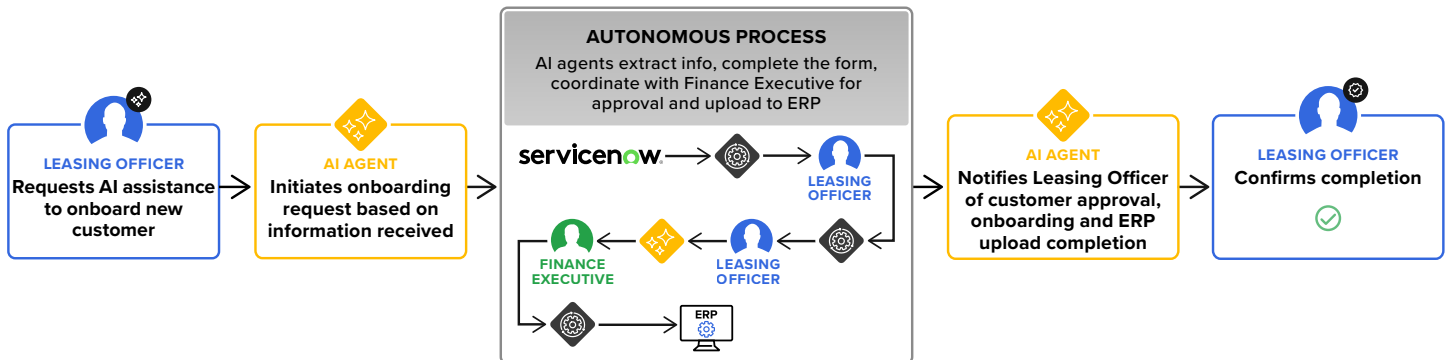
BEFORE: Traditional resource-intensive process

- Status tracking: **0% visibility***
- Onboarding cycle: **15–25 hours***



AFTER: Intelligent Rimini Agentic UX™ workflow automation

- Status tracking: **100% visibility***
- Onboarding cycle: **5–8 hours***



*Estimate

servicenow AI Platform Tools

- App Engine
- AI Agent Studio
- Flow Designer
- Service Catalog
- Employee Center
- ERP Canvas/Zero Copy Connector

Solution Benefits

- **Enhanced user experience:** AI-assisted ServiceNow UX for relevant personas
- **Automation:** Smart workflow for customer form submission, automated data entry and AI-assisted data validation
- **AI capabilities:** AI-powered form completion, validation and recommendation
- **Stronger governance:** Real-time dashboards and audit-ready tracking
- **Greater visibility:** Centralized system for tracking form progress, automated notifications and persona-specific views for status

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