

# Intake Changes!



## Background

The Oversight team is piloting a simpler [investment intake](#) process to replace the existing ITPA intake form. Hooray!



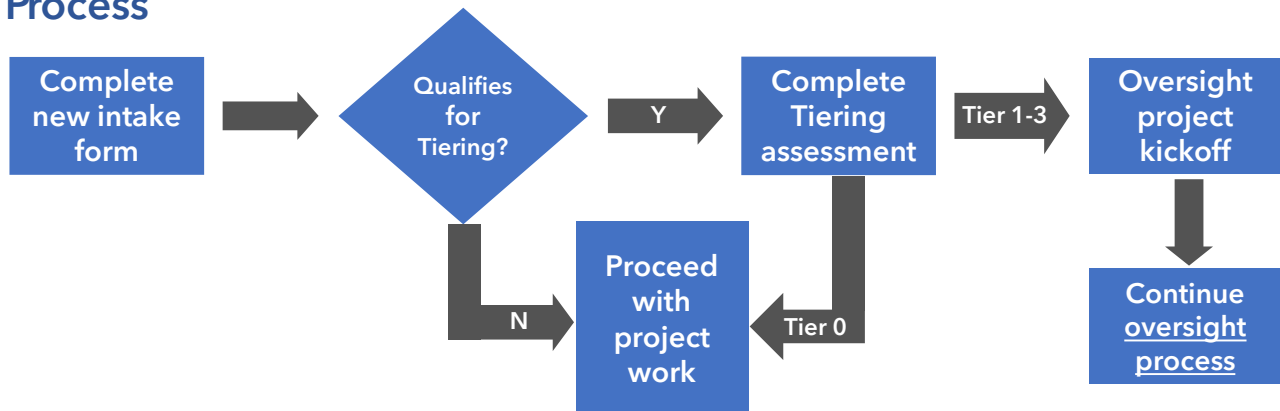
## Why change? Why now?

We've simplified the intake process to minimize customers filling out lengthy questionnaires which may not be relevant. Now, the intake form is shorter and further details are only filled out as-needed.

This is in support of our continuous improvement efforts to make the Oversight process more streamlined, consistent, and human-centered.



## Process



## Impact

- Experience: shorter simpler intake form; tiering assessment filled out only when needed.
- Links: the ITPA form is no longer available - please update your bookmarks with the new form linked above.



## Exciting! What's Next?

- Refine intake model based on pilot learnings & feedback - ongoing through December 31
- Awareness video on intake + tiering - mid December
- Lean coffee connect on intake + tiering - early January



## Questions?

Email us [here](#).