



Appian for Financial Services

CUSTOMER TRANSACTION LIFECYCLE MANAGEMENT

- Create customer records that act as a single source of truth for all interactions, across the organization
- Integrate with legacy systems to surface data and inform service offerings
- Reduce email and eliminate paper processes
- Manage requests across channels, products and stakeholders – internal and external

Financial services institutions (FSIs) can struggle with siloed legacy systems and back-end data issues that hamper the ability to streamline processes and improve efficiency. Overcoming this obstacle is paramount to building loyal relationships with customers who expect to be served in the easiest and fastest manner.

Successful FSIs will focus on improving all facets of the relationship with the customer, and managing those relationships through events, not just transactions.

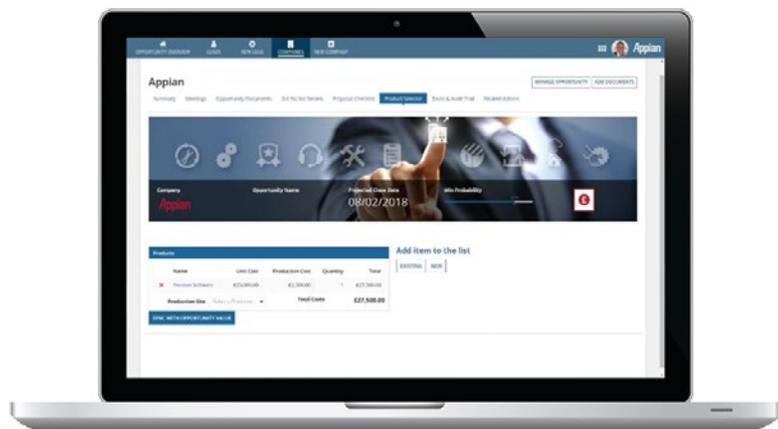
To achieve this, FSIs should use data to proactively identify opportunities to achieve better outcomes for customers. This data-informed view will enable a deeper understanding of customer trends at a macro level, while simultaneously driving unique service offerings to the individual customer.

MEET THE CHALLENGE

Break down operational processing silos and better serve your customers with Appian's unified platform. This customer-centric approach helps increase customer satisfaction and value by enabling a consistent and seamless experience throughout the event lifecycle.

Improve customer transaction lifecycle management through:

- **A single source of truth.** Data is consolidated for a unified view to simplify the many customer interactions across the institution—including on-boarding, account servicing, complaints, collections, acquisitions, and back-office processes.
- **Data-driven insights.** Deliver personalized care through proactive recommendations that correlate with life-changing events and are designed to improve the customer's financial health.
- **Comprehensive audit trails.** Minimize monetary and regulatory risk with a full audit history of processes across multiple businesses and geographies.



Customer Transaction Lifecycle Management

FOCUS

Don't just meet, exceed customer expectations with a customer transaction lifecycle management application that allows you to:

- Enhance your employee experience by reducing email and paper processes
- Orchestrate interactions across internal and external stakeholder groups
- Reduce costs and risk with controlled execution and effective audit trails

TAKE CONTROL

Quickly build, deploy, and scale customer services initiatives with enterprise solutions, including:

- Customer On-Boarding Coordination
- Customer Reporting Oversight
- Dispute, Complaint and Chargeback Management
- Contact Center Automation

PREPARE FOR THE FUTURE

Pressure is mounting to deliver innovation in financial services.

It takes speed and power to deliver transformational solutions. The Appian low-code application platform provides both, while leveraging your legacy IT investments

With Appian, financial institutions can build web and mobile apps faster, run them on-premises or in the cloud, and manage complex processes, end-to-end, without limitations.

LEADING ORGANISATIONS TRUST APPIAN:



Realize the benefits of Appian to transform your customer's journey.

Learn more at: [appian.com/finserv](https://www.appian.com/finserv)

Appian

Appian provides a leading low-code software development platform that enables Financial Services Institutions to rapidly develop powerful and unique applications. The applications created on Appian's platform help companies drive digital transformation and enables competitive differentiation.

For more information, visit www.appian.com