



Appian for Financial Services

CONTACT CENTER AUTOMATION

- Deliver financial services transparently across digital channels
- Automate and streamline work, enabling faster processing times
- Gain a single, contextualized view of the customer
- Improve handling of complex issues for first call resolution

Customer expectations are constantly changing. Financial services customers demand a fast, seamless, personalized experience from their financial services institutions (FSIs), one that not only satisfies, but anticipates their needs. Meeting these needs can pose significant challenges for FSIs who are often burdened with a backdrop of heavily customized legacy core systems, significant merger and acquisition activity, and an ever-changing regulatory landscape. In this environment, many customer service technology ecosystems have grown increasingly complex, severely limiting their ability to provide customers with the experience they demand.

How can financial institutions cultivate relationships that create loyal, engaged customers?

FSI leaders are creating and maintaining a culture focused on the experiences of everyone they touch — their customers, employees, business partners, and regulatory agencies. This can be achieved with contact center technology built on multichannel support and event-driven case management that enables first call resolution and decreases rework, resulting in improved customer experience.

MEET THE CHALLENGE

With Appian, exceptional customer service is a reality. Powered by seamless multi-channel integration and automation, Appian enables financial institutions to work across legacy silos and deliver fast—whether they need to connect, extend, or replace components of the call center environment. Appian makes it possible to quickly modernize customer contact capabilities and provide call center representatives with a unified, 360-degree view of the customer, freeing up agents for more challenging support issues; like changing fees, initiating account level changes, and exception resolution.

Improve customer engagement and contact center excellence, through:

- **Personalized customer experience.** Stay competitive with a forward-looking digital transformation strategy that allows you to redefine the customer experience from start to finish.
- **Seamless omni-channel engagement.** Achieve a seamless customer experience across an ever-broadening scope of communication channels.
- **Automation for agents.** Case Management integrated with Artificial Intelligence (AI), Machine Learning (ML), Robotic Process Automation (RPA), and other emerging technologies empowers human agents to deliver intelligent and exceptional customer service in real-time.



Contact Center Automation

FOCUS

Don't just meet, exceed your customer expectations with an automated contact center application that allows you to:

- Deliver a consistent and exceptional experience, across all channels
- Empower agents to deliver contextual, personalized resolutions
- Reduce average handle time (AHT) and hold time and improve first call resolution (FCR)

TAKE CONTROL

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

- Customer On-Boarding Coordination
- Customer Transaction Lifecycle Management
- Dispute, Complaint and Chargeback Management

PREPARE FOR THE FUTURE

Pressure is mounting to deliver innovation in the financial services sector.

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 ORGANIZATIONS TRUST APPIAN:



Realize the benefits of Appian to transform your operations and build an intelligent customer engagement center. Learn more at: 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