

## Appian for Financial Services

### CUSTOMER ON-BOARDING COORDINATION

- Integrate disparate data sources and enable a client-centric approach
- Automate and streamline work by eliminating silos
- Monitor performance metrics to drive continuous improvement
- Enforce compliance and generate an audit trail to assure quality

Delivering a completely satisfying experience during the on-boarding process is a prerequisite to maximizing the lifetime value of customer relationships.

Financial services is all about effectively and efficiently managing enduring relationships. The key to competitive advantage is the ability to provide offerings for your customers that can be quickly, cost effectively configured to their requirements and needs—both during the initial on-boarding process and then throughout the customer lifecycle. Significant challenges along the way include siloed divisions, inflexible legacy technology and manual processes, in addition to intense pressure on cost reduction amidst increasingly dynamic regulatory environment.

*What, if you could surprise and delight customers during the on-boarding process?*

Forward thinking institutions are deploying a customer-centric approach to on-boarding that spans across information capture, identification, verification and fulfillment for multiple products and transactions.

#### REIMAGINE THE CUSTOMER JOURNEY

With an integrated unified digital platform, proven security and a powerful and intuitive interface, you can address all on-boarding challenges.

- **Achieve a comprehensive view of customers**, fostering personalized configurations enabling up-sell and cross-sell.
- **Increase productivity and efficiency** with improved oversight, accountability for decision making, and staff effectiveness.
- **Implement holistic compliance** by incorporating new regulations and data sources into on-boarding processes.
- **Integrate legacy systems** and disparate data sources into one comprehensive customer view to manage diverse on-boarding cases.
- **Automate key processes** and eliminate repapering to reduce costs and be more flexible to the changing on-boarding needs.



### FOCUS

Deliver key capabilities for effective Customer On-boarding with an automated approach to customer service.

- Manage basic cases and more complex scenarios within the same process
- Create comprehensive views across events, departments, products and regions
- Conduct ongoing screening with reasonable review and escalation of exception cases

### TAKE CONTROL

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

- Customer Reporting Oversight
- Customer Transaction Lifecycle Management
- Dispute, Complaint, and Chargeback Management
- Contact Center Automation

### 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, organizations 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:



## 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](http://www.appian.com)