

Appian for Financial Services

DEAL INITIATION AND REVIEW

- Coordinate tasks across multiple internal and external stakeholder groups
- Gain visibility of critical data, processes, deals and final decisions
- Secure deal-specific information and ensure complete audit trails
- Track and manage investment activities with an integrated dashboard

Financial firms require in-depth deal information for accurate deal assessments. As firms evaluate emerging opportunities, from new investment to acquisition, and the extension of service offerings for new or existing customers, traditional inflexible technology approaches are quickly rendered ineffective.

The challenge is to provide senior leaders across key functions—product management, operations, legal, sales, IT, risk, and finance—with a clear view of new economic opportunities, while ensuring secure access to sensitive information, transparent decision making, and complete audit trails.

By automating manual processes and connecting disparate data sources and legacy systems to an integrated digital transformation platform, firms can achieve a clear view of the deal at hand across channels, regions, and products, and enable staff for collaboration, assessment, and quick action.

DEPLOY A FLEXIBLE DIGITAL OVERLAY

Manage the end-to-end process from deal initiation, through review, configuration, and approval with the Appian digital platform.

- **Drive faster decisions for superior top-line performance.** Quickly deploy applications, and adapt to changes instantly with the low-code approach of Appian.
- **Achieve a comprehensive and integrated view.** Gain a full audit history of risk processes across multiple businesses and regions.
- **Centralize data and processes across core assets.** Manage deals, funds, and investors' information via a simple intuitive interface.
- **Improve productivity and efficiency.** Appian's easy to build and change rules enable collaboration and process coordination across functions, lines of business and regions.



CASE STUDY

Business Challenge:

This leading global investment firm manages large complex deals and routinely evaluates new opportunities. With offices in 16 countries and \$150 billion in assets, the firm works closely with investors to provide innovative financial solutions and investment vehicles. The environment included multiple systems of record, spreadsheets, and manual workflows, leading to disparate views across data, a lack of collaborative decision-making, and inadequate security measures. Senior leaders had three distinct goals: 1) achieve clear visibility across silos of information, 2) simplify due diligence processes, and (3) speed decision-making and outcomes.

Appian Solution:

The Appian solution manages all deals with a unique 'Deal Code' tracking mechanism. The entire process is automated from the initial Deal Code generation to tracking, management and reporting (by invoice, expense type, fund, etc.). The power of Appian Records enables centralization of all data and processes, providing clear visibility across core assets, including Deals, Funds, Portfolios, and Investors. By deploying Appian's innovative technology, the firm has successfully created a sustainable pace of innovation with cloud and mobile capability that position it as a leader in digital transformation.

FOCUS

Focus your efforts to meet deal initiation and review challenges. With Appian, you can:

- Assure tight coordination of timelines and deliverables
- Manage basic deals and more complex scenarios within the same process
- Secure deal specifics on a need-to-know basis
- Create end-to-end process views across events, departments, products and regions

TAKE CONTROL

Quickly build, deploy, and scale new business initiatives with enterprise solutions for:

- Product Hub 360 view
- Campaign Management
- Marketing Content Management
- Product Launch Management
- Sales Automation and Management

PREPARE FOR THE FUTURE

Pressure is mounting to deliver innovation in the financial services capital markets 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