

Appian for Financial Services

OMNI-CHANNEL CASE MANAGEMENT

- Deliver actionable insight into customer financial needs anytime, anywhere
- Create consistent, seamless experiences across channels
- Enable personalized advice, products and services
- Unify digital and physical customer journeys seamlessly

Customer expectations for banking services are constantly growing and evolving. Today's connected customer expects their financial institution to meet or exceed the digital experiences they encounter daily from technology giants like Google, Amazon®, Facebook®, and Apple®.

How do leading financial institutions differentiate themselves to delight their customers, gain competitive advantage, and recover market share?

To deliver on the promise of true omni-channel, dynamic case management, that provides a 360-degree view of the customer, the customer experience objectives must be focused on simplicity, ease, and responsiveness — not on cross-selling and cost cutting.

MEET THE CHALLENGE

Break down operational processing silos and better serve your customers with fast and easy processes delivered on the device and channel your customers prefer, using Appian's unified platform. This customer-centric approach helps improve profitability and create sustainable competitive advantage.

Improve omni-channel case management through:

- **Unified data and process** to empower contextual, immediate action by serving and consuming data to and from external systems.
- **Easy to use, low-code application** for accessibility across all customer facing applications (mobile, call center, branch, ATM).
- **Consistent, seamless integration**, supported by appropriate and relevant information across channels and products.
- **Convenient, always-on and available instant access** that customers demand for informed purchases and service impressions.



FOCUS

Don't just meet, exceed customer expectations with an omni-channel case 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 banking business operations initiatives with enterprise solutions, including:

- ATM Management
- Card Operations Management
- Corporate Actions
- Legal Entity Lifecycle Management
- Investment Operations Help Desk

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.

LEADERS IN FINANCIAL SERVICES TRUST APPIAN:



Realize the benefits of Appian for case management across every channel.
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