Appian

Appian for Financial Services and Insurance
PENSION SERVICING AND ADMINISTRATION

> Provide visibility across customer, employee, and contract records

> Increase pension servicing efficiency and reduce operating costs

> Automate manual, paper-based administration processes

> Improve customer service and increase sales opportunities

For many pension providers, siloed legacy systems and paper-based processes are a barrier to providing an optimal customer experience. Additionally, these inefficient, manually intensive back-office processes adversely impact operating costs.

Pension administration services are highly client response-driven. Service representatives in customer call centers, along with plan advisors and brokers, have a myriad of tasks that they need to accomplish to service their customers, including record keeping, communication, documentation storage, and financial transaction services.

And ultimately, pension providers need to look down the path of customer self-service.

With so many competing priorities, what is the best path for pension providers to take so they can better service the portfolio of business; both now and in the future?

MEET THE CHALLENGE

Leading providers are embracing a platform-based solution that can meet the needs of each stakeholder in the pension ecosystem — including all of the maintenance and communications related to administering pension plans — with a comprehensive view of all data to enable increased service levels.

Appian enables pension providers to leverage their existing core systems, external databases, and spreadsheets into a comprehensive and cohesive application that delivers digital efficiency and provides an optimal experience for all users.

With the Appian low-code platform, pension providers can:

- Simplify operations with a single application that enables role-relevant views for back office, front office and external constituents

- Eliminate the need to maintain separate systems across both call centers and back office operations

- Improve service levels by enabling a holistic view of the customer, so advisors can respond to inquiries faster and more accurately

- Roll out self-service capabilities, reducing the burden on call center staff and addressing changing customer expectations

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FOCUS

Transform your business processes to become a connected company in the digital world.

- Eliminate back-office inefficiencies with rapid digital innovation

- Converge all relevant data into a single view to improve and speed decision-making

- Improve the customer experience to increase customer loyalty

TAKE CONTROL

With Appian, you can quickly build, deploy and scale Financial Services and Insurance (FS&I) customer operations solutions, including:

- Pension Scheme Changes and Asset Transition

- Pension Operations Structured Settlements

- Contact Center Automation

- Customer Self-Service

PREPARE FOR THE FUTURE

The digital world is faster, smarter, and more connected, and FS&I companies need a platform to adapt to the new pace of change.

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:

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Appian provides a leading low-code software development platform that enables Financial Services and Insurance 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