



## Appian Connected Onboarding and Connected Servicing Solutions

### **Fast, efficient, and connected customer experience will make or break banks in the age of AI.**

In the financial services industry, competition to win and retain customers is fiercer than ever. But slow service and a complex onboarding process put institutional clients and revenue at risk. To stand out, you need a new generation of connected solutions that reduce operational risk and deliver a better customer experience.

That's why the world's top financial services institutions rely on Appian for AI-powered process automation. Appian orchestrates and automates customer lifecycle management (CLM) end to end, including customer onboarding, Know Your Customer (KYC), and servicing workflows. Chartis recognized Appian's suite of CLM solutions as a "Category Leader" in its [Vendor Analysis: Client Lifecycle Management Solutions, 2022: Corporate and Investment Banking report](#) because of our "built-for-purpose workflow, automation techniques, and policy management tools."

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**State Street streamlined customer onboarding and accelerated time to revenue by 20% with Appian, realizing a 30% gain in operational efficiency and reducing losses by 50%.**

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### **Simplify, accelerate, and modernize onboarding and servicing.**

With Appian Connected Onboarding and Connected Servicing solutions, you can transform the customer journey, from seamless onboarding to streamlined transactions, by harnessing the power of intelligent document processing (IDP), robotic process automation (RPA), and artificial intelligence (AI). Appian's cutting-edge technologies guide users through a seamless CLM journey, eliminating unnecessary obstacles while accelerating decision-making processes.

By leveraging your existing systems and data, Appian offers full transparency into onboarding and servicing processes, empowering users to take informed action with real-time insights at every step. Say goodbye to friction and hello to seamless onboarding and servicing experiences.

For more than a decade, Appian has helped the world's largest financial services institutions solve critical challenges with a platform that comes with conveniently prebuilt templates and integrations that offer a customizable, client-centric approach to CLM. And, with Appian's visual drag-and-drop tools and versatile data fabric, IT teams can quickly build and update sophisticated applications that connect disparate systems across the organization for a complete 360-degree view of the customer journey.



**Appian is a specialist in the provision of CLM capabilities to the commercial and investment banking market, and its built-for-purpose workflow, automation techniques, and policy management tools were all considered by Chartis to be particular strengths. These factors are reflected in its Category Leader status in the Chartis CLM RiskTech Quadrant for investment banks and markets solutions.**

Phil Mackenzie, Research Principal at Chartis.

## Transform the customer journey with connected, automated, easily customizable solutions.

### Process Configuration

Enable business users to quickly configure and customize the onboarding process to meet customer requirements on the fly without having to rely on IT.

### Connected Experience

Build and extend user interfaces and workflows on top of built-in data models and business rules. Gain agility with intuitive data collection processes and fast, easy integrations with data sources, including CRMs.

### Intelligent Automation

Maximize workflow efficiency and unify people and technology with end-to-end process automation across AI, IDP, RPA and API integration. Connect people, systems, bots, AI, and business rules to meet your business goals faster.

### Secure, Self-Service Client Site

Manage client requests directly. Enable end users to create service requests, upload documents, and review the status of open items.

## Customizable solutions built for financial institutions.

With Appian Connected Onboarding and Connected Servicing solutions, you can:

- **Customize onboarding on the fly:** Enable business users to quickly configure and customize the onboarding process to meet customer requirements on the fly without having to rely on IT.
- **Rapidly build user interfaces and integrate data:** Build and extend user interfaces and workflows on top of built-in data models and business rules. Gain agility with intuitive data collection processes and fast, easy integrations with data sources, including CRMs.
- **Boost efficiency with end-to-end automation:** Maximize workflow efficiency and unify people and technology with end-to-end process automation across AI, IDP, RPA, and API integrations. Connect people, systems, bots, AI, and business rules to meet your business goals faster.
- **Empower end users:** Enable end users to create service requests, upload documents, and review the status of open items via a secure, self-service client portal.

In the financial services industry, nothing's more important than attracting and retaining satisfied customers. And today's customers are choosing to do business with organizations that bridge the gap between technology and trust with digital speed and convenience. Appian's Connected Onboarding and Connected Servicing solutions can be that bridge.

**Contact us today to explore the possibilities and see a live demo of the Appian Connected Onboarding and Connected Servicing solutions.**

## Trusted by leading Financial Services institutions.

ALLAN GRAY

 CME Group

 Invesco

 Nasdaq

 STATE STREET