



Appian Portals for Retail Banks

Key challenges.

Most banks have a fairly robust strategy for using personalized data to serve existing customers. However, open banking and fintech competitors are becoming more ubiquitous, making it difficult to provide a seamless customer experience—especially when attracting new customers.

Retail banks that focus on early prospect engagement and evolving customer needs can gain a competitive edge in the market to stay ahead, including:

- **Easy self-service:** Prospects and customers expect to be able to interact with your business anytime, anywhere. Online portals offer a seamless experience that makes it easy for potential customers to explore your offerings.
- **Seamless onboarding:** Complicated processes can discourage potential customers from opening accounts or using services. Platforms that focus on process automation can help streamline account creation to provide a faster, more fluid onboarding experience.
- **Personalized products and marketing:** Customer needs are changing constantly and quickly. Digital banking solutions, personalized investment options, or niche offerings tailored to specific customer segments can address evolving demands.

Solution.

Engage prospective customers with Appian Portals.

Appian Portals makes it easy to create public interfaces that improve prospect experiences, boost engagement, and create loyal customers.

The portals you build with Appian securely connect to your internal processes and data, allowing users to take actions without creating an account, like exploring offers, requesting more information, or submitting applications.

And with low-code, a portal can be designed, published, and managed faster and more securely than with traditional web development.

- Rapidly build engaging public websites with low-code.
- Update web experiences with lightning-fast agility.
- Ensure enterprise security.

Every portal built using the Appian Platform inherits the security of the platform itself, so your public websites are more secure than if they were built with traditional web development.

Use cases.

Credit card offers.

Whether they want to find a better rate or compare various card products based on rewards or annual fees, a portal is the best way to present credit card offers to prospects.

Loan/Mortgage applications.

While shopping for personal loans, prospects can quickly share basic information and see lending products without creating an account. If a user decides to apply, the information they've entered is automatically brought into their new account.

New product launch.

Quickly capture interest and feedback from prospects during new product and service launches to start engaging right away.

Why Appian Portals?

Quickly build secure public websites that connect people and processes.

Use visual low-code design tools to create scalable and secure self-service experiences for potential customers, providing seamless interactions that don't require an account.

- **Connect with prospects.** Easily design engaging and intuitive experiences that securely connect your audiences to your institution's workflows without requiring them to log in.
- **Accelerate development.** Use low-code to build integrated, custom portals faster than with traditional development methods.
- **Streamline management.** Design, publish, and manage custom portals easily with an intuitive user experience that connects to your existing workflows and data.
- **Improve security and compliance.** By leveraging the security of the Appian Platform, you'll be covered on a number of fronts, including SOC 2 compliance, encryption, and data security.

**Leaders in financial
services trust Appian.**

ALLAN GRAY

 **CME Group**

 **Nasdaq**

 **STATE STREET**

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Appian is a software company that automates business processes. The Appian AI Process Platform includes everything you need to design, automate, and optimize even the most complex processes, from start to finish. The world's most innovative organizations trust Appian to improve their workflows, unify data, and optimize operations—resulting in better growth and superior customer experiences. For more information, visit appian.com. [Nasdaq: APPN]