

## Appian + RSM FI OnboardAssist

Onboarding automation for regional and community banks.

Navigating the ever-changing landscape of compliance and client demands often feels like a relentless uphill climb. Regional and community banks seek stability, but managing pressing issues, investing in digital transformation, and sustaining company growth can generate unpredictability. It all adds up to difficult decisions requiring you to take a step back from the day-to-day responsibilities of running the bank to focus on finding the best financial course forward. The challenge of customer onboarding will continue to intensify as economic conditions and market fluctuations remain uncertain.

Off-the-shelf software solutions don't adequately address the high risk of non-compliance and loss of revenue inherent in the onboarding process. A lack of process orchestration, poor visibility into operational workflows, and an inability to adapt to rapidly changing corporate and regulatory environments are leading factors for onboarding challenges. And if you continue to rely on manual processes, the onboarding experience will fall short of the expectations of modern customers.

This makes onboarding a prime opportunity for financial institutions to differentiate themselves. RSM and Appian have partnered to offer a solution that allows banks to quickly update and modernize their processes to beat the most common onboarding struggles. RSM FI OnboardAssist combines a spectrum of leading process, data, automation, and AI technologies to unify data, modernize processes, resulting in an enhanced customer experience.

### Remain nimble in the face of economic and regulatory change.

Many regional and community banks have trouble quickly adapting to economic fluctuations and changing regulations because of outdated, limited resources and legacy systems. Here's how this can hold regional and community banks back:

- Slow, inflexible systems exaggerate inefficiencies in manual processes.
- Ever-changing regulations with looming deadlines increase compliance costs.
- Big banks investing heavily in cutting-edge technology causes customer expectations to grow and may lead to banks that don't invest falling behind.
- Organizational and data silos make it hard to fully understand your customers and operations.



This solution can be implemented by regional and community banks in under 8 weeks while utilizing fewer staff resources in the implementation process. In turn, the banks boost efficiency, reduce expenses, augment flexibility, capture market share, increase customer spending and simplify business transactions. This empowers financial institutions to concentrate on their highest priority: their customers.

Abdul Mohamed, Intelligent Automation Practice Leader, RSM US LLP



Through our combined global technology footprint and industry expertise, Appian and RSM US LLP have extensive experience in optimizing customer experiences with seamless onboarding and streamlined transactions. Together, we're committed to deliver beyond onboarding, with modern customer lifecycle management solutions that boost business productivity and deliver cost savings.

John Trapani, Industry Leader, Financial Services, Appian

RSM and Appian's low-code automation platform gives regional and community banks a competitive advantage by:

- Delivering a **superior customer experience** with increased process efficiency, improved accuracy, and more personalized interactions.
- **Increasing transparency** into processes so all stakeholders can see required tasks, ownership, status, due dates, and more in a single view.
- **Reducing manual data entry** across systems with integration and workflow automation for both employees and customers.
- **Enhancing operational efficiency** so banks can deliver results to clients faster, quickly respond to market demands, and remain competitive.
- Quickly **scaling value** to address other use cases through repeatable modules, established templates, and low-code development.

### **Appian + RSM: better together.**

The Appian Platform empowers you to seamlessly integrate disparate systems, providing a holistic view of customer data and modernizing your onboarding processes. Partnered with RSM, a leading provider of professional services to financial institutions, Appian delivers unparalleled solutions and support globally. Together, they empower clients with innovative technology and strategic insights to thrive in a dynamic business landscape.

RSM serves over 3,300 financial institutions and specialty finance companies nationwide and is a leading provider of assurance, tax, and consulting services. They guide clients through today's complex business environment by understanding their needs and bringing together the right teams to address them.

Through our combined global footprint and industry experience, Appian and RSM are dedicated to delivering unparalleled solutions and support to our customers worldwide. We leverage our extensive presence across diverse markets and deep understanding of community banks to drive innovation, foster growth, and empower our clients with cutting-edge technology and strategic insights. We're committed to transforming businesses, optimizing operations, and delivering exceptional value to ensure our customers thrive in an ever-evolving global landscape.

**Unlock the power of frictionless onboarding, compliance, and customer lifecycle management today. [Learn more.](#)**



RSM is the leading provider of professional services to the middle market. The clients we serve are the engine of global commerce and economic growth, and we are focused on developing leading professionals and services to meet their evolving needs in today's ever-changing business landscape. Our purpose is to instill confidence in a world of change, empowering our clients and people to realize their full potential.

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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](https://appian.com). [Nasdaq: APPN]