Appian

Corporate Customer On-Boarding and Account Management
THE KEY TO STAYING COMPETITIVE IN COMMERCIAL BANKING

> **❯** Integrate multiple data sources and drive a client-centric approach

> **❯** Automate and streamline work, while reducing organizational silos

> **❯** Capture & monitor performance metrics to drive continuous improvement

> **❯** Enforce compliance and generate an audit trail to assure quality

Commercial banking is all about relationships. The key to competitive advantage is the ability to provide products and services for your corporate customers that can be quickly and cost effectively configured to their requirements and needs — during the initial on-boarding process and then throughout the customer lifecycle.

There are significant challenges along the way:

• Silo'ed divisions with insufficient communication and collaboration

• Inflexible legacy technology systems and data trapped in point solutions

• Manual processes and paper not easily tracked or optimized

• Intense pressure on cost reduction amidst increasingly complex regulatory environment

Delivering a thoroughly satisfied experience during the on-boarding process is a prerequisite to maximizing the lifetime value of the relationship. This is where the journey begins… and could potentially end, if done haphazardly.

What, if you could surprise and delight your customers during the on-boarding process?

single integrated platform

Your Customer Journey… reimagined
Your institution cannot generate revenue until assets are fully transferred, hence flawless on-boarding is a necessity. Now you can take a fully customer-centric approach to corporate on-boarding that spans across information capture, identification, verification and fulfillment for multiple products and transactions. Then track and speed movement of new account opening and manage relationships throughout the life of the customer.

Enter Appian.
With a single, unified digital platform, proven security and a powerful and intuitive interface, you can address your on-boarding challenges:

• **Integrate processes and various data sources.** Appian assembles customer facts from all internal and external information sources into one comprehensive view of the customer – and Appian's easy to build and change rules guide staff through decision criteria to manage simple and complex on-boarding cases.

• **Implement holistic compliance.** Address the relentless pressure to incorporate and implement regulatory compliant solutions. Appian technology is fully capable of integrating new regulations and data sources into customer on-boarding processes.

• **Automate key processes.** Reduce non-productive time and optimize resource allocations by eliminating paper tasks and spreadsheets. Streamline processes to reduce costs and become more flexible to changing on-boarding needs.

• **Eliminate Repapering.** Eliminate redundant 'repapering' for managed accounts program due to change in banking rules or regulations.

• **Achieve a comprehensive view.** The Appian unified platform fosters personalized configuration, as well as enables upsell and cross-sell of products and services.

• **Increase productivity and efficiency.** Appian delivers a single, unified and consistent interface on all devices, and in a mobile environment. Enable improved oversight, accountability for decision making, and staff effectiveness in executing complex or large scale on-boarding efforts.

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FOCUS YOUR EFFORTS

Focus your efforts to meet the customer on-boarding challenge. With Appian, you can:

- Manage basic cases and complex scenarios within the same process

- Create comprehensive views of customers across multiple events, across lines-of business and geographies

- Review and drive efficient escalation of exception cases

TAKE CONTROL

Take control of performance with the Appian digital platform, a powerful yet easy to use platform for managing complex business processes. Quickly build and deploy enterprise apps for:

- Customer Acquisition
- KYC and AML Compliance
- Customer On-boarding
- Product Management
- Business Operations
- IT and FinTech

PREPARE FOR THE FUTURE

Pressure is mounting to deliver innovation for all financial services institutions. Alleviate the pressure with Appian. Streamline operations, reduce costs, facilitate collaboration, and navigate change.

- Unify relevant information and systems to get work done with Appian.

- Achieve significant efficiency in work execution while leveraging legacy IT investments.

LEADING ORGANIZATIONS TRUST APPIAN:

Bendigo and Adelaide Bank · BARCLAYS · CLAYTON. · CME Group · Commerce Bank

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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 competitive differentiation.

For more information, visit www.appian.com