

Appian for Financial Services and Insurance

PENSION SCHEME CHANGES AND ASSET TRANSITION

- Automate processes and consolidate data into one single view
- Ensure compliance throughout the transition process
- Facilitate communication between internal and external stakeholders
- Reduce operational costs

Managing the process of pension scheme changes and asset transition is complex, and time delay is a critical element that can impact a positive outcome. Usually, transitioning from the old portfolio to the new portfolio can take a few days, but it can last weeks or, in complex cases, months. During this time, there is a risk that the performance of the portfolio being transitioned can lag behind the new portfolio's returns, so automating this process is of great benefit to pension providers and customers alike.

Efficient transition management can represent a significant source of cost savings to pension providers and positively contribute to total portfolio returns.

What is the best technology strategy to connect the people, processes and data for efficient change management?

MEET THE CHALLENGE

Pension providers need a more efficient, auditable and transparent way to execute against the transition of pension assets, one that reduces the costs and risks associated with changes to investment exposures.

Leveraging Appian, pension providers can and pull together data from all sources into a comprehensive application that enables:

- Automated, timely communications with the group and individual members to ensure compliance
- A composite view of all information for fast and easy access to scheme, member details and individual member assets
- Role-relevant access to information for all constituents, reducing delays and the data-security risk of personal information exchanged through email

- The capability to initiate and track a scheme reconstruction in one place, one demand, to enable SLA and forecasting
- Fund-mapping and automatically generated models based on maps, reducing the risk of error associated with manual mapping



Pension Scheme Changes and Asset Transition

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 Servicing and Administration
- Pension Operations Structured Settlements
- IT and Service Management
- IT Security Coordination

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:



Appian

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