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Appian for Financial Services

HUMAN RESOURCES MANAGEMENT

> Improve compliance around employee data privacy, security, and safety

> Streamline requests with a self-service portal for a seamless employee experience

> Centralize and automate human resources access management to systems, buildings, etc.

> Gain visibility into license holders of industry-specific exams, e.g., FINRA, NASAA, etc.

The human resources lifecycle in financial services is a complex, multi-faceted process that spans employee records, payroll, recruiting, hiring, on-boarding, evaluating, training, assessing, allocating rights and equipment, access to systems and buildings, staffing to work assignments, and end of service. Despite these complexities, many financial institutions rely on stand-alone processes in disparate systems, communication through emails, information in Excel spreadsheets and databases — silos of disconnected data and workflows that create inefficiencies and leave room for human error, frustrating employees and putting financial institutions at risk.

Financial institutions need a centralized human resources solution that provides a unified view of each employee, a self-service portal for employee requests, and control for all aspects of HR processes.
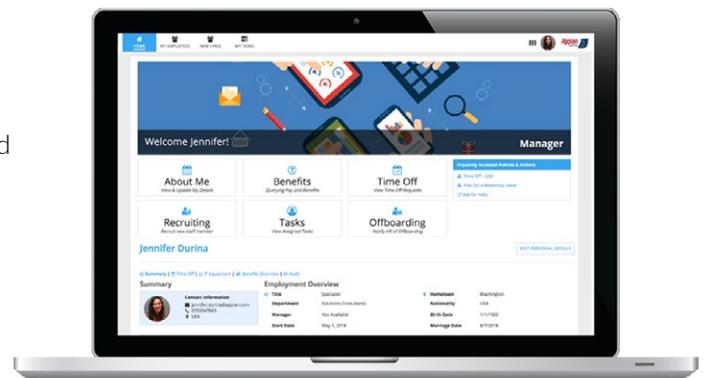
MEET THE CHALLENGE

With Appian's intelligent automation and case management capabilities, financial institutions can improve the employee experience, increase staff productivity, identify process improvement areas, and speed up on-boarding processes.

From salary increases to performance reviews and benefits, rely on Appian's enterprise platform for low-code application development to deliver a seamless experience by consolidating employee data, processes, and requests.

Improve HR management through:

- **A comprehensive employee lifecycle record** to track employment and disclosure histories, requirements for licensing, and access to data and systems, including a detailed audit trail.

- **A self-service HR request portal** to manage employee requests and a searchable knowledge library of HR documentation and articles.

- **Robotic process automation (RPA)** to automate repetitive tasks, such as managing payroll and leave requests.

- **Seamless integration with existing human capital management systems,** like Peoplesoft, Workday, and ADP, for end-to-end process transparency and a single record of truth.

- **Improved visibility, tracking, and reporting** around all HR functions to proactively identify process improvements.

FOCUS

Harness the employee lifecycle with an easy-to-use application that enables financial institutions to:

- Consolidate disparate systems, spreadsheets, and paper processes, while extending human capital management systems

- Standardize and automate repeatable processes for employees and contractors to ensure consistency and reduce human error

- Keep employee data safe, secure, and compliant with a single record of truth and detailed audit logs

- Achieve insight into the complete employee lifecycle to improve the end-to-end human resource management process

- Reduce operational costs through automation and increased efficiency

TAKE CONTROL

Quickly build, deploy, and scale corporate function initiatives with enterprise solutions, including:

- Internal Audit

- Enterprise Risk Response and Investigations

- Finance Management

- IT and Service Management

- Legal Management

- Tax Management

- Treasury Dashboard

- Financial Accounting Processes including month-end, quarterly, annual close

- Investment Strategy On-Boarding

PREPARE FOR THE FUTURE

Pressure is mounting to deliver innovation in financial services.

It takes speed and power to deliver transformational solutions. Appian's enterprise platform for low-code application development provides both, while leveraging your legacy IT investments.

With Appian, financial institutions can build web and mobile apps faster, run them on-premises or in the cloud, and manage complex processes, end-to-end, without limitations.

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Realize the benefits of Appian to transform your HR management.
Learn more at: appian.com/finserv

Appian

Appian provides a software development platform that combines intelligent automation and enterprise low-code development to rapidly deliver powerful business applications. Many of the world's largest largest financial services institutions use Appian applications to improve customer experience, achieve operational excellence, and simplify global risk and compliance.

For more information, visit www.appian.com/finserv