Connect people, process and data for faster time to revenue

For most financial services organizations, business-to-business (B2B) onboarding is complex, fraught with risk, and unacceptably slow. It often takes many months to onboard an institution as a client and the stakes are high – the longer the onboarding window, the greater the risk of delay or loss of revenue, or the loss of a high-value client relationship.

Onboarding is often hindered by a lack of process orchestration, poor visibility, and an inability to adapt to rapidly changing corporate and regulatory environments. As operating models become more distributed and more decentralized, the need for a connected, automated and personalized onboarding experience increases.

Traditional off-the-shelf software solutions and manual processes that rely on spreadsheets and email are not sufficient to address the high risk of non-compliance and loss of revenue, and they fall far short of client expectations. What is needed is a flexible solution that takes the risk out of onboarding, accelerates time to revenue, and empowers business users with complete control of the onboarding journey, while automating manual steps, increasing process transparency, and connecting your organization to the client through a secure portal.

Simplify, accelerate, and modernize onboarding

Appian has been building institutional onboarding solutions for the world’s largest financial services organizations for more than a decade. Built on the Appian low-code automation platform, enhanced with rich business logic and pre-configured industry templates, and integrated with industry-leading data sources for verification and/or sourcing of client data, Appian Connecting Onboarding is the solution of choice for creating connected, automated and personalized B2B onboarding experiences.

Connected Onboarding leverages intelligent document processing (IDP), robotic process automation (RPA) and artificial intelligence (AI) to deliver a guided onboarding experience, streamline decisioning, and remove friction from the onboarding process. It leverages systems and data in place and provides complete visibility into the onboarding process, allowing users to take relevant action and onboarding teams to understand the state of the onboarding at every step in the process.

STATE STREET GLOBAL ADVISORS

With Appian, State Street improved time to onboard by 20% YoY, realized a 30% improvement in operational efficiency, and reduced losses due to errors by 50%.
Transform institutional onboarding with Appian connected onboarding.
Learn more at: appian.com/connected-onboarding