

# Client Lifecycle Management

Single Morden Unified solution | Powerful Orchestration | Every Client Lifecycle Event | **Low Total Cost Of Ownership** 

DIGITAL CLM **APPLICATION BUILT ON** 

Enabling financial institutions bringing full client centric approch & managing eyery lifecycle management steps in controlled & efficient way!

### **KEY CHALLENGES**

Financial Institutions (FIs) have seen significant pressure to evolve and innovate their client lifecycle management (CLM) in the past few years.

03



01 Fragmented **Manual Processes** 



Changing Client Expectations



Product-Centric to "Customer- Centric"



Fintech Distruption



05 Client Data Discrepancies



06 Lack of Team Task Assignment & **Ownership** 

**COMPETITIVE FEATURES** 



## **CLIENT SPEAK**



- Georg Kolin, Head of Group Customer Experience & Digitization, Addiko Bank

Appcino's Onboarding, KYC & Client Lifecycle Management applications turned out to be the right fit for us. Given the out-of-the box functionally and the easy customizability, we were able to accelerate our implementation. The application are easy to learn & use, resulting in a better experience for our front staff as well as our customer.

"The solution allows for a roll-out across multiple division, markets and regions."

### UNIQUE VALUE **POSITION**

Rich CLM Process Orchestration with Client-Centric **Approch** 

Single Unified solution for All Client Relationships

Risk-based

Approch Driving /

Automated & Manually KYCs

Connected CLM Processes & Systems

> Paper-less documents Automation

Single Client View

Automated On Demand KYC's

Advantages for Banking & Financial Institutions.

Delivering Tangible Return on Investment (ROI) & Business

Digital Self- Service **Client Onboarding** 

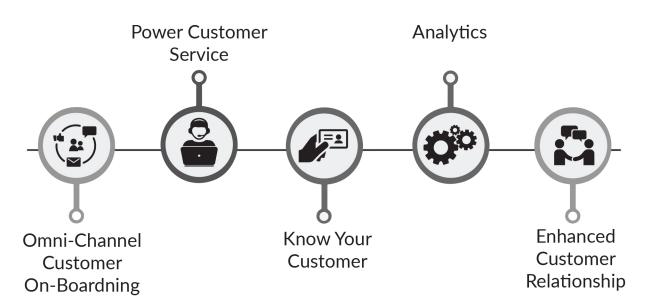
**Unified Customer** Interaction

Bank- office Processes Factories for RPA

**Empowering Business** Users

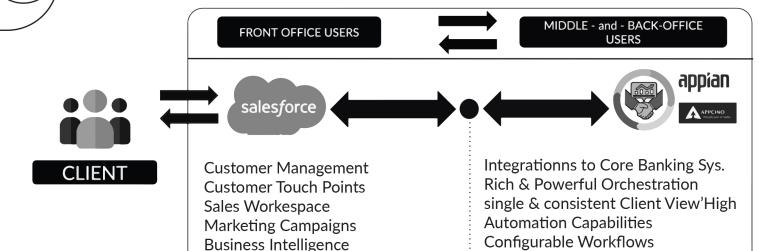
> **Next-Generation** Customer Services

# **COMPONENTS**



### SALESFORCE + APPCINO CLM

Connected Proposition- Boosting advisor productivity, Strong Client Centricity, and Ensure Regulatory Compl ance!



**Up-sell & Cross sell Opportunities** 

# **CUTTING THROUGH HIGH COMPLEXITY**