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Appian Connected Servicing

Improving customer satisfaction with more streamlined, seamless transactions.

Complex processes with high stakes.

How can financial services institutions streamline and orchestrate their activities for greater speed, accuracy, efficiency, and customer satisfaction? With Appian Connected Servicing, both customers and customer service teams gain visibility into the process, ensuring everyone knows where a request stands at any moment in time.

Account owner updates like beneficiary changes, closures, fee structure revisions, and address changes are routine—and critical—activities for financial services institutions. Often these client or custodian requests involve a variety of processes, systems, and data sources across departments and organizations. This is particularly true when dealing with capital markets, larger institutions, global transactions, and managing portfolios of ultra-high net worth individuals.
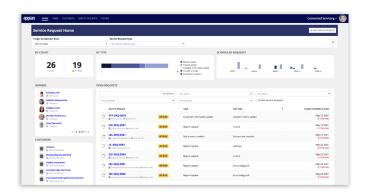
The stakes are high for not completing customer service requests in an accurate and timely fashion and service level agreements (SLAs) and key performance indicators (KPIs) are on the line. Yet audits and lookbacks can disrupt daily operations, leading to client reimbursement fees, reputational damage, and even fines. Poor communication and delays can weaken client relationships and hinder attempts to upsell and cross-sell other products and services.

Appian Connected Servicing addresses account management challenges and more, orchestrating and automating tasks throughout the request lifecycle, integrating systems and data, and providing a complete view of account history and changes.

Maximizing visibility, efficiency, and control.

To increase transparency between internal and external users, Appian Connected Servicing also leverages the external self-service portal to manage the requests and documents needed directly with clients. The benefits of the portal include:

- Minimizing the back-and-forth of email communications between parties.

- Allowing customers to provide sensitive information securely via a document management system.

- Empowering end users to submit requests directly and monitor status easily.

Internally, Appian Connected Servicing improves performance and drives results across the enterprise. For example:

- Relationship managers work more efficiently and improve customer experience by being able to streamline activities, consolidate information, and keep clients informed throughout the process.

- Client servicing and onboarding groups provide greater oversight with improved visibility across departments, instant views of request performance vs. plan, and an increased ability to collaborate for swifter issue resolutions.

- Executive leadership gains increased confidence of requests being fulfilled and SLAs met without delays or issues.

Behind the scenes, IT teams benefit from the solution's adaptability, extensibility, and speed to market. Predefined components keep servicing operations on the fast track with the ability to configure features to an institution's unique and complex environment.

Through expedited processes and increased visibility, Appian Connected Servicing customers have reported up to 64% increase in customer satisfaction, with improved SLAs and KPIs.

Streamlined and connected request processing.

Appian Connected Servicing gives front-end business users, including customers, the ability to create and view service requests, and helps provide financial services institutions with a single place to orchestrate all of their account needs.

Configurations enable business users to manage service request types, map document types to service requests, and select service requests from default fields.

Dashboards provide visibility into service request completion, by customer and percent completed on time, and task completion by group.

Integrations with other financial services industry applications give teams the ability to enhance customer profiles and account record data.

Task orchestration is a crucial part of executing customer requests. Appian Connected Servicing unites these tasks for greater efficiency and accuracy for relationship teams and a faster, better experience for the customer.

Appian Connected Servicing empowers relationship managers, client servicing and onboarding teams, and leadership with the ability to:

- See and orchestrate current and upcoming servicing requests.
- View a complete history of all upcoming, active, and past service requests for a customer.
- Configure and control the tasks generated for, and assigned to, specific service requests.
- View SLA reports to improve processes and ensure quick turnarounds.
- Initiate service requests from external "red flag" triggers and manage regularly scheduled service requests.
- Empower customers to submit requests directly.

Part of a comprehensive financial services solution.

Appian Connected Servicing is the latest solution in a bigger picture and broader goal: to give financial services institutions a single place to orchestrate all of their account needs. Appian Connected Onboarding is the solution of choice for creating connected, automated and personalized B2B onboarding experiences:

- Built on the Appian Low-Code Automation Platform.
- Leverages intelligent document processing (IDP), robotic process automation (RPA) and artificial intelligence (AI).
- Uses pre-built data integrations to deliver seamless access to information from other sources.
- Swiftly configures and launches for increased productivity.
- Escalates task management through approving and reassigning tasks routed for manager approval.
- Provides a complete customer profile of all current business activities.

Leading financial services organizations trust Appian:

S&P Global   Bendigo Bank   OCC   HARBOURVEST   Santander