



## Appian for Financial Services: Deal Initiation and Review

As financial institutions evaluate opportunities, from investments and acquisitions to extending services to new customers, they must be able to move quickly while protecting sensitive deal information. A deal response requires coordination, comment, and buy-in across many corporate functions: management, risk, operations, finance, legal, HR, and more. Meanwhile, senior leaders in capital markets and private equity firms need a centralized, end-to-end view of this process, with consistent access to information and the ability to collaborate.

By automating manual processes and connecting disparate data sources and legacy systems via an integrated platform, financial institutions can gain clear visibility of, and quickly act upon, complex deals, across channels, regions, and products.

### Meet the challenge.

The Appian low-code automation platform gives financial institutions the ability to manage the deal process end to end, from initiation through review, configuration, and approval.

- **Faster decisions and top-line performance.** Quickly deploy applications and adapt to changes instantly with Appian's low-code development.
- **A comprehensive, integrated view.** Gain a full audit history of risk processes across multiple businesses and regions.
- **Centralized data and processes across core assets.** Manage deals, funds, and investor information via an intuitive interface.
- **Improved productivity and efficiency.** Quickly and easily build and change rules to collaborate and coordinate processes across functions, lines of business, and regions.

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Coordinate tasks across multiple internal and external stakeholder groups.

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Secure deal-specific information, with complete audit trails.

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Gain visibility of critical data, processes, deals, and decisions.

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Track and manage investment activities with an integrated dashboard.

## Focus.

Transform business processes and build your digital future for deal initiation and review.

- Tightly coordinate timelines and deliverables.
- Manage deals and scenarios, from basic to complex, within the same process.
- Secure and control access for deal specifics.
- View the process end-to-end across events, departments, products, and regions.

## Take control.

Quickly build, deploy, and scale new business and deal lifecycle initiatives across the enterprise.

- Campaign management.
- Financial product management.
- Legal entity management.

## Prepare for the future.

Get innovation right the first time, prove value quickly, and build on your success.

The Appian Low-Code Platform accelerates application development while leveraging legacy IT investments.

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

## Leading organizations trust Appian.

ALLAN GRAY



CME Group



Santander



STATE STREET

Realize the benefits of Appian to transform deal initiation and review.  
Learn more at: [appian.com/finserv](https://appian.com/finserv).

# appian

Appian is the unified platform for change. We accelerate customers' businesses by discovering, designing, and automating their most important processes. The Appian Low-Code Platform combines the key capabilities needed to get work done faster, Process Mining + Workflow + Automation, in a unified low-code platform. Appian is open, enterprise-grade, and trusted by industry leaders. For more information, visit [appian.com/finserv](https://appian.com/finserv).