



Kick-Start IDP for Financial Services

Expert guidance for your intelligent document processing (IDP) project.

Whether you're trying to streamline your capital calls processes or simply gain time and cost savings, you can benefit from the Appian Automation Kick-Start for IDP.

What does the Kick-Start for IDP program include?

- Use case assessment: Is your use case a good fit for IDP?
- ROI evaluation: How much value are you likely to generate using IDP?
- Implementation recommendations: If appropriate, we'll give you access to Appian experts who can help you implement and manage IDP.

Why choose Kick-Start for IDP?

- Get an expert evaluation of your project.
- Share assessment results to get executive level buy-in.
- Start with a known and reachable goal.
- Learn to automate with confidence.
- Receive expert support to ensure a successful launch.



We saw immediate value after implementing Appian's IDP solution. By extracting data from thousands of legacy documents and linking it to records within Appian, users now have access to critical data in seconds rather than hours or days.

Matthew Richard,
CIO, LIUNA

Which processes are a good fit for IDP?

Many leading financial services organizations are already gaining savings and ROI by using IDP to automate document classification, data extraction, processing related to:

- Mortgage applications
- Account life cycles
- Credit management
- Loan agreements
- Tax notices and collection
- Changes of address
- And more

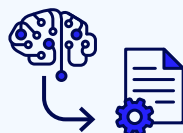
Which documents are a good fit for IDP?

Documents that are a good fit for IDP meet these criteria:

- High volume and repeatable.
- Structured or semi-structured (e.g., invoices and purchase orders).
- PDFs or can easily be converted to PDFs.
- Under 15 pages and 7 MB.



PDF Documents



AI-Driven IDP



Structured Data

Appian Intelligent Document Processing.

Appian IDP uses AI to accurately extract data from documents and automate document-centric processes end to end.

Appian customers receive 20k pages of free IDP processing each month.

Why Appian IDP?

Rapid setup. Leverage pre-trained AI models for instant extraction, easy classification, and rapid solution deployment.

Industry-leading accuracy. Automate more processes than ever with industry-leading, AI-driven document extraction accuracy.

Powerful automation. Integrate IDP into existing workflows to automate your organization.

Powered by Appian AI.

IDP is powered by Appian AI, which incorporates Appian native AI capabilities and Google Cloud's best-in-class AI services out of the box. With Appian AI, you don't need to code or be a data scientist to quickly create intelligent, AI-powered enterprise applications.

About 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.

Financial services companies trust Appian:

Vontobel

ALLAN GRAY



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STATE STREET

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