Persistent **Appian**

Enterprise Grade Digital Transformation Solutions for a Global Asset Management Firm

How Persistent helped a large asset management company to modernize their platform using Appian & RPA, saving $1M in less than 12 months

Background

Our Client offers consumer and commercial lending and banking products and services. The client offers personal checking and savings accounts, college savings plans, health savings accounts, individual retirement accounts, business checking and business savings accounts, time accounts, business online services, and merchant services. The client also provides mortgages, home equity loans, business loans, credit cards, construction loans, commercial and retirement-based real estate loans, and other loans. In addition, they provides mobile banking, personal and business online banking, and Internet cash management services.

Problem statement:

- Client needed to have a solution for Identity Theft Incident Management in place

- The solution required to have a workflow driven approach where incidents could be added by a certain group and post creation, it would be verified and approved by an Approver group

- Reports and Dashboards were required to enable the end user to check Incidents details based on date range, category and severity with additional feature to download report in excel

The client engaged with Persistent to come up with an Appian driven solution by leveraging Appian platform services. Persistent was selected because of deep domain knowledge and expertise in the Appian practice.

Persistent Solution

Persistent initialized this engagement by starting off with a Discovery Phase to capture and detail out the requirements by doing a thorough analysis of the required workflow and process flows. The technical solution is as follows:

- Using Appian 16.3 and Oracle DB, an solution was built to cater to different user-groups and workflow requirement involving creation and approval of incidents

- Appian reports were built to enable end users to review incidents with a facility to download them in excel format

- Users will have access to dashboards to view summary of incidents as per certain business criteria

The Result

As a result of this engagement, the client was able to significantly reduce the turnaround time of their workflow solution and provide a smooth and seamless incident management.

The client got the following helpful business results:

- Scalable design reducing additional costs
- Improved processes for incident tracking and approval management
- Increased speed with rapid implementation

About Persistent

Persistent Systems (BSE & NSE: PERSISTENT) builds software that drives our customers' business; enterprises and software product companies with software at the core of their digital transformation.
www.persistent.com

India
Persistent Systems Limited
Bhageerath, 402,
Senapati Bapat Road
Pune 411016.
Tel: +91 (20) 6703 0000
Fax: +91 (20) 6703 0009

USA
Persistent Systems, Inc.
2055 Laurelwood Road, Suite 210
Santa Clara, CA 95054
Tel: +1 (408) 216 7010
Fax: +1 (408) 451 9177
Email: info@persistent.com

Persistent