

ABBYY

Elevate the Customer Experience within Financial Services Using Process Intelligence and IDP

It's time to stop guessing

Today's customers expect a frictionless experience from their financial services provider – and all too often, they're let down by poorly designed processes, cumbersome onboarding, and unsatisfactory service.

The cause? A lack of visibility into how business processes are actually performing.

Stop treating customer experience as just a “nice-to-have” – get ready to start your process intelligence journey towards operational excellence.

Process intelligence leverages crucial business data to uncover insights that drive operational efficiencies. **There are five pillars of process intelligence >**



Five pillars of process intelligence

1. **Process discovery** through process and task mining to reconstruct processes.
2. **Process analysis** tools to visualize and analyze process data.
3. **Process monitoring** to define and detect patterns.
4. **Process prediction** to forecast outcomes using AI.
5. **Process simulation** to model the impact of changes.

Together, these pillars provide the comprehensive and actionable visibility organizations need to drive digital transformation, identify improvement areas, monitor automation, and continuously optimize performance.

But process intelligence is just one part of the solution.

Add intelligent document processing

Intelligent document processing (IDP) works in tandem to create even more effective and friendlier document-centric processes for your customers.

IDP identifies, extracts, processes and understands documents of any type, format, structure or complexity – paper or digital.

Learn how IDP and process intelligence can improve your customer journey >



Want tips for leveraging ID in financial services?
Get started here >

Key benefits of combining process intelligence and IDP for financial services

- **Enhance customer experience** with personalized recommendations and streamlined onboarding.
- **Streamline estate settlement** with expedited fund disbursement, streamlined document review, and improved beneficiary experiences.
- **Boost asset retention** by delivering incentives and streamlining account servicing.
- **Ensure compliance with KYC/AML and regulations** with established audit trails, optimized control testing and accelerated documentation analysis.
- **Reduce operational complexity** with consolidated systems and simplified processes.