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Modern operations for financial services

Connect front, middle, and back office on one platform to improve customer and employee experiences

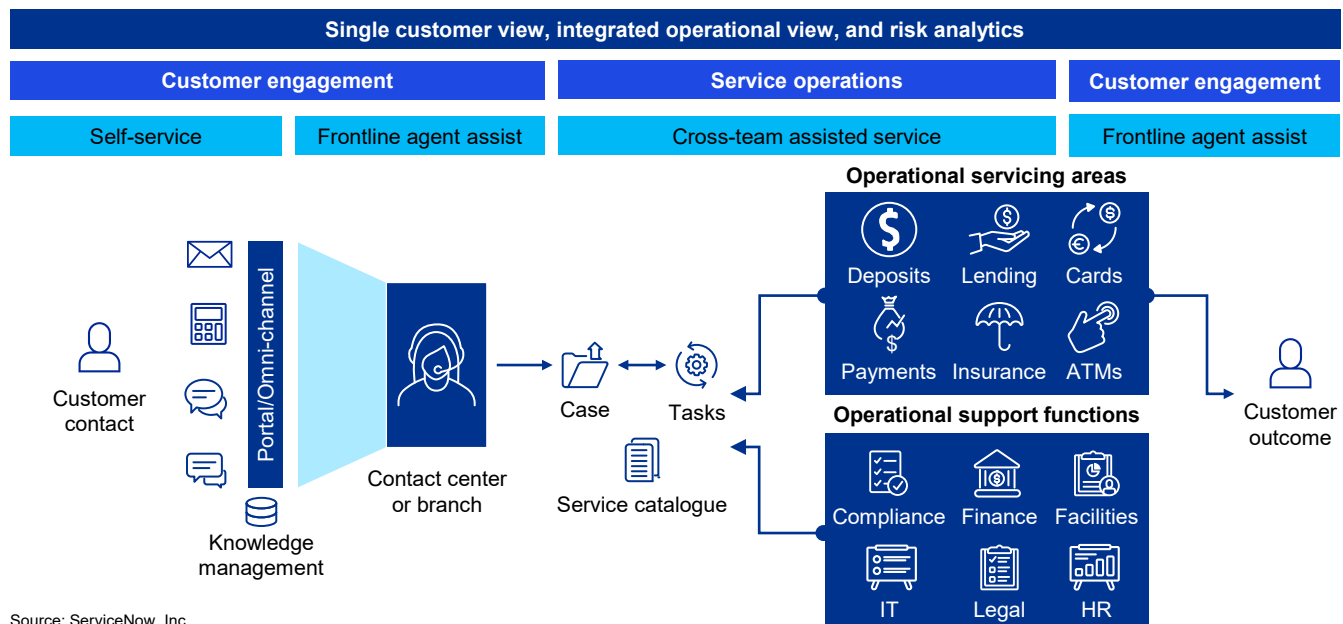
Empower employees across your institution, remove barriers, and maximize each employee's impact to improve the client experience with one front-to-back platform, enabled by KPMG and ServiceNow.

Whether banking, wealth management, or insurance, your clients trust you with their hard-earned money, future success, and ability to bounce back from an unexpected setback. When they come to you for help – suspecting fraud, needing funding, getting resolution on a dispute – they want expert advice and resolution. Even simple tasks, such as resetting an online banking password, finding the right form, or checking claim status, shouldn't be cumbersome for your client or agent. However, maintaining an exceptional level of service is no easy task. As clients conduct more financial transactions online, they expect experiences to be responsive and seamless; and when there's a hiccup then they demand quick and easy fixes.

As financial products and services become more technically advanced, so should your customer service solution. Serving customers and clients more efficiently and effectively – providing them with a positive experience – requires you to break down silos and optimize processes across departments. Automating workflows that connecting front-, middle-, and back-office processes can help you quickly resolve common issues such as complaints and transaction disputes. For example, machine learning can assist in routing cases to the most qualified agents automatically, so clients aren't given the runaround or left waiting for a response.

A single, intuitive workspace allows your organization to work as one team

Providing visibility into case history and cross-channel, interdepartmental communication so you can solve problems faster. With a modern customer service platform designed for your industry, such as ServiceNow Financial Service Operations (FSO), you can help facilitate quicker responses and automate service across your institution by connecting departments, workflows, and systems.



Source: ServiceNow, Inc.

Behind a great experience is a great workflow.

- Bill McDermott, CEO, ServiceNow Inc.

Whether it's banking, wealth management, or insurance the following examples provide insight into the areas that financial organizations are able to drive digital transformation through improved employee efficiency and enhanced customer experience, all while improving compliance and data visibility.

Insurance	Wealth management	Asset management	Retail banking	Commercial banking	Payments	Capital markets
<ul style="list-style-type: none"> Agent Support Policyholder Support Call Center Claims Mgmt. FNOL Underwriting Servicing Medical Exam Management Complaint Mgmt. Group Benefits Client Service Broker Support Vendor Mgmt. CCPA 	<ul style="list-style-type: none"> Guided Client discovery Client Pre-Onboarding & Qualify: KYC/AML/CIP/OFAC/Suitability Client Onboarding/Account Opening Broker Operations Asset Reporting Client Servicing & Transacting Complaint Management Broker Services Mutual Fund & Private Client Services Advisor Support (Inquiries & Service) Account Transfers/Transfer of Assets Case Management 	<ul style="list-style-type: none"> Investment Management Defined Contribution Plan Record keeping Investment Products Institutional Client Onboarding Asset Reporting Client Servicing & Transacting Institutional Customer Services Complaint Management Market & Securities Services Trade Order Requests, Execution, Clearing, Confirmations, Settlement, Fails, Disputes, Reconciliations Plan Sponsor and Participant Onboarding RFP/RFI management 	<ul style="list-style-type: none"> Retail Banking Customer Services Onboarding - KYC/AML Credit Card Services Disputes Back & Middle Office Operations Collections Payment & Txn, Investigations Mortgage Lending Support <ul style="list-style-type: none"> Pre-Foreclosure Review Complaint Mgmt (CFPB) Military Benefits (SCRA) Financial Crimes (AML) White Label Credit Card Services HELOC Services Auto Loans CCPA 	<ul style="list-style-type: none"> Commercial Banking Services Commercial lending <ul style="list-style-type: none"> Underwriting, Due Diligence Loan Operations-PPP Custody Credit Risk Banking Services Commercial Card Services Treasury Services White Label Credit Card Services Fund Administration 	<ul style="list-style-type: none"> Mobile Payments International Remittances POS Devices Payment Operations Fraud/Investigations Card Operations 	<ul style="list-style-type: none"> Structured Finance Investment Banking Underwriting Debt & Equity Financial Exchange Future Clearing & Collateral Prime Services Prime Financing Institutional Client Services Treasury & Trade Solutions Custody Fund Administration Performance Measurement Investment Services

Source: ServiceNow, Inc.

Why KPMG and ServiceNow?

KPMG is a leading provider of cloud-enabled transformation solutions and a ServiceNow Global Elite Partner. Our financial services advisory team and experienced ServiceNow alliance and practice team collaborate to address market challenges, provide in-depth industry perspectives, and implement leading technology. In addition, our integrated services include financial transformation consulting, FS technology, change management, and employee experience consulting. KPMG was named ServiceNow's 2022 Global Transformation partner of the year, and we are proud to work alongside ServiceNow to create capabilities critical to the financial services industry. We put our industry knowledge, process, and technical experience to work to provide the appropriate solution for your institution.

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