

Financial Services



Drive Productivity, Reduce Costs, and Achieve Compliance

Financial Services organizations face a highly regulated and competitive market landscape, with customers demanding hyper-personalization and better service. iGrafx Process360 Live is a comprehensive process intelligence platform that provides deep insights into how processes perform across departments, helping financial institutions optimize key areas, streamline operations, and improve customer experiences, all while ensuring regulatory requirements are met.

Optimization Potential

Boost Productivity. iGrafx enables financial services organizations to streamline complex processes, boosting employee productivity and process efficiency. By identifying bottlenecks and inefficiencies, the platform ensures financial institutions can speed up operations, allowing faster turnaround times and better service delivery across key functions like customer onboarding, loan approvals, and KYC compliance.

Reduce Operational Costs. By providing a granular view of process performance, iGrafx helps financial institutions identify areas where cost-saving measures can be implemented. Whether it's through process re-engineering or optimizing resource allocation, the platform uncovers opportunities to reduce operational expenses while maintaining quality service, ultimately enhancing profitability and scalability.

Ensure Regulatory Compliance. For financial institutions operating under strict regulations such as the Dodd-Frank Act and Basel III, iGrafx helps ensure compliance by tracking key processes against these requirements. The platform facilitates real-time monitoring, reporting, and auditing, enabling institutions to avoid fines and penalties while maintaining transparency and control over regulatory processes.

Improving Critical Processes in Financial Services

Process360 Live empowers financial institutions to optimize and enhance a wide range of core and ancillary processes. Here are examples of key financial services processes that can be significantly improved:

Know Your Customer (KYC)

iGrafx helps streamline the KYC process by providing insights into inefficiencies, reducing the time and resources required for accurate customer identification. This improves the overall compliance rate while minimizing manual errors, ensuring faster and more reliable customer verification without sacrificing regulatory adherence.

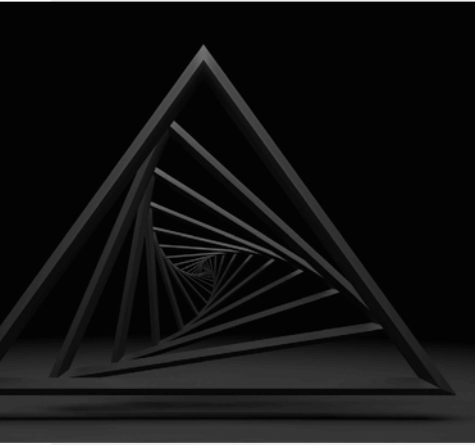
Customer Onboarding

iGrafx optimizes customer onboarding by analyzing and refining each step of the process. Financial institutions can reduce onboarding time, eliminate redundancies, and enhance the customer experience, allowing for faster account activations and an improved customer journey that drives satisfaction and retention.

Loan Processing

iGrafx enables financial institutions to optimize the loan processing lifecycle, from application submission to final approval. By identifying delays and improving resource allocation, institutions can reduce the time taken to process loans, enhancing customer satisfaction and minimizing the risk of missed opportunities or manual errors in review stages.

How it Works



Process Mining

Uncover Hidden Inefficiencies

Process mining with iGrafX provides organizations with complete visibility into how processes are executed, leveraging data to pinpoint inefficiencies and uncover hidden bottlenecks. This enables real-time insights into business performance.

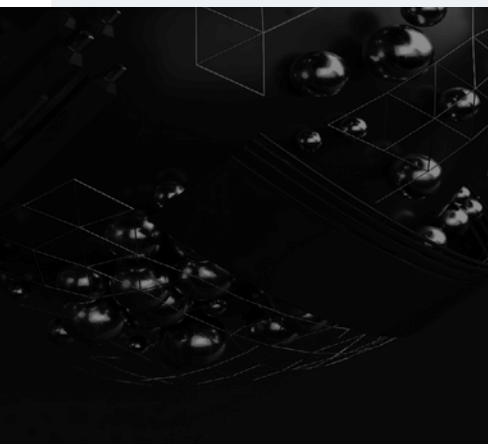
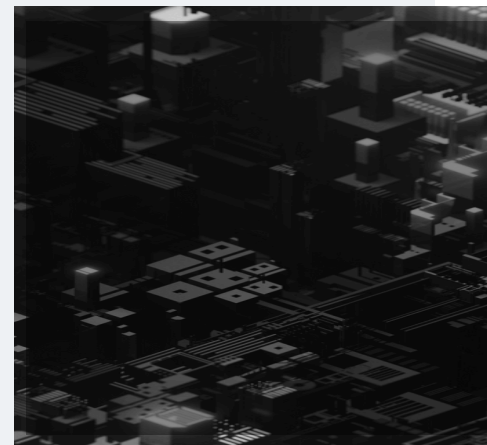
- Identify inefficiencies in real-time, improving responsiveness
- Track actual performance vs. intended process design to ensure alignment with business goals
- Detect bottlenecks and prioritize areas where advanced technology like automation and GenAI could drive greater value

Process Design

Design Future-Proof Processes

iGrafX offers a powerful, intuitive environment for designing processes that align with both regulatory standards and business objectives. Teams can model and optimize future-state processes based on insights from current operations.

- Visualize processes across departments to identify points of friction and improvement opportunities
- Model potential changes and analyze their impacts on cost, productivity, and compliance
- Collaborate across teams to ensure process designs meet the needs of the entire organization



Process Simulation

Test & Optimize Before Implementation

With iGrafX's process simulation capabilities, financial institutions can test changes and predict outcomes before full-scale implementation. This reduces the risk of disruptions while enhancing decision-making.

- Simulate different scenarios to assess the impact of process changes on overall performance
- Evaluate potential automation and GenAI deployments in a risk-free environment
- Ensure processes are resilient to fluctuations in demand or regulatory updates