ServiceNow® Financial Services Operations

Transform business operations to enhance customer experiences
Financial Services Operations (FSO) is a cloud-based digital workflow platform that offers a faster and more economical approach to transformation by connecting business processes in your financial institution, front to back, on a single system. FSO impacts the experience of not just customers, but also employees. The whole business is brought together, driving increased efficiency, improving resilience and profitability. With purpose-built applications for key operational lines of business, data model aligned to industry standards to enable financial institutions to quickly and easily add new capabilities, speed to market for financial institutions, connecting siloed teams and shared services across a financial institutions. This will help with the better management of data, workflow automation, and digital channels as a means for simplifying processes, acting proactively, and becoming more predictive.

Maximize productivity and improve resilience
Financial services organizations today need to fuel business agility and resilience to drive growth, to strengthen business continuity, and enhance employee productivity. By following standard processes inside workflows, the ability to demonstrate compliance to regulation is simplified. Financial Services Operations along with Integrated Risk Management capabilities gives banks the ability to embed and manage real-time compliance.

We are the Platform of Platforms
ServiceNow Financial Services Operations solves the challenge of fragmented business environments by connecting legacy systems and processes across front, middle and back offices. With this single view across the enterprise, institutions can correlate disruptions, assess impacted services, proactively alert on affected services and identify where problems occur.

A systematic redesign of customer banking journeys can result in at least a 15-20% lift in customer satisfaction

Process automation and AI can reduce costs in the front, middle, and back office by as much as 30-40%

Highly satisfied customers are two-and-a-half times more likely to open new accounts/products with their existing bank

Source: *Rewriting the rules: Succeeding in the new retail banking landscape*, McKinsey, February 2019
Financial Services Data Model - leverage a tailored out-of-the-box data model that provides standardized configuration.

Financial Services Card Operations - provides pre-built workflows to create and manage typical cases and tasks for credit card requests.

Financial Services Payment Operations - provide workflows that can help the customers of banks create payment inquiries and check the status of their inquiries.

Proactive Customer Service Operations - monitor your customers’ products and services to identify issues and proactively fix them.

Predictive Intelligence – use machine learning to route issues, recommend solutions, and identify knowledge gaps.

Virtual Agent - improve the customer self-service experience with conversational guidance using a chatbot.

Performance Analytics – analyze trends with KPIs, metrics, and role-based dashboards for customer service.

Playbooks for Customer Service – manage case flows across teams by digitizing and automating service processes

Guided Decisions – dynamically guide agents to resolve complex cases with contextual recommendations.

Customer Central – give agents a consolidated view of internal and external customer financial data to boost productivity

Customer Project Management – manage your entire project lifecycle and empower customers and agents to manage project tasks.

Continual Improvement Management – initiate and track improvements across the enterprise by aligning people, processes, and data.

Agent Workspace – enhance agent productivity with multitasking, integrated solutions and an optimized layout.

Case Management – manage customer interactions and visually track activities, case status, and SLAs.

Omni-Channel – integrate telephony systems and support customers across online banking, mobile banking, and social media.


Self-Service – drive self-service from a portal integrated with knowledge, service catalogs, communities, and chatbots.

Knowledge Management – provide instant access to relevant knowledge for customers and the agents who serve them.

Communities – connect customers and employees with their peers to find answers and solve problems.

Mobile App – manage cases on the go with a consumer-style app using native device features.

Service Management for Issue Resolution – identify, diagnose, and permanently resolve customer issues.

Advanced Work Assignment – Automatically route work to the best agent based on criteria or an affinity to the case.

Visual Task Assignment – assign customer requests and tasks to other departments with visual task boards.

Surveys – use surveys to measure voice of the customer and stay current with customer concerns.

Reports & Dashboards – generate and distribute customers reports and dashboards on demand.