



Wealth & Asset Management

Wealth and asset management customers expect seamless customer service and fierce protection of their data. But siloed departments and point solutions make it nearly impossible for financial institutions to deliver integrated, automated, anytime-anywhere service for clients and employees. Meanwhile, people-intensive processes drive operating costs ever higher. What you need are self-service tools that empower clients to take a more active role in their financial journey and end-to-end business processes that originate in the front office then automatically engage all necessary stakeholders. Integrated workflows on the back end should orchestrate the right actions to the right people across the front, middle, and back offices and deliver the data needed to get the right actions done. Leveraging a single platform to do this also provides the ability to proactively monitor and address cases that pose a risk of customer abrasion—or any other risk.

Enter ServiceNow - The Platform of Platforms

Differentiated Client Service

Automate middle- and back-office processes, including complaint management, billing/account issue resolution, fund/plan administration, portfolio visibility, common issue resolution, and performance reporting. With ServiceNow, financial institutions can create a digital customer service experience with end-to-end visibility that empowers wealth managers to make the right decisions and act faster for clients, driving increased client loyalty. Self-service functionality allows clients to address many common problems and account changes by themselves.

Connected Brokerage

Creates a single portal that wealth and asset managers can use to report any kind of issue for a quick response. ServiceNow automates back-office requests and process workflows to free up managers from redundant administrative tasks and create real-time visibility into client accounts that can be shared between managers. It also provides visibility into the management of services provided to captive and independent agents to enable proactive field service.

Employee Lifecycle and Compliance Management

Eliminate paper-based, manual processes and create a single, digital system of employee engagement for requests, events, and compliance. ServiceNow supports every employee through their lifecycle while providing management a real-time aggregated view of compliance and alerts through continuous monitoring that leverages CMDB data and reporting modules.

Operational Resilience

Integrate governance, risk, and compliance across technology, cyber-security, people, property, and supplies to ensure critical business services remain operational. ServiceNow automates the response to cyber threats and risks based on business impact. From GDPR to PSD2 to CMA—ServiceNow lets you keep up with regulations and reduce the costs and complexity of manual edits.

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