

AWM

Activity Workflow Manager



Manage your daily tasks, alarms, processes and applications from a unique access point

FNZ is the **global platform provider** in the wealth management sector, partnering with over 650 of the world's leading financial institutions and over 8,000 wealth management firms.

With over 4,500 employees in 21 countries, FNZ's mission is to open-up wealth, empowering all people to create wealth through personal investment, aligned with things they care about the most, on their own terms.

At FNZ, we leverage our extensive experience in wealth management, **reinventing ourselves to innovate and adapt** to an industry in evolution and facing structural challenges:

-  Heavy and paperbased workflows increasing manual tasks and operational risk,
-  Increased constraints on regulatory compliance,
-  Constant margin erosion and increased competition deteriorating levels of commissions and fees,
-  Client expectations for enhanced UX digital solutions requiring efficient integration capabilities to web and mobile applications.

Our **award winning solutions** are made for private bankers and wealth managers to enable them to **turn these challenges into opportunities**.

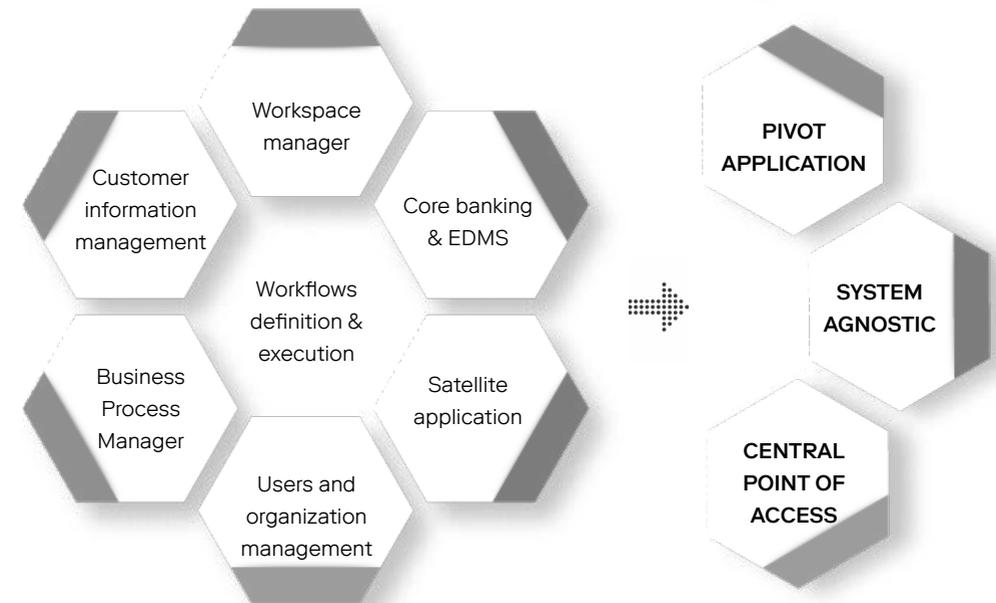


Seamlessly manage your tasks, alarms, processes and applications from a unique access point



FNZ **Activity Workflow Manager (AWM)** allows private bankers and wealth managers to seamlessly manage their tasks, alarms, processes and applications.

It is an interface that will grant the access to dedicated work environment **-workplaces-** from a unique access point.



FNZ solution

FNZ' AWM can provide a **full workflow chain** that can be triggered from:

- Events generated from a back-office system (payment, restriction breach, etc.),
- Documents from the EDMS (Electronic Document Management System),
- Manually from the user.

It replicates the full organization of the bank and can be a **centralized access point** to launch applications and work with the tasks and alerts assigned to a team or a specific user.

With AWM, you can manage, treat, and navigate through all links & documents related to a task from a single and centralized application.

The Activity Workflow Manager

AWM is a complete **Business Process Management (BPM)** system that will help you increase your operational efficiency. Flexible and customizable, the solution automates your internal workflows to assist you in your daily tasks. This agnostic system can be configured internally to enhance workflows, alerts and access management.

Workflow chain

The solution allows companies to fully replicate their internal organisations and associate their teams and/or departments to dedicated workspaces combining two elements:

- The dedicated systems that users operate in their day-to day work (ex. relationship managers will operate CRM and reporting softwares);
- The related tasks and alerts.

Each system, task and alert can be defined for each workplace -and its related users- and

automatically programmed through the AWM solution. It allows a complete flexibility and a full automation of processes (cf Central Management organization below).

Centralized access point & integration

The FNZ' AWM solution is an agnostic system that can be connected to any third party application. It is natively integrated with the FNZ solutions (APSYS, Banker's Front, Logical Access) and can provide out of the box workflows, such as restriction breach management, corporate actions, reporting, etc.

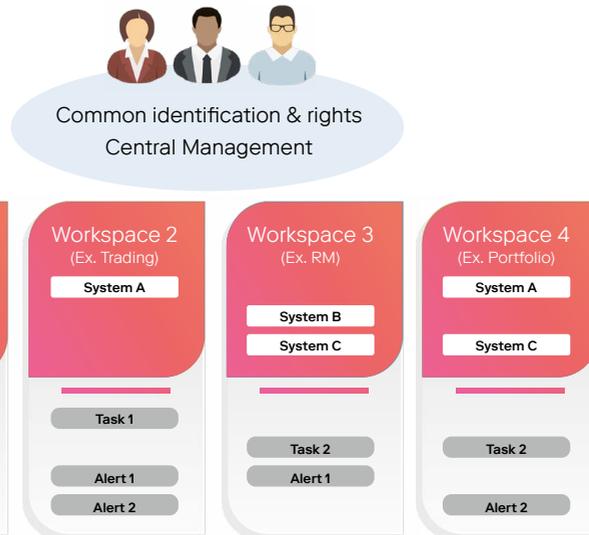
It is a centralized access point from which the users will:

- Access all the applications used for their day-to-day work,
- Receive alerts and notifications from systems or from another user,
- Manage workflows and tasks.

Organization Replication & User Access Management

Centralized System Access

Tasks & Alerts

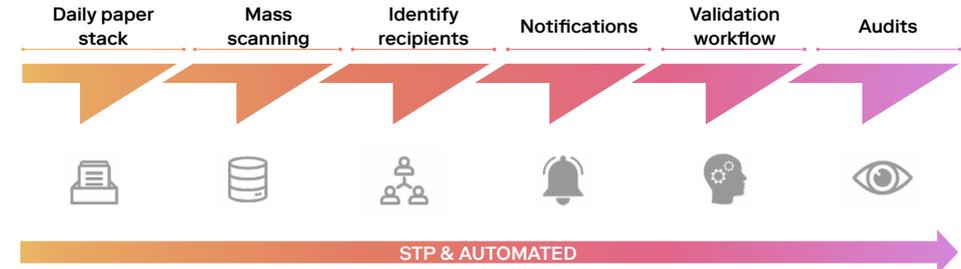


Use case – Paperless banking



There are various uses cases that can easily be implemented in a bank or a wealth management company.

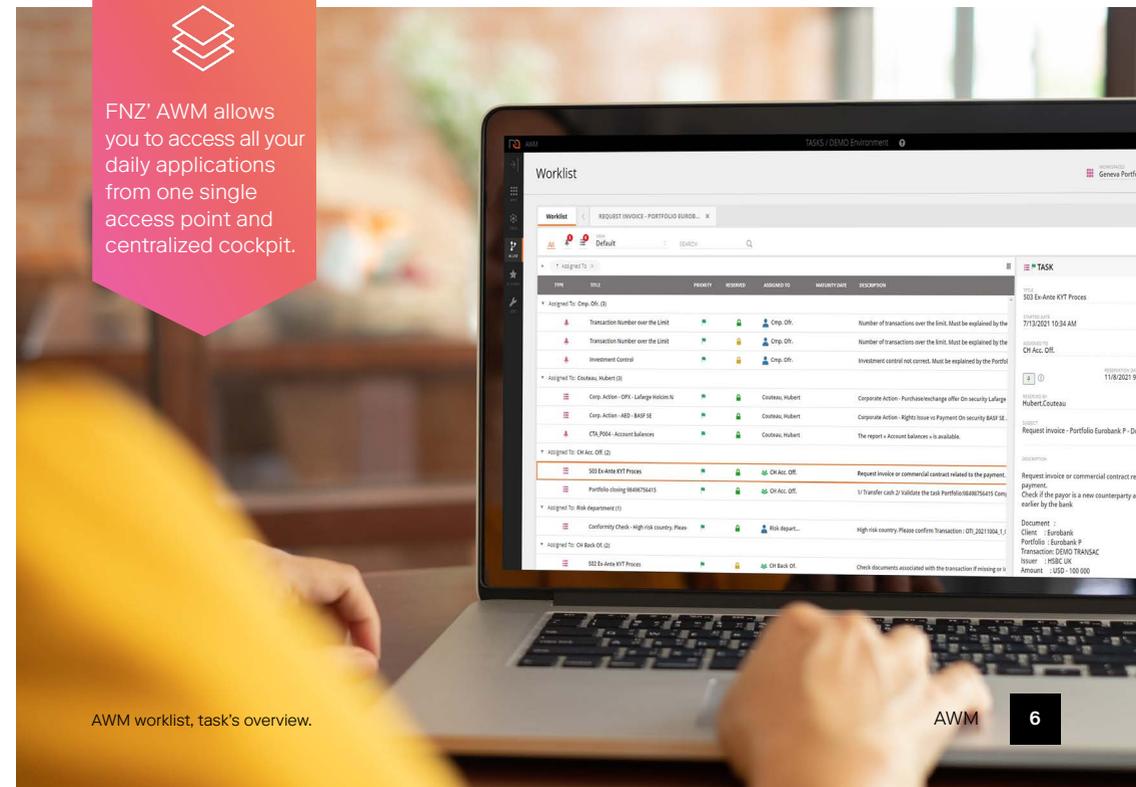
In this case, a full paperless workflow will allow the bank to avoid papers travelling inside the company and remove them when applicable:

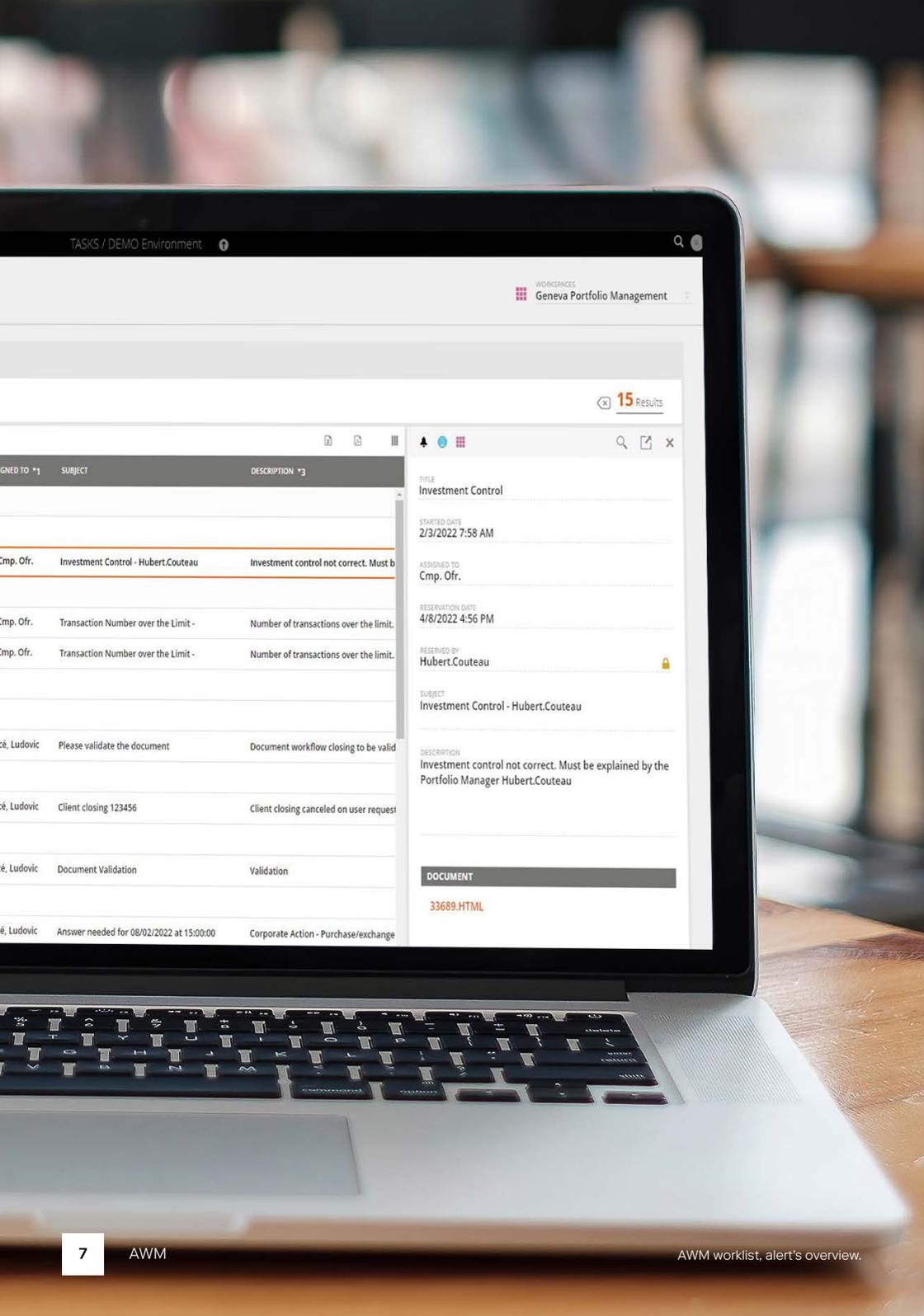


FNZ' AWM also allows you to efficiently manage e-banking restriction breach alerts, unlock the client directly from the cockpit and manage

Corporate Action alerts and decisions from the application.

FNZ' AWM allows you to access all your daily applications from one single access point and centralized cockpit.





AWM key features



Workspace management

- Company structure replication
- User rights through LDAP
- Access to all users relevant systems through one cockpit
- Access to team/user specific tasks and alert



Tasks & workflows

- Workflow management: requires user action
- Automatic system Trigger (Corporate Action to select, restriction breach to unlock...)
- Manual user trigger: document validation request, 4 eyes, account closing...
- Centralised view in one cockpit of to do list's on different tools



Alerts

- Alerts and notifications: information purpose
- Event related: transaction coming, process over...
- User initiated: warns another user/team
- Reporting from external system centralized in the digital cockpit



Customization

- UI customization (user/team defined and specific)
- Drag and drop
- Workflows and tasks modification and creation



Connectivity

- Natively integrated with FNZ products (APSYS, Bankers Front, LAS)
- Connection to any internal or third – party system





Request a demonstration, ask a question
or book a call, we are available for you:

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