

Decisions is the Right Software for the Complexity and Customer Centric Approach of the Financial Services Industry

Accurate, current, real-time data is an absolute necessity for the financial services industry. Workflow automation offers a way to reduce human error in data entry while freeing up resources otherwise spent on time-consuming manual processes. Financial services organizations can use workflow automation software to:

- Create unique business rules and workflow capabilities
- Leverage data-driven processes with human analytical capabilities, thus leading to better decisions and forecast based on credit risk models
- Streamline the onboarding process for new customers, thus ensuring that everyone receives the proper documentation and information

AUTOMATE CREDIT REQUESTS AND APPROVAL PROCESSES

Via rule-based workflows, business process management technology automates the credit approval process based on the validated answers provided by the applicant. Plus, you're able to customize loan approval logic and rules to your needs. As an example of what Decisions can help you achieve, consider a policy calculator—using data and logic to combine risk with terms, payment schedules, and other information— that lets potential borrowers know what their rates may be upon approval. This allows you to collect the information needed to create a custom policy to fit any customer's needs.

AUTOMATE CUSTOMER ONBOARDING

Financial services organizations live by "KYC": Know your customer. Besides providing the best service possible, KYC also protects your business from unintentionally violating various countries' money laundering rules. Rules based on a customer's country help collect, verify, and validate the customer information as legally required. This knowledge allows you to report necessary transactions and keep you in compliance.

"One of the easiest buy-versus-build decisions I can remember making. I've been impressed with the quality and clear depth of design in the product since the demo. It is easy to see this is built for real devs—but in a way that's accessible to everyone. Tell your owners, dev manager, whoever runs product design—this is an impressive system."

**- Kurt Dicus
(CTO – Shield Compliance)**



CREATE RULES THAT SCALE WITH YOUR BUSINESS

A rules engine that relies on hard-coded rules doesn't allow enough flexibility for a rapidly growing business to scale and orchestrate data. Such rules also require long development cycles to test and debug. Decisions delivers a powerful, versatile rules engine with workflow capabilities to provide a seamless rule-editing experience and dashboards to audit and analyze the results.

MANAGE COMPLIANCE

Because it is so highly regulated, the financial services industry has to document requests and discovery from government regulators around the globe. Moreover, you're required to provide customers with frequent reports on investments, policies, loans, and so on. Business process management software ensures that documents are properly recorded and maintained so that when you must provide information to customers, the task is efficient, accurate, and automatic. For an audit, you need only to run a report to obtain the information you need.

THE DECISIONS DIFFERENCE

The complexity of the financial services industry requires technology that works with users, not against them. Decisions offers a fully customizable platform to help implement business rules that directly support your organizational goals. Our customers rely on our solution to solve problems that have slowed them in the past. Learn more about what the Decisions platform can achieve for your organization by requesting a demo today.

If you are interested in learning more about how Decisions can help the customer centric industry of financial services with our software, then contact us today to see our platform in action. Find out just how easy it is to run the rules and workflows that help work with your team to solve problems and achieve success.

ABOUT DECISIONS

Decisions is a leading provider of no-code, business process automation software, headquartered in Chesapeake, VA. Decisions technology is deployed as the basis of multiple commercial applications in healthcare, life sciences, finance, logistics, and operations software. It is used directly by companies on almost every continent, ranging from mid-size companies to many Fortune 500 corporations.

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