



# Business Transformation

## Enhanced Customer Experience & Operational Efficiency

A **digital-first** approach with deep **domain expertise** led by experienced **consultative** practitioners driving business process excellence.



Banking and Financial Services  
Business Process Solutions

## BANKING AND FINANCIAL SERVICES

Coforge BPS drives Business Transformation in Banking & Financial Services through a digital-first approach, deep domain expertise, led by experienced consultative practitioners.

We support over 600 processes across **Retail & Commercial Banking, Wealth Management, Capital Markets/ Investment Banking and related financial services**. We have over 20 years of experience working on Transformation solutions for Banks & Financial Services institutions, including 2 Fortune 100 Global Banks and 5 of the Top 25 Banks in the U.S.

## TRANSFORMATION AT THE INTERSECT OF DOMAIN & TECHNOLOGY

We follow a consulting led domain centric approach to reimagine processes enabled with Coforge's 30+ active digital assets to deliver:

### Business Transformation

- 40% faster turn time to market
- 35% cost saving

### Enhanced Customer Satisfaction

- 4.5/5 CSAT score for a Top 20 U.S Bank

### Operational Excellence

- 20% turn time improvement
- 99.5% accuracy in operations

## WHY COFORGE BPS



**Banking Operations Expertise**  
Deep banking domain knowledge



**Strategic Partnership**  
Preferred vendor for long term engagement



**Resource Flexibility**  
Global operations at scale



**Reducing Cost Base**  
Evolving commercial models



#### Our Professionals Process

**480M** Lockbox entries | **48M** Check Items | **2M** Card Disputes | **\$7M** in Card Deposit Fraud | **1M** card servicing requests - annually



## OUR CAPABILITIES



### Retail Banking & Cards

- Account Opening
- KYC & AML
- Account Maintenance & servicing
- Consumer Operations
- Cards/Disputes
- Check/Lockbox Processing
- Reconciliation
- Fraud Management
- Risk Management



### Capital Markets

- Account Opening & Onboarding
- KYC & AML
- Account Admin
- Security Set up & Pricing
- Account Transfer
- Traditional Assets Income
- Settlements
- Reconciliation
- Correction & Reversals
- Reporting



### Commercial Banking

- Account setup & servicing
- Commercial Lending
- Financial Statement Spreading
- Risk Management
- Payment & Treasury Management
- Cash Management/ Transaction Posting
- Fraud Management



### Wealth Management

- Account Opening & Onboarding
- KYC & AML
- Retirement Benefit Services
- Reporting
- Correction & Reversals
- Reconciliation
- Brokerage Services
- Security Services

## SOLUTION ENABLERS



### Customer Experience

- CX Transformation
- Digital-First Omnichannel Services
- Workforce Transformation
- AI-Driven Smart Processes



### Finance & Accounting

- Procure to Pay/ Payables
- Order to Cash/ Receivables
- Record to Report
- HNI, Family Offices
- Controllership



### Information Security

- Risk Management
- IT Security/ Monitoring
- Id & Access Management
- Vendor Management
- Business Continuity



### Reporting & Analytics

- Data Analytics
- Data Governance
- Data Quality
- Data Architecture
- Master & Reference Data

## DIGITAL ENABLERS



Automating QC, Risk Management & Regulatory Compliance



Intelligent Document Processing



Business Consulting Framework for Process Transformation

## CASE STUDIES



**Driving to six sigma (99.9986%) accuracy levels in retail & wholesale lockbox processing**



**30% reduction in staffing & 99.5% accuracy achieved in financial statement spreading**



**Deposit fraud items worth \$500m detected in 5 months for a bank**



**35% savings and enhanced customer satisfaction for a centralized commercial banking support center**

## About Coforge Business Process Solutions

Coforge is a global digital services and solutions provider, that enables its clients to transform at the intersect of domain expertise and emerging technologies to achieve real-world business impact. Coforge leads with its product engineering approach and leverages Cloud, Data, Integration and Automation technologies to transform client businesses into intelligent, high growth enterprises.

Coforge BPS drives Business Process Excellence using deep domain expertise and Technology platforms led by consultative practitioners. Coforge BPS customers include 5 of the Top 25 U.S. Banks, Top 10 Lenders, Top 10 Insurance intermediaries, and Fortune 500 Companies.

Our optimal blend of people, process, and digital solutions across the business value chain has helped drive tangible outcomes for our clients, their customers and partners.



Banking &  
Financial Services



Mortgage, Title Insurance  
& Property Tax



Insurance



Travel, Transport  
& Hospitality

# Coforge



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