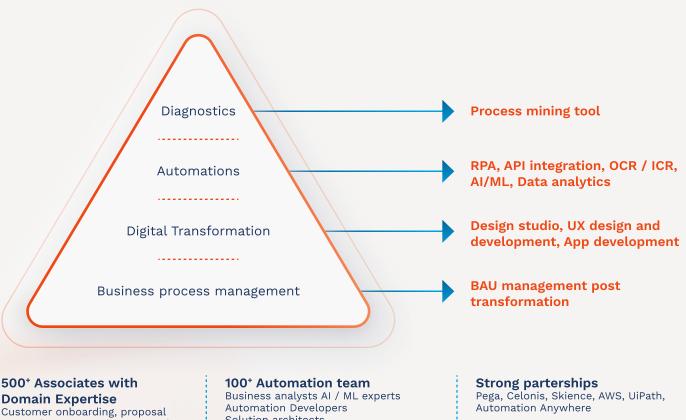
End to end Operations Transformation Solution for Wealth Management

Our Operations Transformation Solution

helps you gain a competitive edge in fast evolving technology world.

- Improved operating margins
- Faster & accurate execution resulting in better customer experience
- Provides agility to focus more on core business

Incedo's is a Wealth Management specialist with deep domain, data, and emerging technologies expertise. Our operations transformation practice helps increase efficiency and profitability by leveraging deep domain expertise, technology, data and digital teams, across the value chain.



Domain Expertise Customer onboarding, proposal

generation, transaction processing. data management etc.

Solution architects



Incedo Operations Transformation Solution

Diagnostics

Provides key insights / root causes for key pain areas of the organization; followed by recommendations with short and long term roadmap.

Incedo's operations transformation practice provides a holistic solution, enabling firms to drive efficiencies, improve margins and customer satisfaction. It delivers key insights on the current processes through thorough diagnosis, identifies the improvement opportunities and implements the changes with the help of cutting edge technology levers.

Automation / Digital Transformation

Implement the transformational changes using various technologies including IT development, RPA, digital transformation, data analytics etc.

Business process management

Manage the transformed operations and drive continous improvement year on year.

We embark on the improvement journey

within a couple of months:

We deploy a cross functional team comprising of domain experts, data analysts, technology experts and design professionals to assess end to end process and come up with:

- A diagnostic report of the operations processes detailing out non-value adds, automation opportunities and improvement areas
- 2 speed implementation roadmap for immediate solutions to bring in financial impact and long term sustainable growth
- Improved business margins in the first year of implementation
- Scope for modernising the legacy systems

Impact: Our Operations Transformation will help you gain competitive edge against the peer firms

- Reduction in operations cost by up to 25%
- Up to 30% improvement in NPS scores
- Omnichannel experience customization options
- Outcome based KPIs identification, design, tracking and reporting
- 5 Improved client reporting

About Incedo

Please Email us at: wm@incedoinc.com

Incedo is a digital transformation expert empowering companies to realize sustainable business impact from their digital investments. Our integrated services and platforms that connect strategy and execution, are built on the foundation of Design, AI, Data, and strong engineering capabilities blended with our deep domain expertise from digital natives. With over 3,000 professionals in the US, Canada, Latin America, and India and a large, diverse portfolio of long term, Fortune 500 and fast-growing clients worldwide, we work across financial services, telecom, product engineering, and life sciences industries. Visit our website to learn more about how we help clients transform today: www.incedoinc.com