

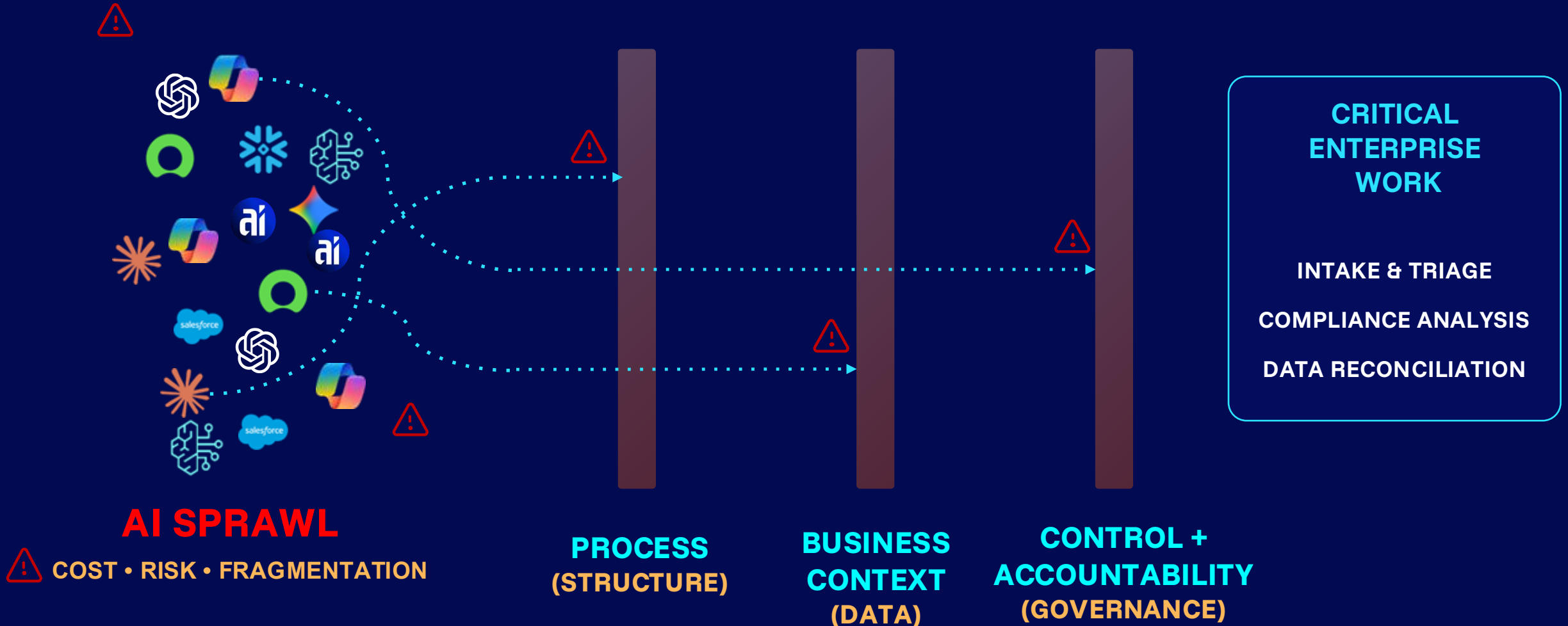
BRIDGING THE AI VALUE GAP FROM AUTOMATION TO ENTERPRISE AI AT SCALE



GREGG ALDANA
Senior Vice President
Head of Global Solutions Consulting

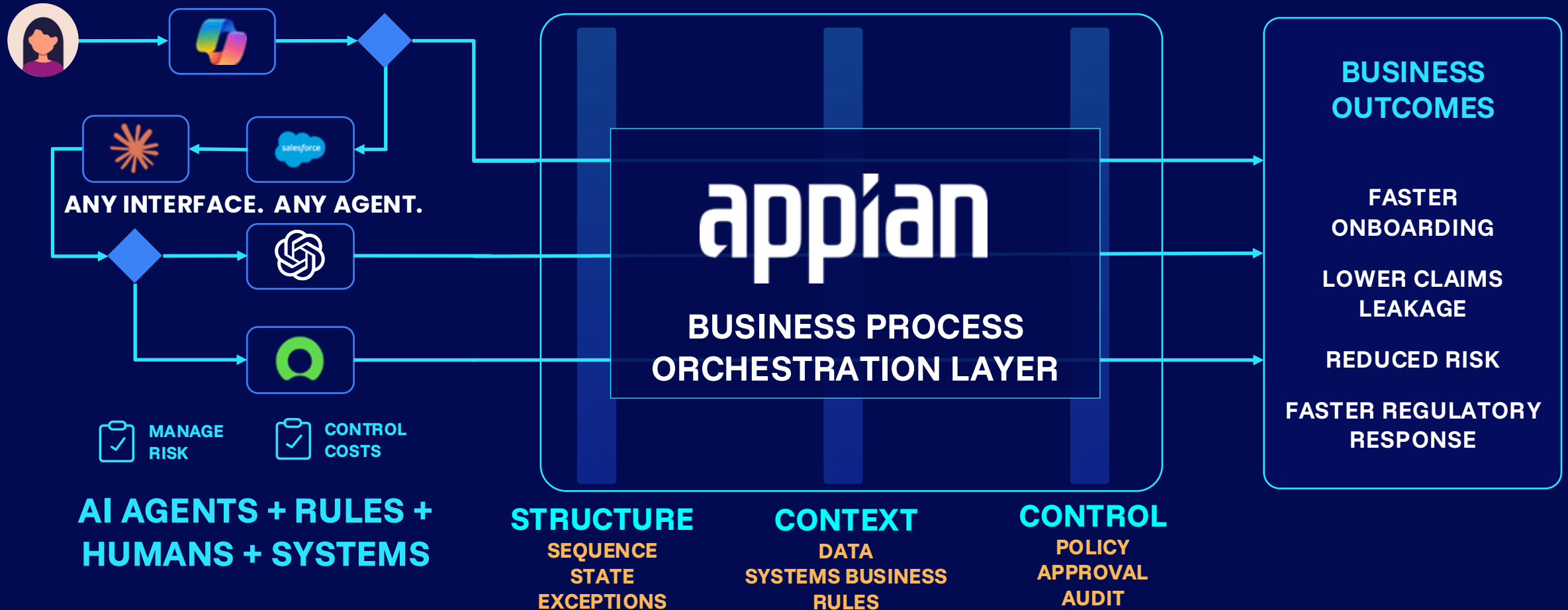
AI IS **BLOCKED** FROM CRITICAL WORK

**AGENTS CAN REASON AND ACT.
THEY STILL CANNOT MANAGE ENTERPRISE WORK END-TO-END.**



PROCESS IS THE BRIDGE

FROM ISOLATED INTELLIGENCE TO COORDINATED ENTERPRISE EXECUTION



AGENTS COMPLETE TASKS. PROCESSES DELIVER OUTCOMES.

APPIAN'S ENTERPRISE AI ORCHESTRATION PLATFORM

WITH **PROCESS** AT THE CORE

PROCESS

ORCHESTRATES THE WORK

DATA FABRIC

PROVIDES TRUSTED
BUSINESS CONTEXT

EXECUTION

AI • RULES • BOTS • HUMANS

GOVERNANCE

CONTROL • TRANSPARENCY •
ACCOUNTABILITY

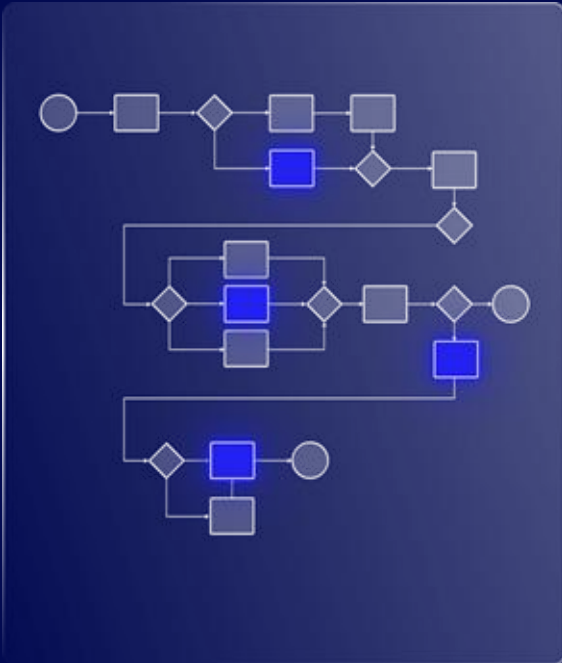
appian

ENTERPRISE AI ORCHESTRATION

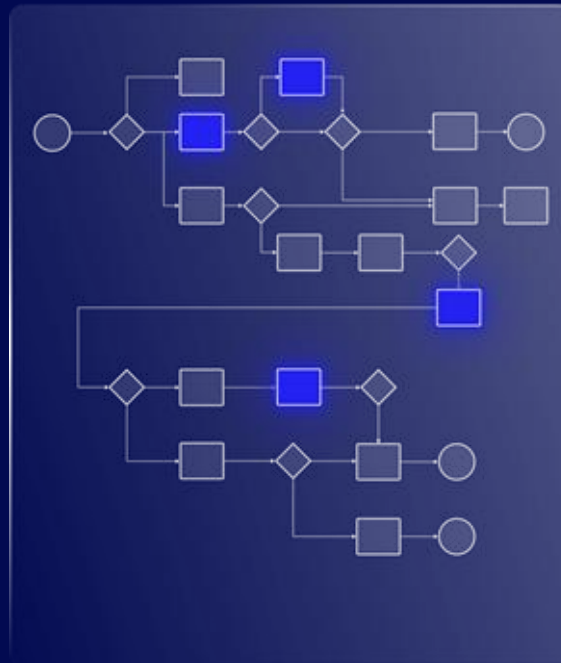
AI + RULES + PEOPLE + DATA + SYSTEMS → BUSINESS OUTCOMES

AI MAKES PROCESS EFFICIENT

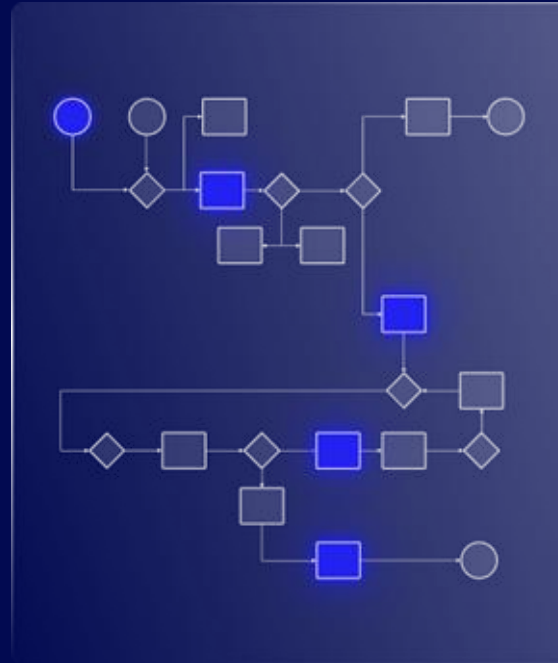
CUSTOMER ONBOARDING



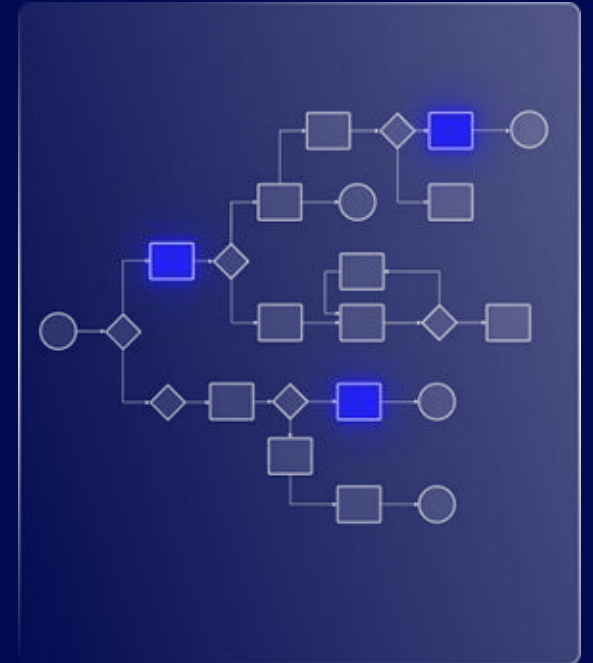
LOAN ORIGINATION



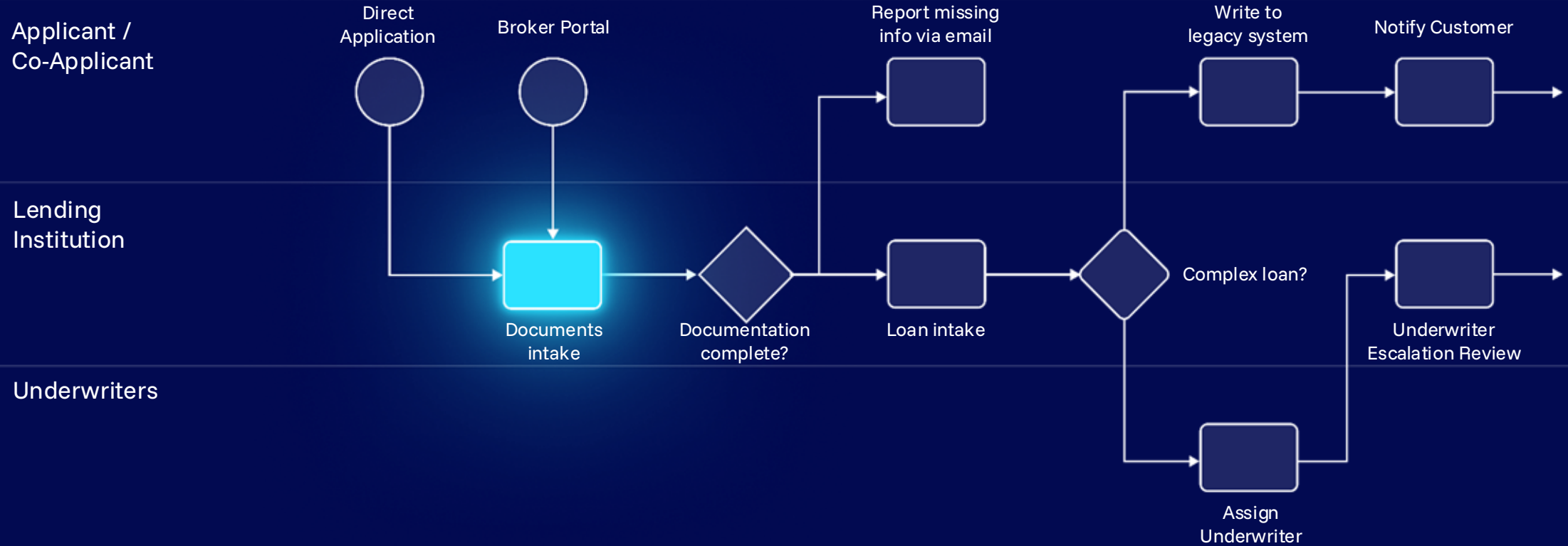
CLAIMS MANAGEMENT



PROCURE TO PAY



LOAN ORIGINATION





END-TO-END DOCUMENT AUTOMATION IS **BUILT ON PROCESS**



RANKED #1 in Automated Processing
Use Cases for IDP by Gartner®

Loan Application

Loan Application

Mortgage Insur

Loan Origination

LO_LoanIntake

Underwriter_E

aw26-keynote.appian-sites.net/suite/sites/doc-center/group/classification/page/classification-models/record/sUt9lyh6VTPxi2F7H...

DocCenter

Home

Extraction

Classification

Models

Instances

Deployment

Documentation

Loan Application Document Sorting

SummaryInstancesTestingVersionsPromptTriggers

Model Details

Latest Version Accuracy

100%

A multi-document classification model designed to categorize the customer's supporting documents for their loan application

Vision Based Classification

Packet Splitting

Latest Version

Model Key

Version 1

loanApplicationDocumentSorting

Last updated Mar 31, 2026 by System

Latest Instances

View All

#0041

LO Doc Packet Dan - S

Apr 26, 2026 3:35 PM

#0040

LO Doc Packet Dan - S

Apr 26, 2026 2:03 PM

#0039

LO Doc Packet Dan - S

Apr 26, 2026 12:28 PM

#0038

LO Doc Packet Dan - S

Apr 25, 2026 7:39 PM

#0037

LO Doc Packet Dan - S

Apr 24, 2026 2:08 PM

Classification Categories

Category

Paystub

Bank Statement

Tax Document

Identity Document

Application

Other

2 - LO Doc Packe...

Page 1 of 7

1

2

3

4

Social security wages 85000.00		Social security tax withheld 5270.00	
Medicare wages and tips 85000.00		Medicare tax withheld 1232.00	
Control number 99873-A	Dept	Corp	Employer use only
Employer's name, address and ZIP code TECHCORP INC. 999 TECH BLVD AUSTIN, TX 78759			
Employer's FED ID Number 12-3456789		Employee's SSA number XXX-XX-1111	
Social security type		Allocated type	
Nonqualified plans		Dependent care benefits	
Other		See instructions for box 12	
Employee's name, address and ZIP code JOHN A. DOE 123 MAPLE ST AUSTIN, TX 78701		State wages, tips, etc	
State		State income tax	
Local income tax		Locality name	
Federal Filing Copy Wage and Tax Statement		2025	
Copy B to filed with employee's Federal in			

DRIVER LICENSE

DL NO: TX-88992233
DOB: 05/14/1982 EXP: 05/14/2030
ISSUED: 05/10/2022
DOE, JOHN A.
123 MAPLE ST
AUSTIN, TX 78701
CLASS: C
REST: A
SEX: M | HT: 5'11" | EYES: BRN | END: NON
John A. Doe
SIGNATURE OF LICENSEE



AI POWERED UNDERWRITING

EXTRACTING ATTENDING PHYSICIAN STATEMENTS (APS)

75%

Decrease in underwriting
time to review

98%

Accuracy of
extracted fields

6,833

Hours freed
up annually

\$532K

Additional annual
revenue potential



NORTH AMERICAN FINSERV COMPANY

AI POWERED AML (ANTI MONEY LAUNDERING) SUSPICIOUS TRANSACTION REPORTING

38

seconds to gather data
for investigation

6

Legacy Systems
Integrated

76%

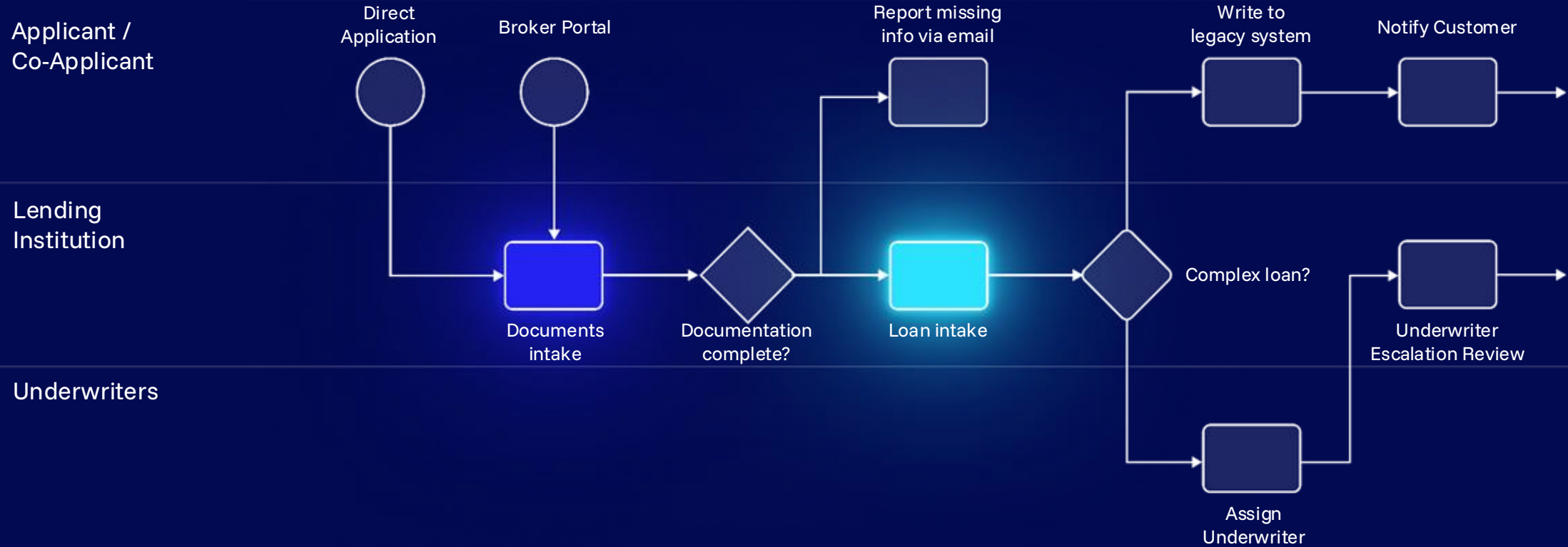
risk reduction in
financial crimes

98%

reduction in
investigation time



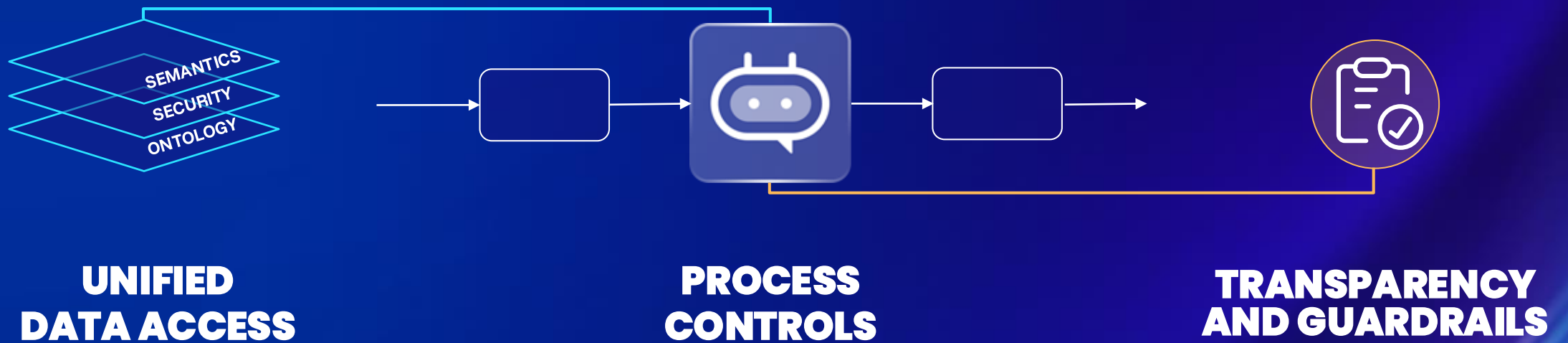
LOAN ORIGINATION



**VARIABLE INPUTS
IMPERFECT DATA
COMPLEX EXCEPTIONS**



AGENTS AUTOMATE COMPLEX WORK





Configure

Instructions

Explain the AI agent's goal and any specific instructions it needs to follow

Edit

Preview

You are the lead intake agent. Your job is to compare the applicant's extracted document data against our internal ledger, verify the associated property details, and route the application.

Lookup any active loan application to associate with this intake request.

Ensure you review underwriting and risk routing policy for latest guidance before making any final determination.

Look at the data for the retrieved application. Note the 'Stated Annual Income' and the property address. Execute the Customer_Ledger tool using the applicant's SSN. Compare the Stated Income against tl2008/64000
current balance and recent flag

Tools (4)

Inputs (1)

Outputs (2)

Advanced

Add tools to give your AI agent access to data and the ability to perform actions

+ ADD



LO Customer Ledger

Sourced from Core Banking System (CBS). Captures financial transaction details to support customer account man...

[More](#)



LO_Fraud_Agent

Looks for fraud markers



LO Automated Underwriting & Risk Routing Policy

Document containing bank's current underwriting guidelines and risk thresholds.



LO Loan Application

Record of all submitted loan applications



Test



Test your AI Agent

Enter input values for the AI agent, then select Test to see a response

Load Inputs

LOAD FROM TEST CASES ▾

CLEAR INPUTS

customerId

Text

Enter a value

Abc ▾

TEST

Accuracy ⓘ

100%

10 feedback scores

Total Tests ⓘ

10

10 of 10 tests completed

Average Duration ⓘ

106.4s

Total duration: 1064.3s

Test Cases (10)

	Olivia Anderson - Medium Risk (CUST-010)	1 feedback score	100%	>
	William Taylor - Low Risk (CUST-009)	1 feedback score	100%	>
	Jessica Moore - High Risk (CUST-008)	1 feedback score	100%	>
	James Wilson - Low Risk (CUST-007)	1 feedback score	100%	>
	Emily Davis - Medium Risk (CUST-006)	1 feedback score	100%	>
	David Brown - Low Risk (CUST-005)	1 feedback score	100%	>
	Sarah Williams - High Risk (CUST-004)	1 feedback score	100%	>
	Michael Johnson - Medium Risk (CUST-003)	1 feedback score	100%	>

 **RISK FLAG** ID Address Mismatch. Cannot proceed to approval.

Applicant's Info

Information as submitted by the applicant and extracted from uploaded documents.

Applicant Name

Michael Johnson

Application Address

789 Pine Ln, Denver, CO

Government ID Address

9876 Flatirons Way, Boulder, CO

Loan Purpose

Home Purchase

Requested Loan Amount

350000

Submitted Documents

-  W-2 Tax Form (2025)  Extracted
-  Proof of Address  Extracted
-  Government ID  Flagged

AI Investigation Findings

Automated analysis generated by the AI Intake, Fraud Detection, and Core Banking agents.

Agent Confidence Scores

Data Extraction

99.2%

Income Verify

99.8%

Identity Verify

Flagged

Key Findings

-  **Address Mismatch** - Application address (Denver, CO) contradicts Driver's License address (Boulder, CO)
-  **Missing Stipulation** - Proof of residency at Denver address is required
-  **Approval Blocked** - Underwriting cannot proceed until identity exception is cleared

 Multi-Agent Audit Log

3 agents involved

Intake Agent successfully extracted application data. However, the Fraud & Identity Sub-Agent detected a compliance discrepancy: The address on the uploaded Colorado Driver's License (Boulder, CO) does not match the current residential address provided on the loan application (Denver, CO). Manual review and external verification required to proceed.

 Underwriter Assistant





ACCLAIM AUTISM

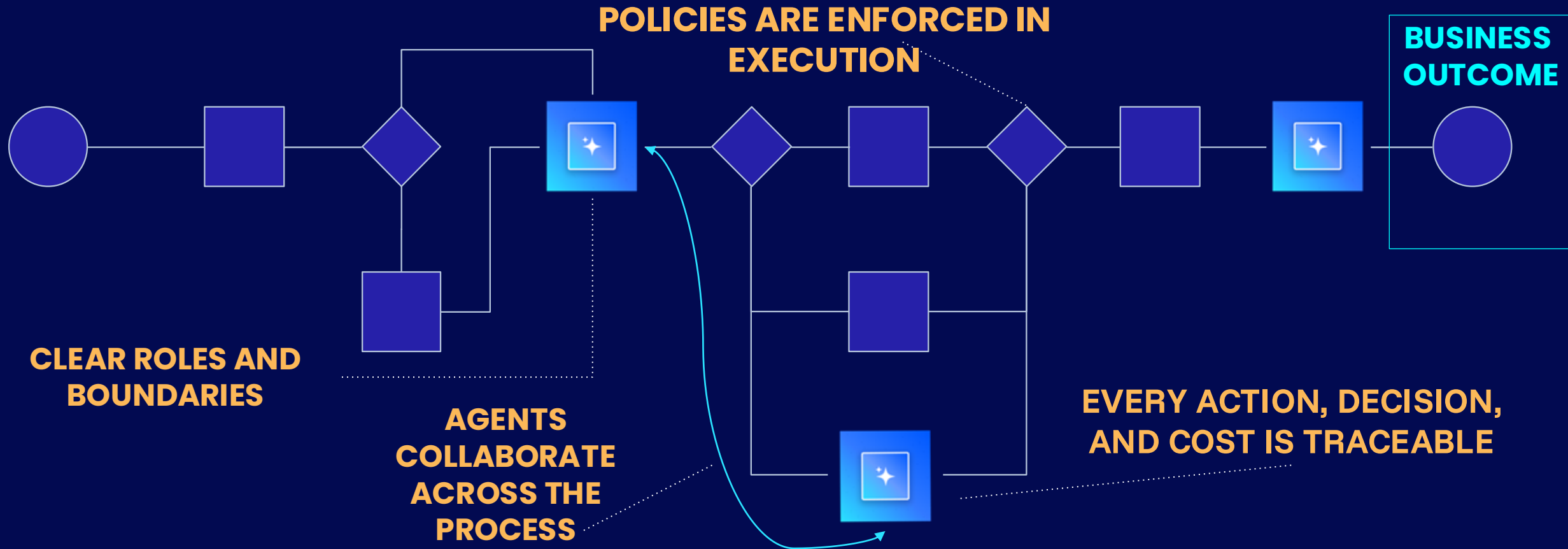
98% FASTER PATIENT INTAKE

AI AGENT-BASED CLINICAL
SCHEDULING HELPED REDUCE
PATIENT INTAKE FROM
6 MONTHS TO 4 DAYS



AI AGENTS NEED AN ORCHESTRATOR

INDIVIDUAL AGENTS CAN PERFORM TASKS. BUSINESS OUTCOMES REQUIRE COORDINATION.

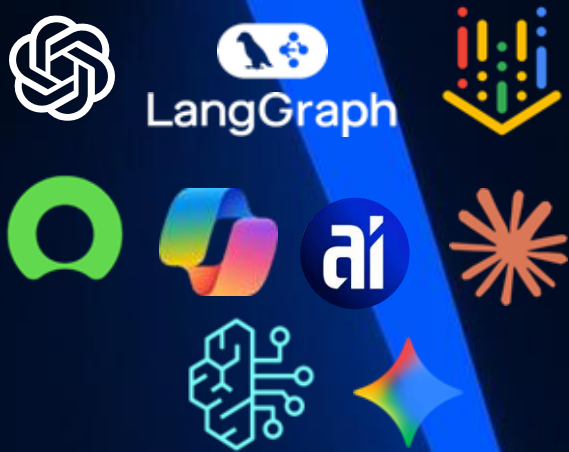


**THE VALUE IS NOT THE AGENT.
THE VALUE IS THE OUTCOME THE AGENTS COLLECTIVELY DELIVER.**

AI AGENTS NEED BUSINESS CONTEXT

DATA FABRIC PROVIDES ONE GOVERNED CONTEXT LAYER ACROSS ENTERPRISE DATA

AI AGENTS



DATA FABRIC

UNIFIED BUSINESS CONTEXT

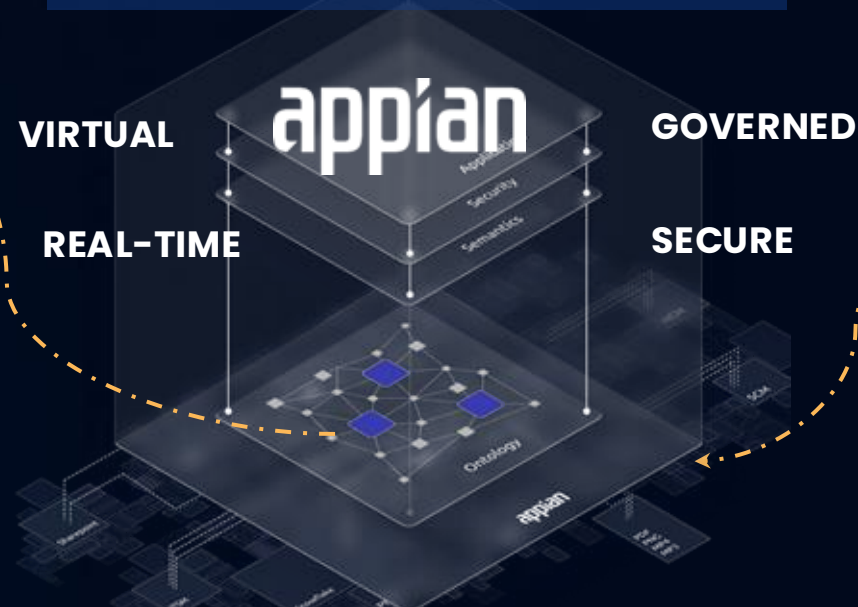
VIRTUAL

REAL-TIME

appian

GOVERNED

SECURE

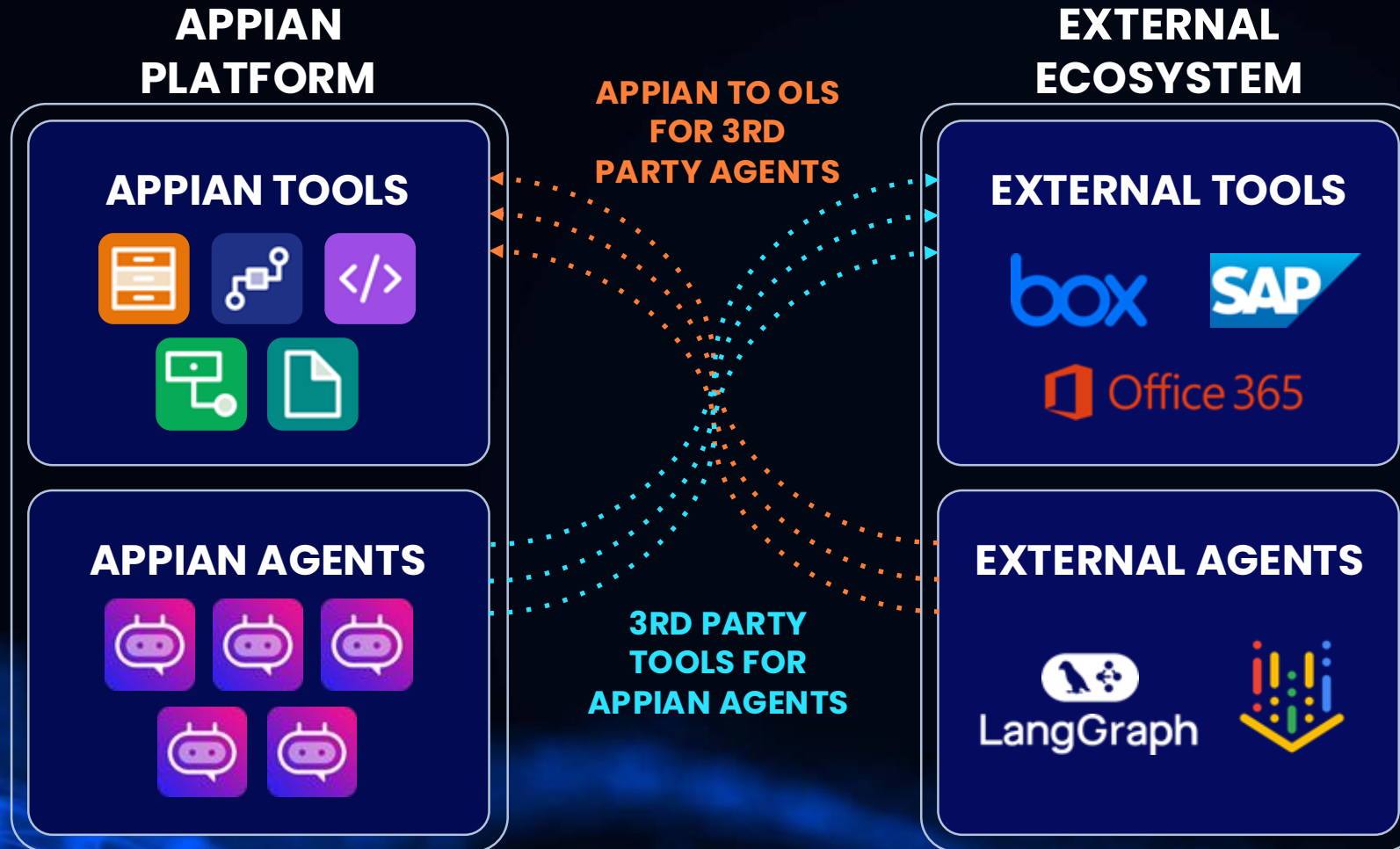


ENTERPRISE DATA



KEEP THE DATA WHERE IT LIVES.
GIVE EVERY AGENT THE CONTEXT IT NEEDS.

AGENT INTEROPERABILITY WITH MODEL-CONTEXT PROTOCOL (MCP)



- + New chat
- Projects
- Artifacts
- Customize

Pinned

Drag to pin

Recents



Afternoon, Megan

How can I help you today?



Opus 4.7



</> Code

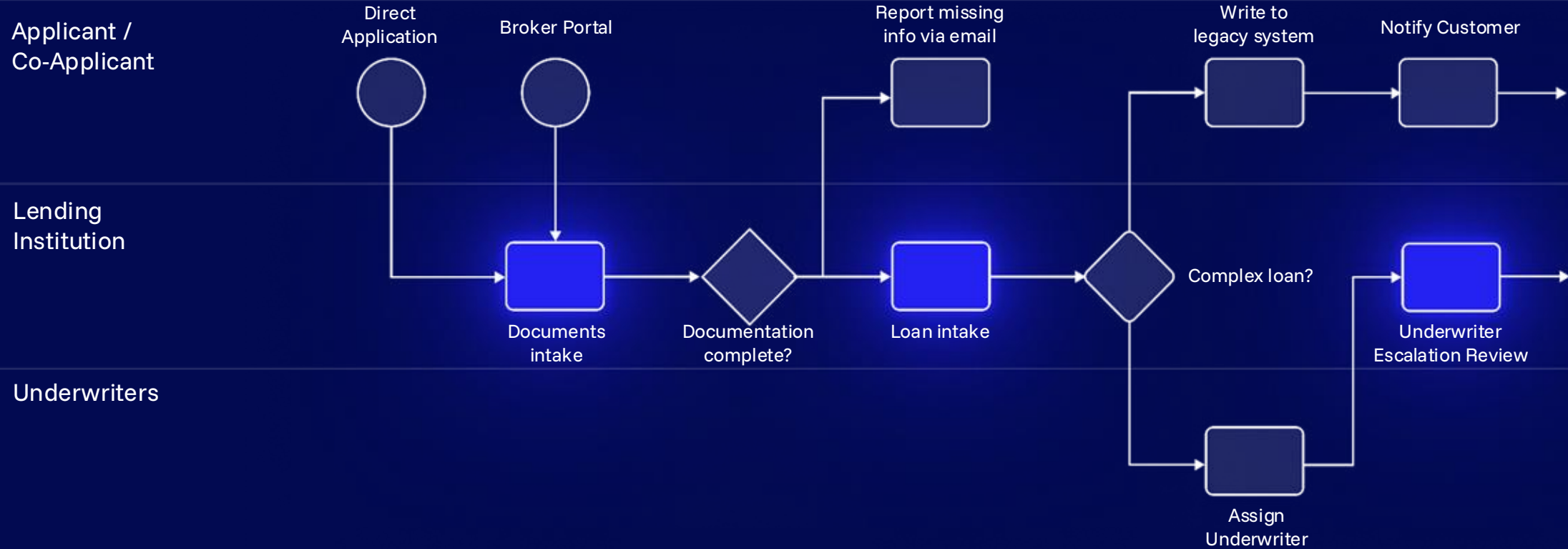
Strategize

Create

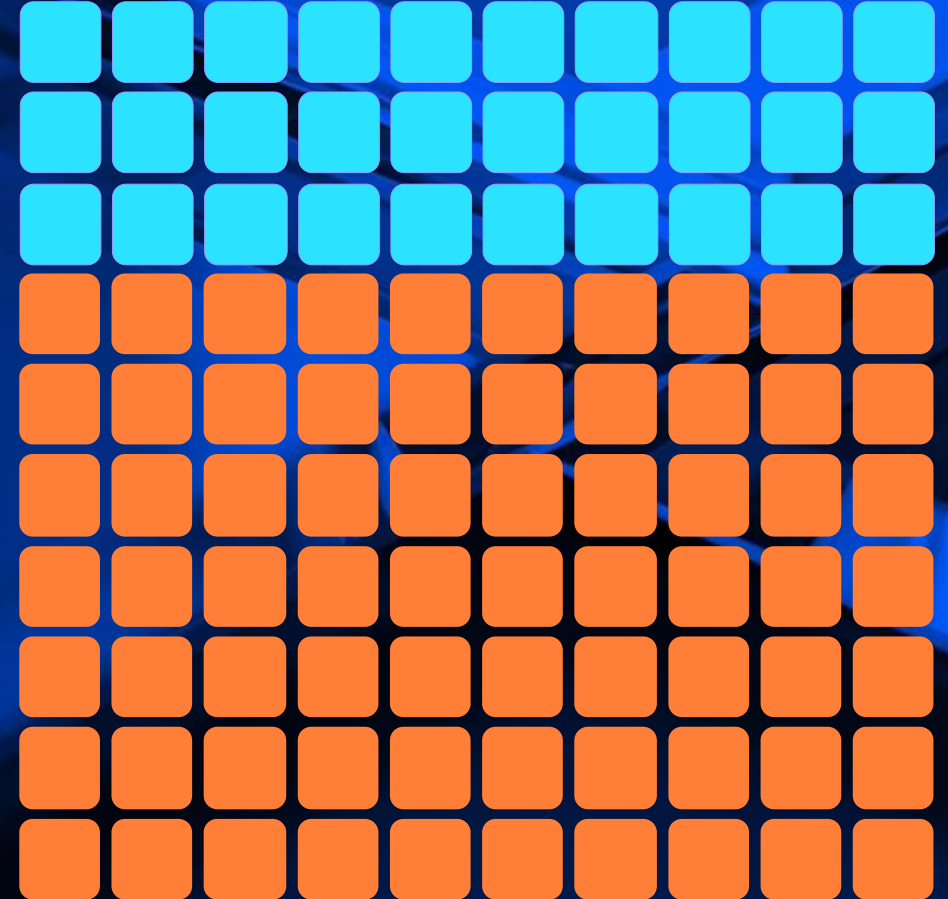
Write

Learn

LOAN ORIGINATION



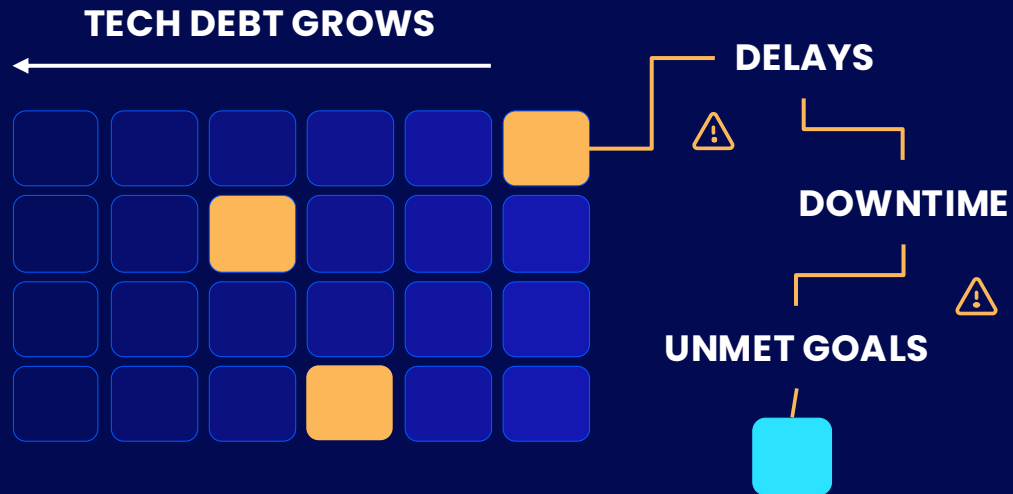
**UP TO 70% OF
SOFTWARE POWERING
THE FORTUNE 500 IS
OVER 20 YEARS OLD.¹**



1. Nia Batten, "Fix it, even if it 'ain't broke': The price of legacy technology," TechRadar, October 11, 2023.

RETHINK MODERNIZATION

TRADITIONAL METHODS HAVE **LOW ROI**



VIBE CODING ALONE **ADDS RISK**



*Application Modernization:
Leveraging AI with
Confidence. June 2026.*

“Without proper **governance**, AI-generated code may lack **consistency, security, and alignment** with organizational standards.”

APPIAN AI vs VIBE CODING?

SPEC-DRIVEN DEVELOPMENT WITH AI – BUILT FOR THE ENTERPRISE

ENTERPRISE-GRADE SECURITY

Governance & Compliance by Default

YOUR DATA STAYS SECURE

Unified Data Fabric.

FAST GOVERNED DEPLOYMENTS

From Spec to Production.

OPEN AGENT MODELS

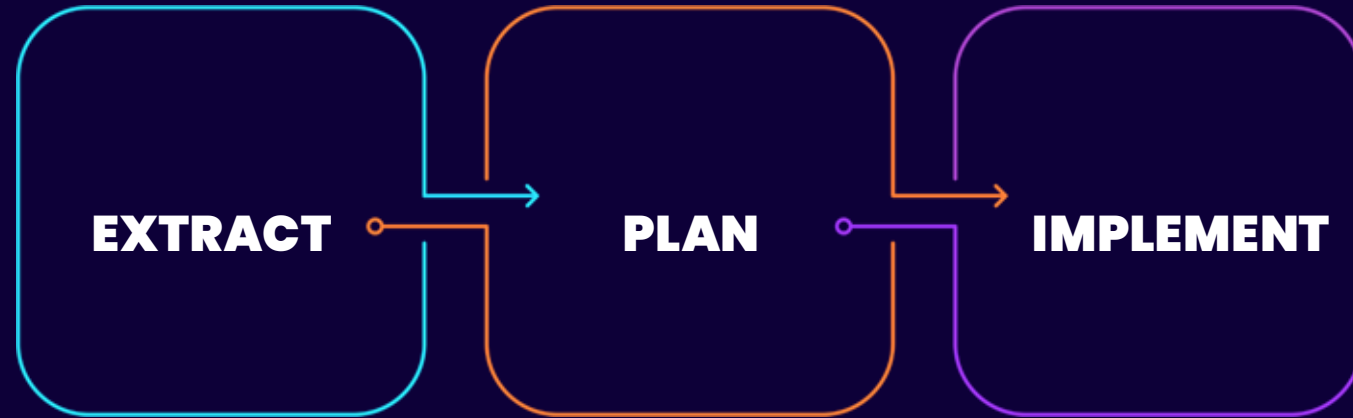
Claude, GPT, Gemini – your choice

SPEC-DRIVEN AI – **SAFE BY DESIGN** – ENTERPRISE READY

A group of people are gathered around a table in a meeting. Several hands are visible, pointing at a tablet that displays various charts and graphs. The scene is brightly lit, with a warm glow from a light source on the right. The background is slightly blurred, showing more people and office equipment.

SPEC-DRIVEN DEVELOPMENT WITH ENTERPRISE CONTROLS

SPEC-DRIVEN DEVELOPMENT



BUILD WITH CONFIDENCE

DEVELOPING IN APPIAN WILL NEVER BE THE SAME

TRADITIONAL



COMPOSER



AI TOOLS



**CONSOLIDATED
22 LEGACY SYSTEMS
INTO 1 APPIAN
APPLICATION**

9x
**FASTER
CUSTOMER
SERVICE**

40%
COST SAVINGS



AVIVA





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Exclusively to Appian Around the World attendees

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