



AWM

ACTIVITY WORKFLOW MANAGER

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



OBJECTWAY

AWM ACTIVITY WORKFLOW MANAGER

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 paper based workflows increasing manual tasks and operational risk



Increased constraints on regulatory compliance



Constant margin erosion and increased competition deteriorating levels of commissions and fees



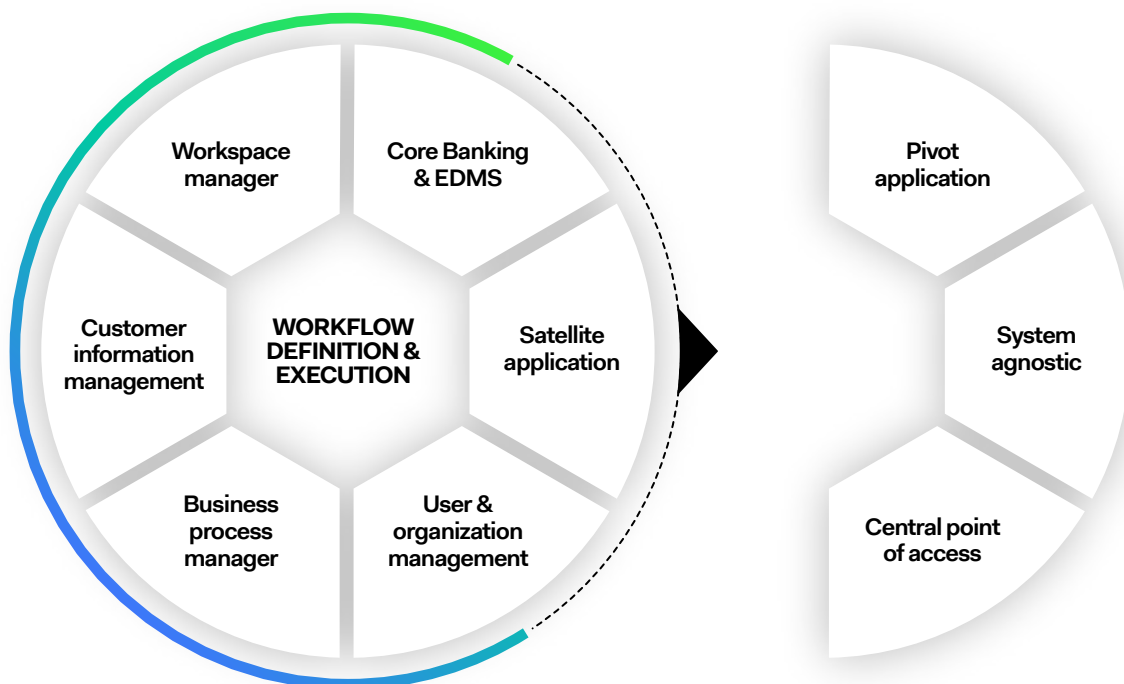
Client expectations for enhanced UX digital solutions requiring efficient integration capabilities to web and mobile applications

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

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

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.



OUR SOLUTION

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.

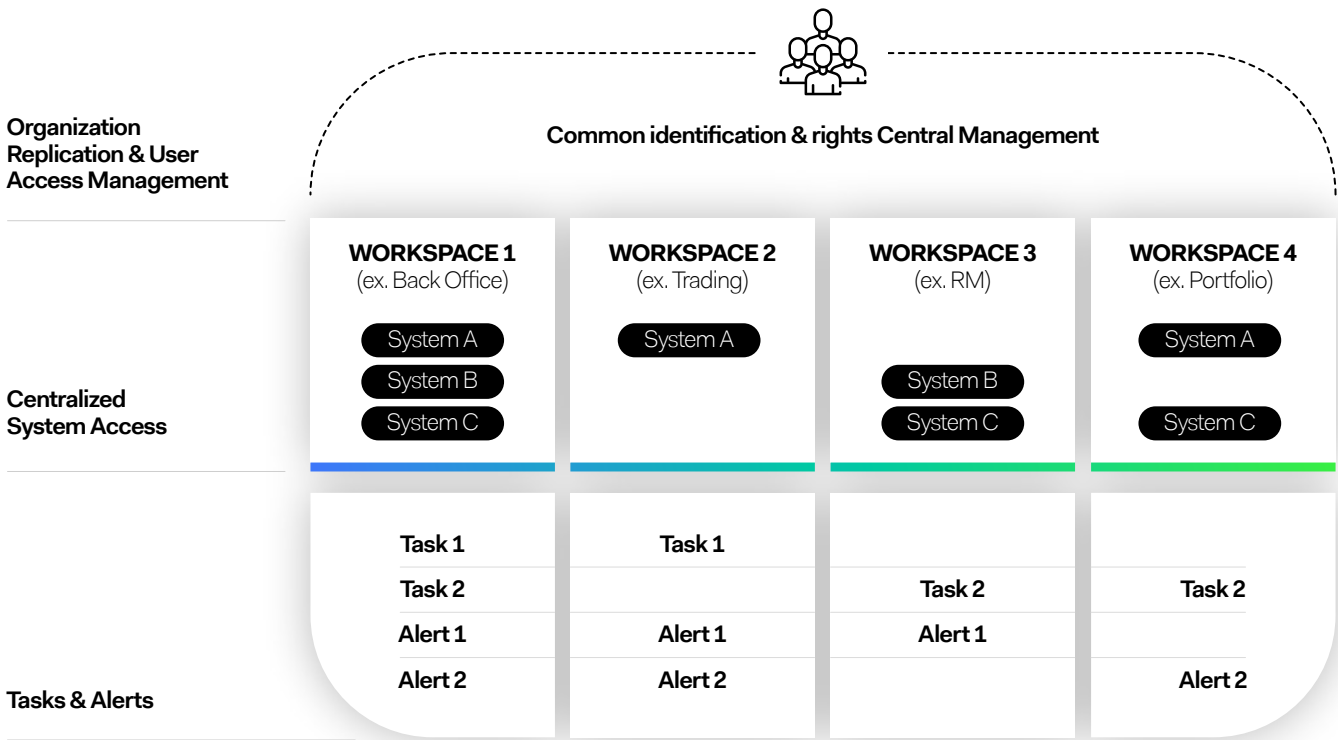
Each system, task and alert can be defined for each workplace -and its related users- and automatically programmed through the AWM solution. It allows a complete flexibility and a full automation of processes (cf Central Management organization below).

CENTRALIZED ACCESS POINT & INTEGRATION

The AWM solution is an agnostic system that can be connected to any third party application. It is natively integrated with our 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:

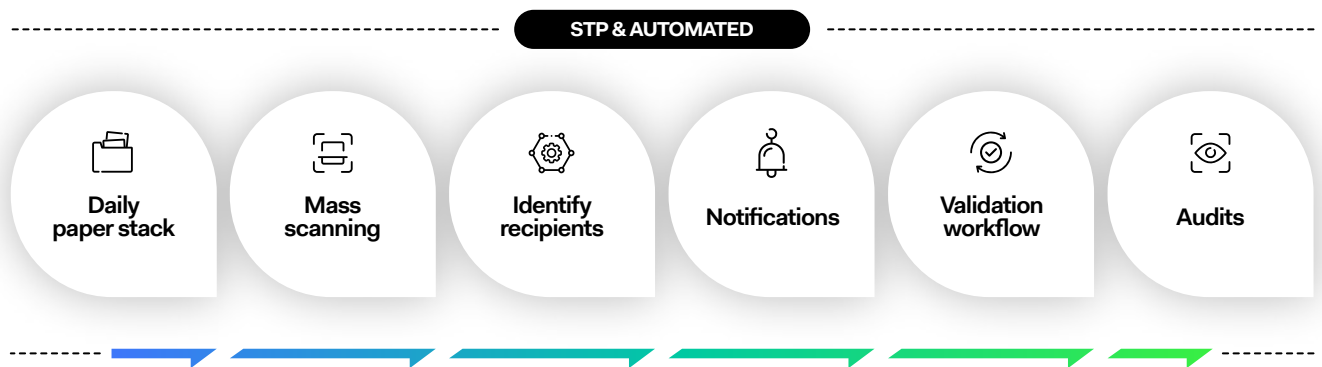
- Access all the applications used for their day-to-day work
- Receive alerts and notifications from systems or from another user
- Manage workflows and tasks.



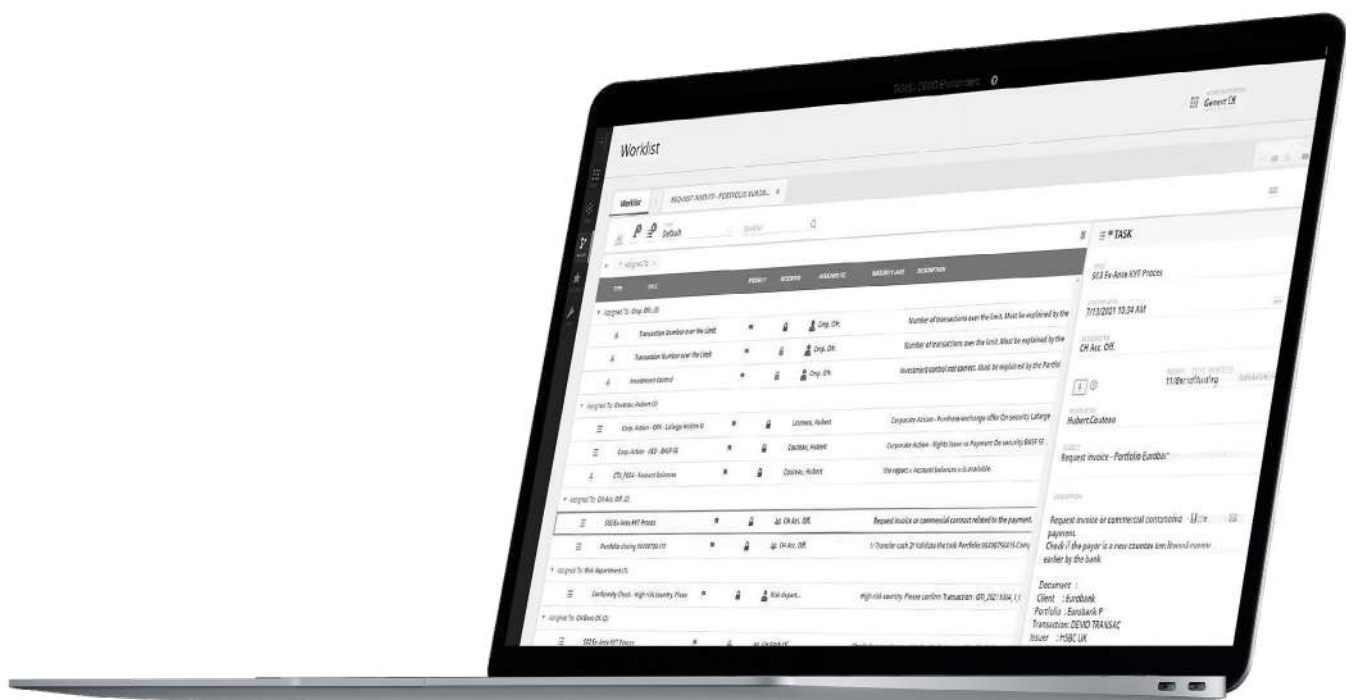
USE CASE PAPERLESS BANKING

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:



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.



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



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



CONNECTIVITY

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



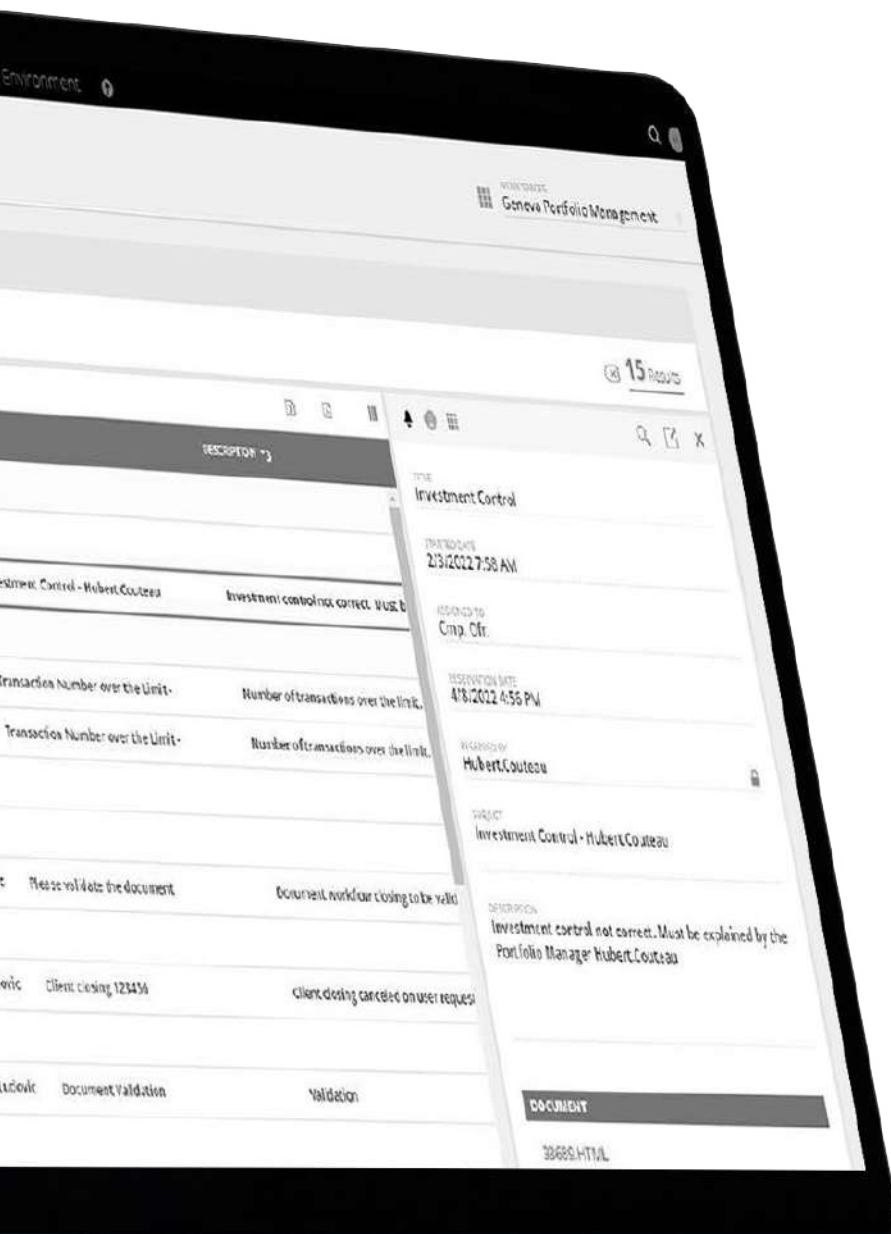
TASKS & WORKFLOWS

- 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 lists on different tools



CUSTOMIZATION

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





WHY OBJECTWAY

For over 30 years, Objectway has been a trusted partner to banking, asset and wealth management firms, delivering scalable solutions that drive performance and **empower** the **entire value chain**.

As a full-service provider, Objectway seamlessly integrates across business operations and service models, guiding clients through their transformation journey with highly **configurable solutions**.

For each business, we create a solution design that maps the business value chain, as a technology enabler or as an outsourcer, designing a specific solution for each case. Our innovation framework is aligned with the client's situation, ambitions and ultimate objectives when it comes to rationalizing existing complexity, streamlining operational processes and workflows, or transforming the operating model.

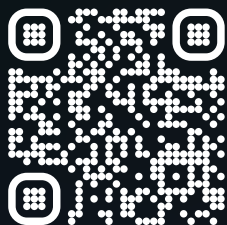
Every situation is part of an **evolutionary process**, in which we scale together, because the client's growth is our success and our shared journey towards excellence.

As a global **TOP-100 FinTech provider** (IDC FinTech Rankings), Objectway administers over €1 trillion of assets and supports more than 100,000 investment professionals (financial advisors, private bankers, relationship managers) to manage over €700 billion AUM for more than 5 million investors.

Our growth strategy, driven by both organic expansion and strategic acquisitions, has propelled us to €130 million in revenue (FY 2025). We serve 250+ leading banks, wealth managers, asset managers, and insurers across EMEA and Canada.

With a **global presence** and a team of 800+ business and technology professionals, Objectway operates from offices in Italy, the UK, Belgium, Germany, Switzerland, France, Ireland, UAE, and Canada. Our flexible solution design adapts to both global and regional structures, enabling scalable growth across customers, geographies, and the entire value chain.





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