



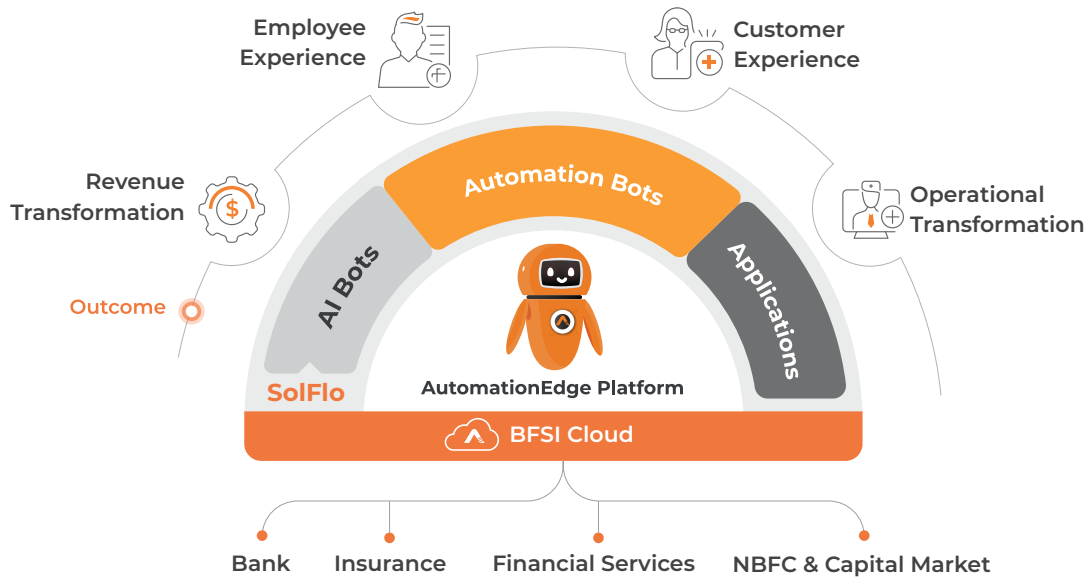
## Revolutionizing BFSI with Gen AI and Automation Platform

for Great Digital Experience and Efficient Business Process

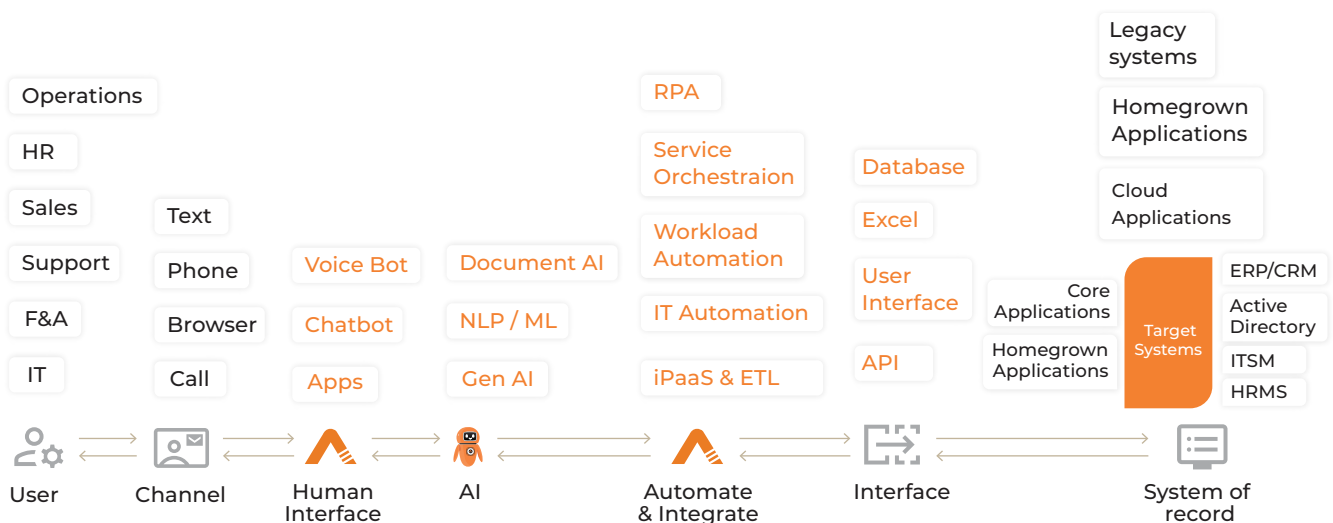
[www.automationedge.com](http://www.automationedge.com)

## AutomationEdge for Banking, Financial Services and Insurance (BFSI) Industry

In this digital age, the BFSI industry is the first to adopt new technologies. As digital systems are already making a difference in front-end and back-end services, Gen AI and Automation can streamline processes, manage customer expectations and relieve resources from mundane and repetitive tasks like data validation, comparison, system update, and so on. Having a combination of AI and Automation solutions helps in achieving higher process efficiency, and compliance at cost effective rate.



## Hyperautomation and Service Orchestration platform



## The State of Automation Vendors

### RPA Vendors

- » RPA and Document AI capabilities
- » Limited capabilities and narrow focus on platform

### IT, Data & Workload Vendors

- » Backend automation capabilities
- » Lack of front-end automation and business processes capabilities.



### Employee Support Vendors

- » Chatbot and Generative AI capabilities.
- » Limited business process automation capability.

### Domain Consultants & System Integrators

- » Domain expertise, Process Discovery, Library of use cases, System integration experience
- » High cost of consulting, gaps between system integrators and vendor, lacks accountability

## The State Of Enterprise Automation



### High Costs

- » Hidden costs and complex licensing models.
- » Multiple platforms and vendors not working together.



### No Skin In The Game from Software Vendors

- » Lack the involvement for the outcomes
- » Inconsistent implementation & inferior quality of service.



### Struggle To Scale

- » Projects stagnate after the pilot phase and task automation.
- » Limited success for complex use cases.

## AutomationEdge - The Universal Automation Platform

### Reduce Total Cost Of Ownership Up To 50%

Achieve enterprise-wide automation without breaking the bank.

### Multiple Automation Capabilities

Gen AI, ML, RPA, ITPA, Doc AI, Conversational AI, ETL, Workload Automation

### Deep Involvement in Engagement

Actively involved for better solutioning and increased success rate.

### Domain Accelerators & Experience

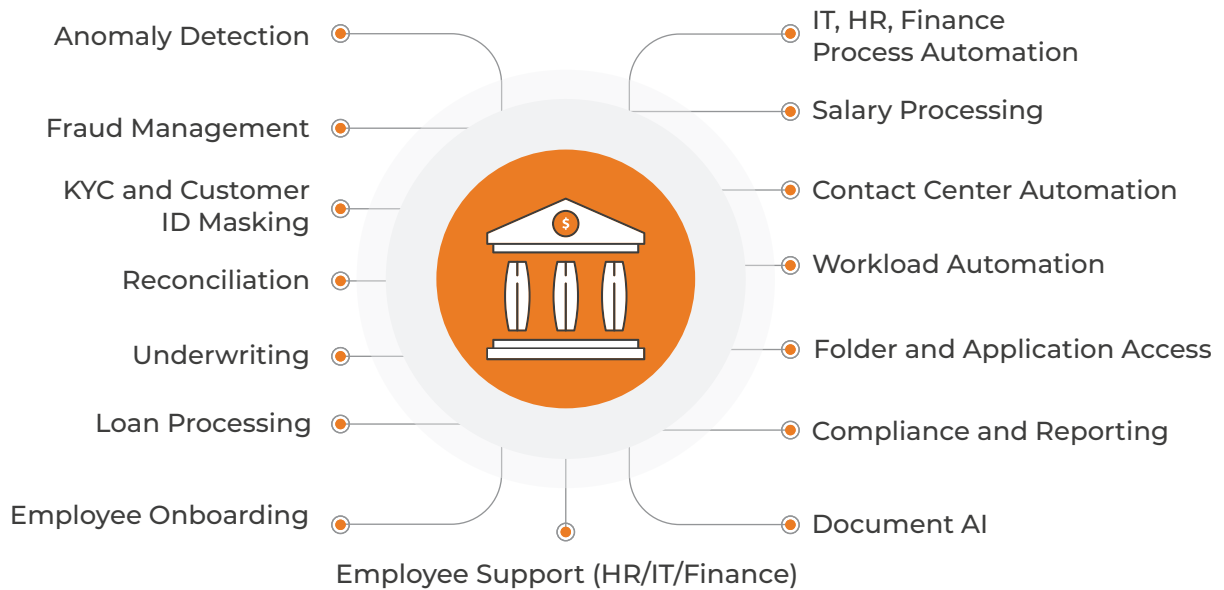
Reduce implementation risk and speed up deployment.

Banking, Financial Services, Insurance, Healthcare, Home Care, HR, IT, Employee Support

# AutomationEdge SolFlo

## Pre-built solutions for BFSI Automation

### Pre-built Banking Automation Solutions



### Areas of Automation in Banking

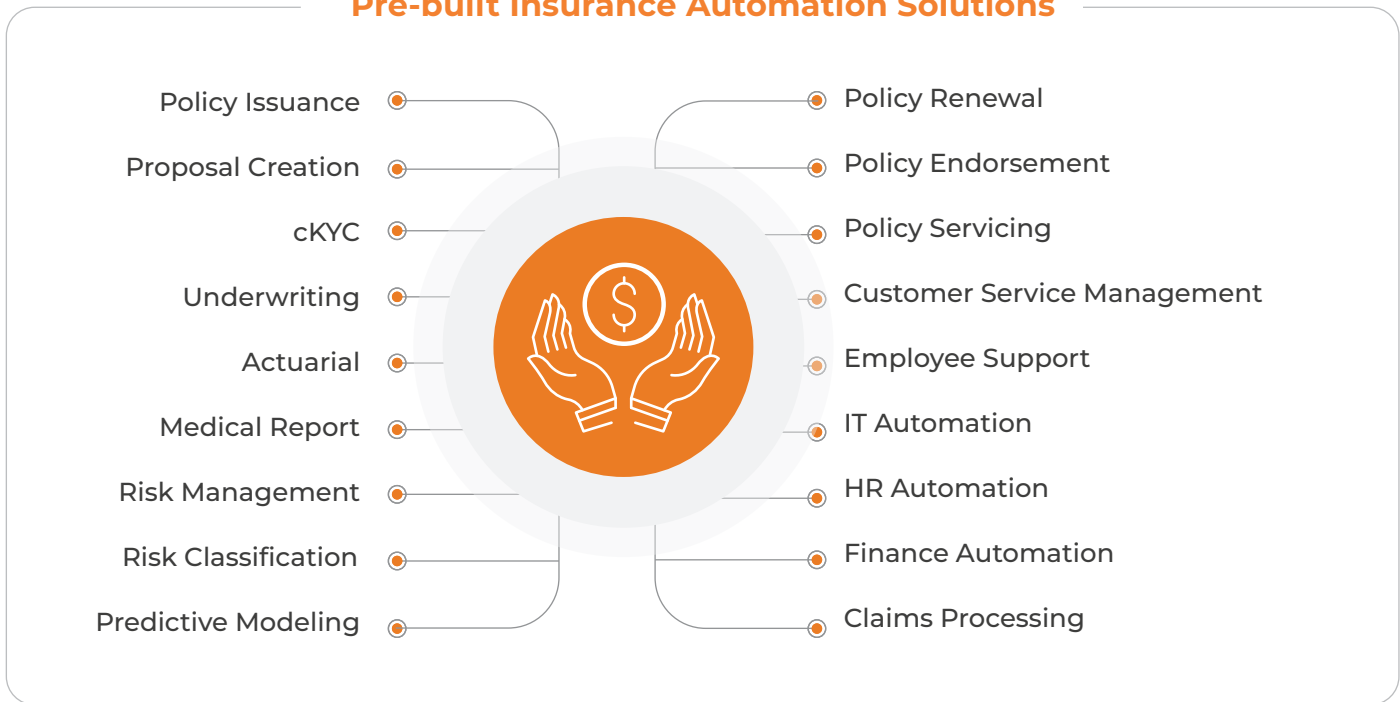


SolFlo are ready to use solutions specifically built for BFSI process automation. Pre-built solutions:

- ▶ Reduces time to market
- ▶ Cost to implement

Save up to **50%** on total cost of automation initiative ownership with our ready solutions and superior technology.

### Pre-built Insurance Automation Solutions



### Areas of Automation in Insurance



# AutomationEdge Banking Success Stories



*AutomationEdge RPA provided us the facility to identify, analyze and automate the business process and helped us in meeting our organizational goals with higher ROI.*

Ajay Kapoor, EVP, HDFC Bank

## Data Migration

- » Product Database Migration from Posgre to Oracle
- » 70% productivity improvement for automated processes
- » Average time reduction by 30%~40%
- » 20%~25% efficient project implementation due to code reusability
- » Process Go Live in every 4 days using Agile Methodology & AutomationEdge
- » Enhanced Customer & Employee Experience

## Secured & Unsecured Loan Application Process

- » 50% processing time reduced per application of loan in credit department
- » 5 million loan applications processed annually
- » Reduced Risk Intelligence to credit managers to take decision
- » Productivity of credit mangers improved by 12%
- » Productivity of data entry staff improved by 40%
- » 200 MIS Reports automated for Credit, Direct Banking & Business Banking Operations

## Agricultural Land Record Report Download Process

- » Daily 1000+ land record download requests processed in Hindi, Marathi and Punjabi with scheduled bots
- » 60% time reduction
- » 50% manual efforts saved

## Modernizing IT Service Desk

- » 10,000 Tickets resolved per month
- » 90% Improvement on TAT
- » 75% Improvement in customer satisfaction scores

## Nostro Reconciliation Process

- » Reconciliation time is reduced by 90%
- » Handles large volume of transactions with hourly reconciliation
- » Processes 1400+ transactions reconciliation daily
- » Real time reporting of un-matched transactions for human action
- » 15,000 manhours of workload reduced annually

## Email Contact Centre Automation for an AMC Customer

- » Scalable solution to process 6000+ tickets
- » End to end processing time is reduced by 66% per request
- » 8,500 manhours equivalent of workload reduced annually

## De-duplication of Loan Application Processing

- » Daily 5000 applications were scrutinized
- » Accuracy of NO MATCH is 99.98% which is approximately 30% of overall volume
- » Faster processing of loan applications resulting in faster disbursal of loans.
- » 30% reduction in manual workload

## Digital Library Process

- » Average Document Download time reduced by 40% (15 min. to 9 min.)
- » Bulk Download facility for 50+ customers
- » Bots are processing 400 document download requests daily
- » With UI Development & RPA this solution is extended to Pan India Hub
- » 10 FTE efforts saved

## AutomationEdge Insurance Success Stories



AutomationEdge's commitment to making customers succeed, with end-to-end solutions and comprehensive dashboards, sets them apart as a mature & dependable partner. Their ability to integrate cognitive decisions into workflows is truly impressive.

**Goutam Datta,**  
**Chief Information & Digital Officer**  
**Bajaj Allianz Life Insurance**

### Quote Generation to Policy Issuance

Email, Chatbot, WhatsApp Virtual assistant for quote generation to policy issuance

- » 90% policy issuance through email tool in specific categories in SME
- » 97% plus policy issuance is done electronically
- » Easy Accessibility
- » Supports marine, fire, engineering and two-wheeler products
- » Highly secure

### Policy Proposal Creation & Assessment Process

End-to-end automation solution for Life Insurance policy proposal creation process

- » 65% reduction in TAT
- » 100s of resources workload reduced
- » Audit reports generated for the performance/utilization, support the business more effectively
- » Quick defect tracking

### Actuarial Quote Creation Process

Automated calculation and creation of group insurance quotes for corporate customers

- » Quote generation time has reduced from 45 Minutes to 2 Minutes per file
- » Bots are generating quotes for 150+ corporates
- » Eliminated calculation mistakes
- » Released Actuarial team bandwidth to focus on Analytical activities

### Corporate New Business & Renewal Process for Health Insurance

Automation of new policy creation or renewal of policy for 500+ customers daily.

- » 90% reduction from 6 hours processing time for each request
- » 14 resources workload is reduced
- » Highly scalable solution for occasional surge

### Home Insurance Quote Generation for P&C Insurance Agency

Generate comparative home insurance quote between the Insurers like Progressive and Erie for the prospect customers as soon the quote request is received from Loan Manager or Business Partners.

- » Average Quote generation time reduced by 82% (45 min. to 8 min.)
- » Facility to extract Premium, Coverage, Discounts and downloading quote from 2 insurance companies at a time with comparison
- » 100% accurate Data extraction from Title Order PDF
- » Process standardization to maintain applicant wise documentation



Assurance from AutomationEdge as SaaS vendor and direct involvement in projects has significantly increased customers' automation success rate and improved ROI realization.

### 250+ Global Organizations Trust Us


### Awards & Recognitions



**Niche Player**

Magic Quadrant for RPA 2019

**Executive Zone**

Intelligent Automation Platform 2024

**Major Contender**

From insight to action.  
Robotic Process Automation (RPA) Products Assessment 2024.

**High Performer**  
FALL  
2024  
Fall 2024