Top Indian Wealth Management Firm Achieves Agility & Better Customer Experience Through Automation

01 About Customer
The client, a leading Indian wealth management firm, has a presence in 7 countries and 23 locations in India. It provides wealth management services to HNI and Ultra HNI clients.

02 Business Challenges
The firm faced many challenges in terms of:

- Poor speed, accuracy and agility of its operations
- Adherence to compliance
- Inferior customer experience

Therefore, the firm decided to go for enterprise automation in critical areas such as BOD & EOD reporting, MF Closures, Crisil Index reporting, and many more.
The RPA solution delivered great value across the business functions that include:

- Business operations/process compliance with regulations/standards
- Significant improvement in efficiency
- Cost savings for manual and repetitive tasks
- Boost in employee productivity for more focus on key business activities

AG Technologies provided automation solution that covered conceptualization, design, and development of automated BOTs on Automation Anywhere.

The ongoing engagement scope covers two phases. Phase 1 (6 months) is complete and covered:

- Leading the design thinking workshops to identify required business capabilities
- Preparing enterprise architecture & technical design

Phase 2 (12 months) is ongoing and will cover:

- Defining & grooming detailed User Stories for the capabilities in scope
- Building & integrating Automation Anywhere Bots for capabilities across all functions

The RPA solution delivered great value across the business functions that include:

- Business operations/process compliance with regulations/standards
- Significant improvement in efficiency
- Cost savings for manual and repetitive tasks
- Boost in employee productivity for more focus on key business activities

AG Technologies provided automation solution that covered conceptualization, design, and development of automated BOTs on Automation Anywhere.

The ongoing engagement scope covers two phases. Phase 1 (6 months) is complete and covered:

- Leading the design thinking workshops to identify required business capabilities
- Preparing enterprise architecture & technical design

Phase 2 (12 months) is ongoing and will cover:

- Defining & grooming detailed User Stories for the capabilities in scope
- Building & integrating Automation Anywhere Bots for capabilities across all functions

For more information, contact sales@ag-technologies.com