



Discovery and Automation using RPA

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.

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Solution Provided

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

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Benefits

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

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