

CASE STUDY SNAPSHOT

Leading Broker-Dealer Osaic Transforms Business Through Intelligent Automation

The logo for Osaic, featuring the word "osaic" in a dark teal, lowercase, serif font.

Company Profile

Osaic is a leading broker-dealer serving 11,000 financial professionals with \$500B assets under administration.

Challenge

Osaic needed to enhance its client service and experience to retain advisors. Its processes were in need of optimization and modernization.

Why Automation Anywhere?

When selecting an automation product, Osaic sought a partner that aligned with its values and goals and enabled the acceleration of Intelligent Automation. One of its sister firms was using Automation Anywhere and gave glowing reviews of how it had been able to leverage the platform successfully. Knowing all of that, it was a straightforward decision to engage with Automation Anywhere.

Outcome

Osaic automated back-office processes with an end-to-end mindset but tackled each use case iteratively. In 15 months, the company automated 59 processes, reduced cycle times by 15-25%, and reduced contact center inquiries.

186%

ROI achieved
in first year

93%

accuracy with
Document Automation
for onboarding

88K

client transactions
automated annually

66%

of cases closed at least
one day early

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