

Using Automation Co-Pilot to wow customers and win more business

>99%

reduction in service level standard time

80%

complex calculations automated

60%

customer inquiries automated

Customer Profile

A \$500B diversified financial services firm with 50,000-plus employees offering retail and business banking, financing, wealth management,

Challenge

Loan customers have many options, so speedy replies matter. However, inefficient processes slowed the 40-person underwriting team. Instead of engaging with leads, disconnected systems and manual tasks extended response times.

Solution

The firm used Automation Co-Pilot to create generative AI-powered automations that guide customers in critical data capture and automate behind-the-scenes tasks for complex, cross-application processes. By modernizing outdated methods, security and privacy controls remained robust and workers gained critical deal details and more time to engage with customers.

Now, with over 260 processes automated, teams are not just more productive; automation has enabled a more engaging customer experience that drives real business results.

Outcome

Valuable customers now get near-instant engagement, and teams have more time and information to build relationships and close business because of processes guided by Automation Co-Pilot. By automating 60% of responses and 80% of complex calculations, the firm reduced response times by 67% and reduced service level standard (SLS) times by over 99%, contributing to dramatically higher deal win rates.



Silos are the roadblocks we need to eliminate. We must automate work, streamline cross-application workflows, and empower our people to be more efficient.

Strategy & Planning Manager
Large US financial services firm



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