



Blue Prism RPA for Financial Services

The Challenge: Balancing Priorities

How can financial services organizations transform customer experience, compete against new market entrants, and manage risk & compliance?

The Solution: Robotic Process Automation

At its core, Robotic Process Automation (RPA) software encompasses “software robots” that are specifically programmed to execute a task or a series of tasks by mimicking a human’s actions and executing those actions almost instantly.

Because these “Digital Workers” follow programmed rules, they can help organizations automatically improve process quality, efficiency, consistency, accuracy, and compliance.

Just as importantly, **RPA allow organizations to do more with less**, freeing up employees’ time to focus on tasks that require uniquely human qualities — such as emotional intelligence, reasoning, judgment, and direct customer interaction.

Why Blue Prism RPA?

Blue Prism founded RPA, emerging as the industry leader and a trusted, secure intelligent automation choice for the Fortune 500 and public sector.

We offer a secure, scalable and easy-to-use Digital Workforce that uses six Intelligent Automation Skills (see graphic) to augment human talent, increases productivity, improves customer experiences, and offers a foundation for a true intelligent automation strategy.

Blue Prism’s **connected-RPA** — supported by our **Digital Exchange** — connects legacy systems, API integrations, and the best in artificial intelligence and machine learning technology



KNOWLEDGE & INSIGHT
The ability to harvest, understand & deliver insights from disparate data sources



VISUAL PERCEPTION
The ability to read, understand & contextualize visual information



LEARNING
The ability to adapt to evolving process patterns & derive contextual meaning



PLANNING & SEQUENCING
The ability to optimize workloads & discover opportunities for better outcomes



PROBLEM SOLVING
The ability to solve logic, business, and system problems autonomously



COLLABORATION
The ability to work seamlessly with both people & systems

to give organizations a complete platform for more intelligent automation — and people the freedom to focus on more meaningful work.

How We Help: Financial Services

With a deep background in the financial services industry and a customer roster that includes more than half of the world’s largest banks, Blue Prism’s Digital Workforce can automate many of the processes that are holding back financial organizations with large and complex legacy IT estates.

We understand that balancing priorities is a struggle for many financial services organizations — from **meeting strict compliance regulations** and **optimizing & managing data** to **increasing efficiencies**, all while trying to **deliver the best customer experience**.

This is where Blue Prism RPA can help — from creating more efficient workstreams for manual data entry and automating repetitive tasks such as back office processing to helping align multiple legacy systems and incorporating the best in artificial intelligence to speed verification processes.

Irrefutable Audit Trails, Compliance-Ready

Financial services organizations operate under strict regulations that carry severe penalties in the case of severe breaches. For example, if an organization's audit trail lacks strength and integrity, or if a software platform has inadequate security measures, both compliance officers and IT staff within a financial services organization can be held liable.

How we help: Just as with a human workforce, we understand that a Digital Workforce also requires security, oversight and governance and have built in strict controls regarding how our Digital Workers are configured, as well as how changes are managed and approved.

With world-class security, comprehensive audit trails and nonrepudiation, Blue Prism has been designed to meet the strict security and compliance needs of the financial services industry.

Better Data Management Across Disparate Systems

Blue Prism offers a flexible, proven solution that is easy to use and works with virtually any application across heterogeneous environments.

How we help: With easy-to-use drag and drop functionality, Blue Prism can help financial services organizations automate any application regardless of its platform or how it is presented. Configuration is code-free, logical and highly visual.

Processes are designed to be created, maintained and managed by business users — in conjunction with IT, while reusable processes mean that organizations can assign the same process to different aspects of the business — no coding required.

Increased Efficiencies for Better Customer Experiences

Blue Prism RPA helps financial services organizations deliver exceptional customer experiences. With easy access to the best in AI and cognitive technologies, operational leaders have the tools at their fingertips to better know and respond to customer needs.

How we help: Blue Prism digital workers can process loan applications and insurance claims much faster and through customers' preferred digital channels that speak to the ways they want to communicate. Customers get 24/7 access to applications and real-time answers to their financial questions.

Organizations can also reduce departmental operational costs and drive employees to focus on high-value work, versus repetitive tasks — leading to increased job satisfaction.

How we help: These are just a few examples of the successes our customers have realized:

- 100% accuracy in account closures across multiple systems with an 88% improvement in processing time
- Process time drop: Hours to one minute; improved customer service
- 200 accounts per hour closed automatically versus 12 manually
- Time spent calculating numbers reduced by 90% so compliance staff can spend more time on value-added analysis

Find out more about Blue Prism for Financial Services:

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