



1

Process Automation

- Manual, repetitive, rules-based processes
- Enables transaction automation, dynamic data manipulation and streamlined communication



2

Shared Services Process Automation

- Processes with multiple interactions with different systems
- Opportunity for synergies across processes
- Reduce costs across the spectrum of processes



3

Outsourcing Process Automation

- Efficiencies can be built in outsourcing contracts via use of RPA solutions
- Managed-robots-as-a-service showing rapid growth

Opportunity Area Examples

- Front Office – sales order management, competitor price monitoring, customer engagement automation
- Middle Office – trend tracking, report generation
- Back Office – data reconciliation, app integration
- Accounts Payable (AP), Record to Report (R2R), Business Account Audit Requests

- HR functions – payroll, onboarding, benefits management, education and training, recruitment process
- IT functions – infrastructure / application monitoring, folder and file management, user / directory and release management
- Finance processes - Personal Account Closures, Insurance Claims Processing, Mortgage Processing

- Reconciliations, claims validation, returns management, inventory processing, desktop support, production support, network monitoring