

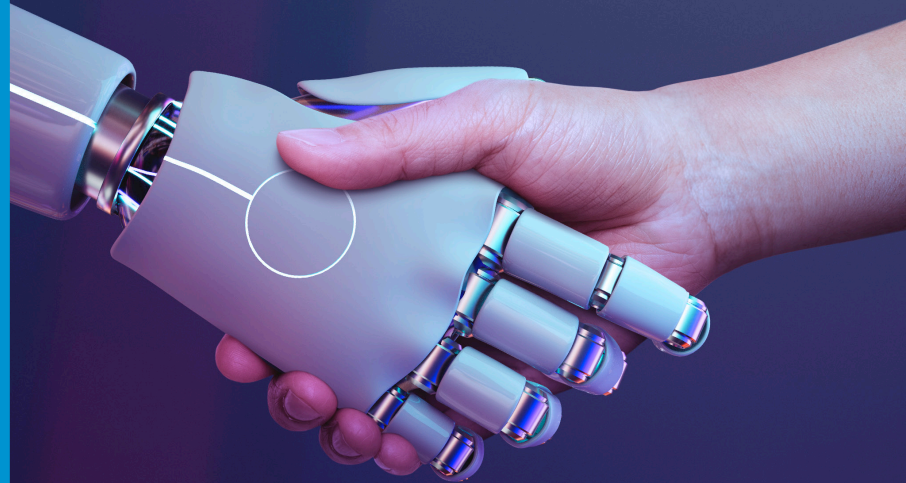
AUTOMATING THE MANUAL HANDLING OF COMMUNICATIONS IN AN INSURANCE AND CREDIT ORGANIZATION

Automation has been enabling organizations to move from manual and repetitive actions error-prone to automated processes that bring more efficiency and satisfaction to organizations.



Business Unit:
DevOps & Automation

Solution:
Robotic Process Automation



THE CHALLENGE

Our client, an insurance and credit organization, needed to automate the manual treatment of communications to reduce the process complexity using UiPath technology.

The process was handled through Excel, involving several steps and people in a time-consuming and error-prone manner.

GOALS

With the automation project, our client was seeking to:

- › Reduce complexity in its current process;
- › Reduce bureaucratic, time-consuming tasks that can be automated;
- › To guarantee an accurate registration of communications;
- › Seamless IT transformation and short-time implementation.

SOLUTION

The RPA accesses our client's software through a remote machine, schedules, and obtains the processed data:

- › The RPA creates a single report file with identical formatting as the output file;
- › With the data gathered, the RPA process the communications according to the business rules logic;
- › The data from each case processed is registered in the report, and, if successfully treated, the data is inserted into the output Excel file;
- › If there is an exception in the process, like verifying the policy holder's demand for personalized processing, the RPA records the need for manual handling of this communication;
- › In the end, the execution report is emailed to the manager.



THE RESULT

As a result, our client counts on an automatic process that works daily, for five hours, and is processed an average of seven communications per workday:

- › Time-saving of 75% due to the change from a manual process that would take 8 minutes to an automated process that now takes only 2 minutes;
- › An end-to-end process with little human interaction, systematic, standard, and repetitive, following consistent rules;
- › Less bureaucratic manual talks for the several managers involved, improving their levels of productivity and satisfaction;
- › Overall satisfaction, from employees to clients for the decrease in errors.



Noesis is an international tech consulting company offering services and solutions to support clients in their business and digital transformation. Noesis solutions focus on infrastructures, software, quality, and people. The organization is based on highly specialized talents, operating in nine business units and six countries: Portugal, Spain, the Netherlands, Brazil, Ireland, and The USA. Since 2020, Noesis has joined Altia, listed on The Alternative Equity Market, with over 2000 employees, 3 Datacenters, and 20 offices.



Robotic process automation (RPA) is a software technology that makes it easy to build, deploy, and manage software robots that emulate humans' actions interacting with digital systems and software. For the third year in a row, in 2021, Gartner recognized UiPath as a leader in the magic quadrant in the RPA area.