

DIGITAL PROCESS AUTOMATION

CIRCLEONE CASE STUDY



Manual Processes

In a leading Fintech company

The organization was heavily invested in resources doing redundant tasks. The challenges faced due to manual processes :

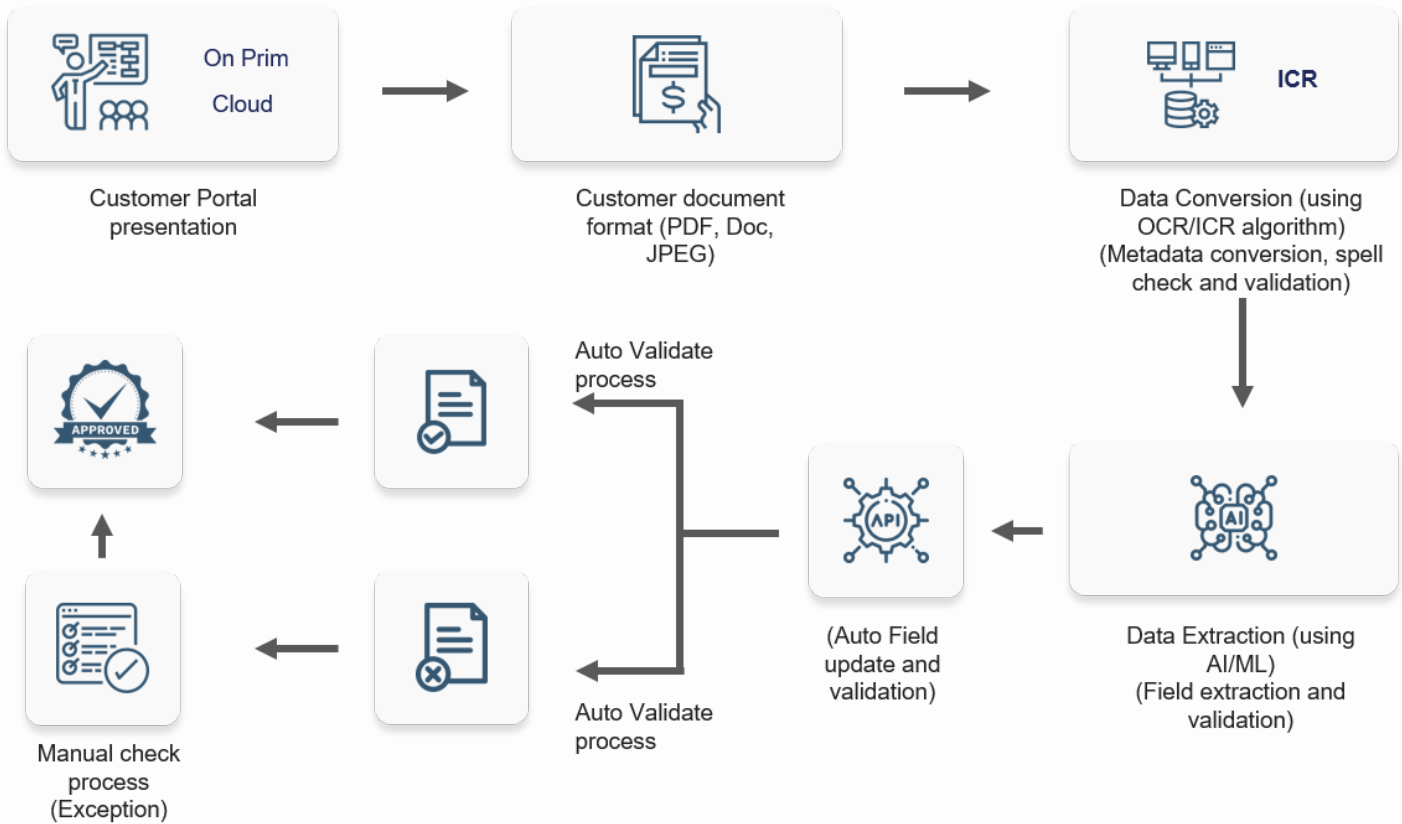
- Resources doing low value jobs like data entry.
- Lack of scalability
- Errors and rework
- Transfer of data between multiple applications.

The company was looking to invest in technology solution to make the process more scalable and efficient.

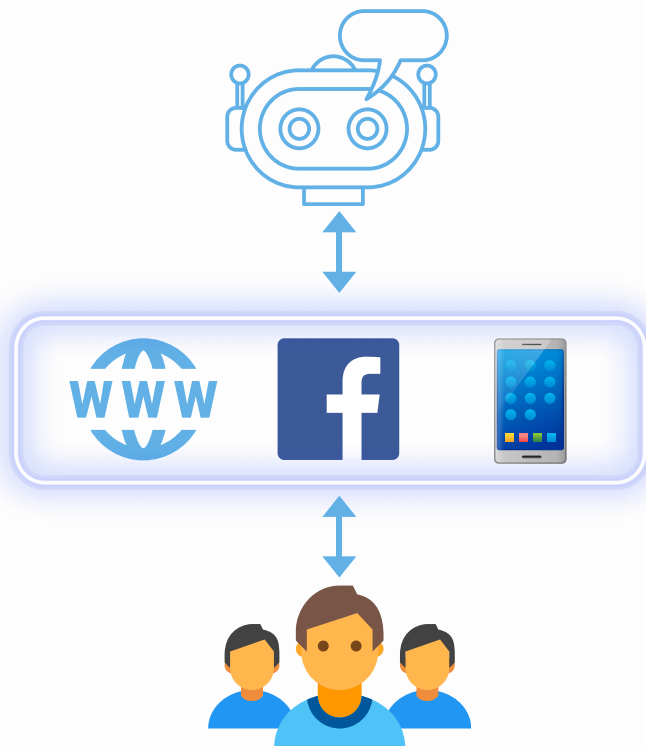
Automation Opportunities

- Customer Onboarding
 - Customer Support
-

Client Onboarding



Client interaction and onboarding across channels

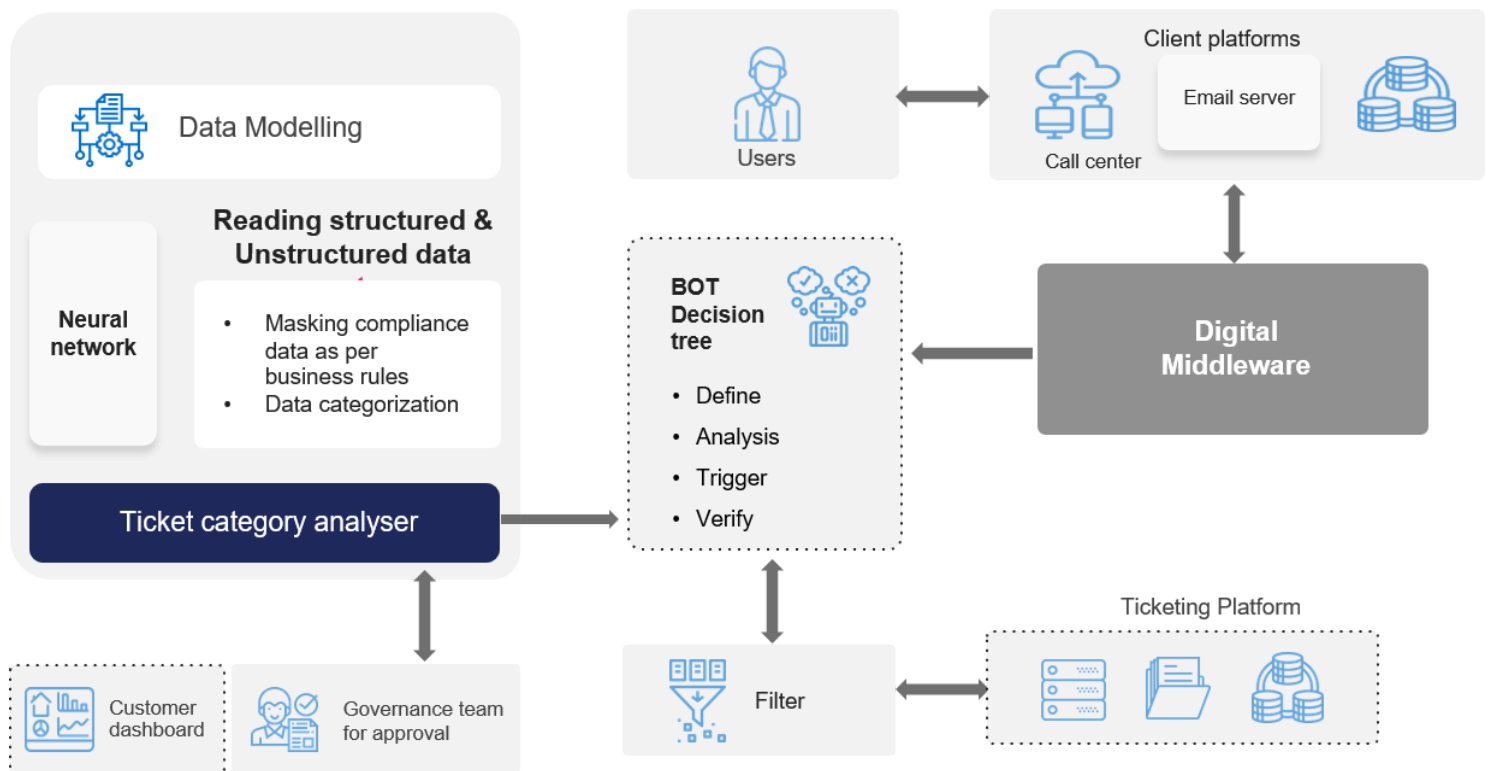


Given the regulatory norms, the customer onboarding process involves document collection and validation.

As a part of the solution the bot was implemented across the website, facebook & their mobile app. Any visitor could interact with the bot on the preferred channel. The bot would respond to the queries and close the deal with an option to submit the documents online.

CircleOne bot extracts the client information from the documents and is integrated to validate the same.

Customer Support



The customers would typically reach out to the contact center agents for every query / request.

Automation Impact

- Agent effort reduced upto 80%
- Reduction in manual ticket volume by 40%
- Improved agent productivity

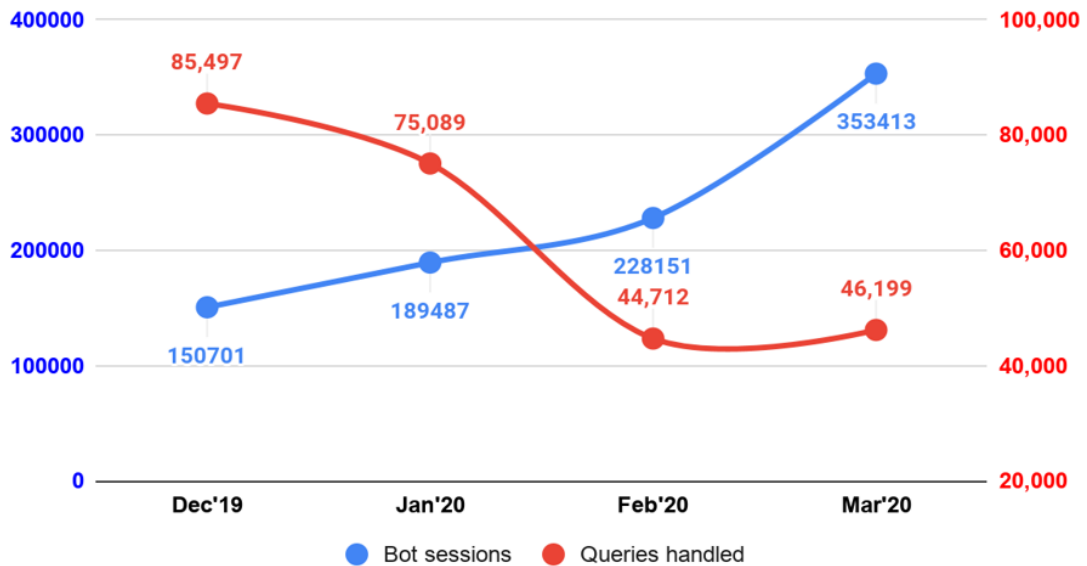
As a part of the solution the bot was implemented to assist both the agent as well as the customer. The agent facing bot would recommend the most accurate response or solution based on the historical data or knowledge repository available.

The customer facing bot in the app would prompt the customer with the possible solutions to a query or raise a ticket incase of any exception.

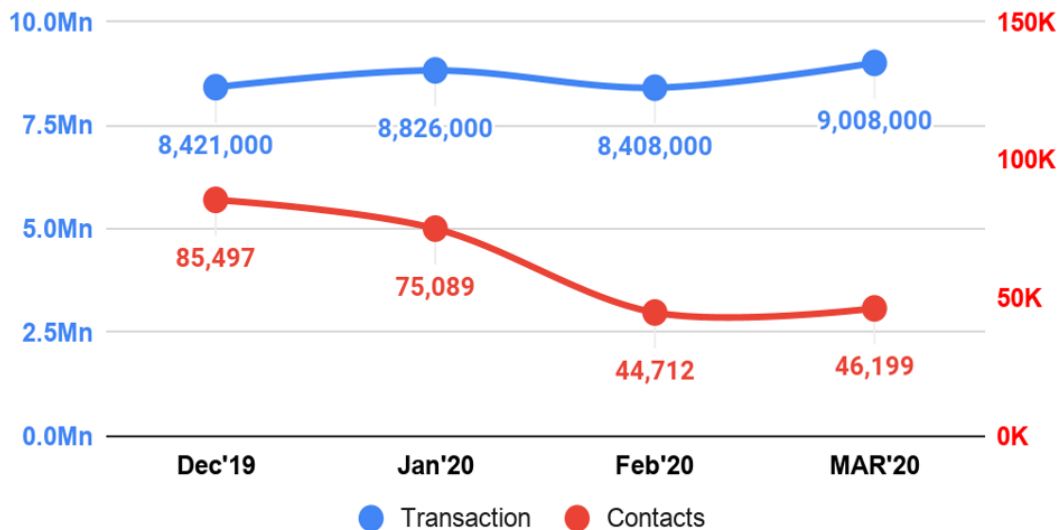
The solution resulted in a drop in the contact center volume.

Business Update

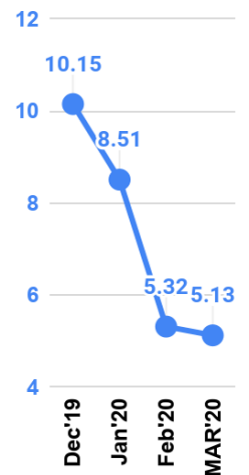
Bot Visit to Complaint Ratio



Monthly Transactions vs Contacts Trend



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