

Optimizing Client Data and Reporting for a Financial Institution

Key Challenges



- Manual and time-consuming data collection processes
- Fragmented credential management slowing execution
- Data delays impacting reporting timelines
- Limited tracking tools preventing real-time progress monitoring

Business Solution



- > Deployed RPA to automate data collection, reducing effort by 20%
- > Introduced a centralized password management tool for efficiency
- > Developed logic-driven quality checks, cutting manual effort by 40%
- > Implemented an automated reporting suite, standardizing client reporting

Business Impact



30%

effort savings through automated reporting

Higher reporting accuracy with reduced manual intervention

Improved operational efficiency and data accessibility



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