

A hand is shown in the foreground, pointing towards a futuristic digital interface. The interface consists of several glowing blue panels, each displaying different types of data visualizations: a network graph, a world map with various charts, a globe with circular progress indicators, and a complex network of nodes and lines with binary code. The background is a dark blue gradient with faint, glowing geometric patterns.

**A TECHNOLOGY-DRIVEN FINANCIAL INFRASTRUCTURE COMPANY IMPROVED  
EFFICIENCY, ACCURACY AND ENABLED LONG-TERM SAVINGS WITH RPA**

**CASE STUDY**

## A CASE STUDY ON ROBOTIC PROCESS AUTOMATION & INTELLIGENT OCR



A technology-driven financial infrastructure and services provider to mutual funds and other financial institutions for over two decades in India reduced 75% efforts (equivalent to 100 FTEs) by automating file processing, email processing, application processing, customer onboarding, reconciliation, and other business processes with an end-to-end automation solution.

## PROBLEM STATEMENT

The client has been an integral part of the Indian financial infrastructure for over 25 years as a regulated entity and built a significant reputation as a Transfer Agency to the Asset Management Industry of India. The company also partnered as a technology-enabled service partner to Private Life Insurance, Private Equity Funds, Banks, and Non-Banking Finance Companies.

Being the oldest mutual fund transfer agency with approximately 70% of the average assets under management, the client had many customer requests in the form of files (CSVs/Excels), emails, and OCR forms that needed to be processed daily. Also, the client's end customer onboarding process happens on their Customer Portfolio Management Platform, which is a SAAS based platform and works across 17 different AMCs (Asset Management Companies).

- Since the entire business processes were carried out manually, it caused multiple errors and was labor-intensive in processing them in a timely manner.

To overcome this challenge, the client aspired to automate the entire process workflow to improve efficiency, accuracy and reduce the cost of these business processes by using the right technology and was on the lookout for a technology partner for end-to-end implementation and support.

## BUSINESS GOALS



Freedom from human scheduling and scaling constraints



Smooth and faster customer onboarding and renewals



Substantially improve compliance, thus saving multiple error costs



Streamline process velocity and turnaround times



Ease of use, maintenance, and highly scalable exit

## SOLUTION



Zuci's team of highly experienced RPA engineers studied and analyzed the existing repetitive, rule-based administrative tasks, such as applications and claims handling processes, customer request workflow, and implemented a robotic process automation and optical character recognition architecture.

With robotic process automation and OCR, the bot logs into the necessary systems, read the inputs from CSVs/Excels, emails, and OCR forms, and performs document imaging, extraction, classification, and data validation to onboard customers on the selected funds.

Further, we established a governance model by providing a walkthrough to the stakeholders after end-to-end installation for change management with communications, training, and Q&A sessions.

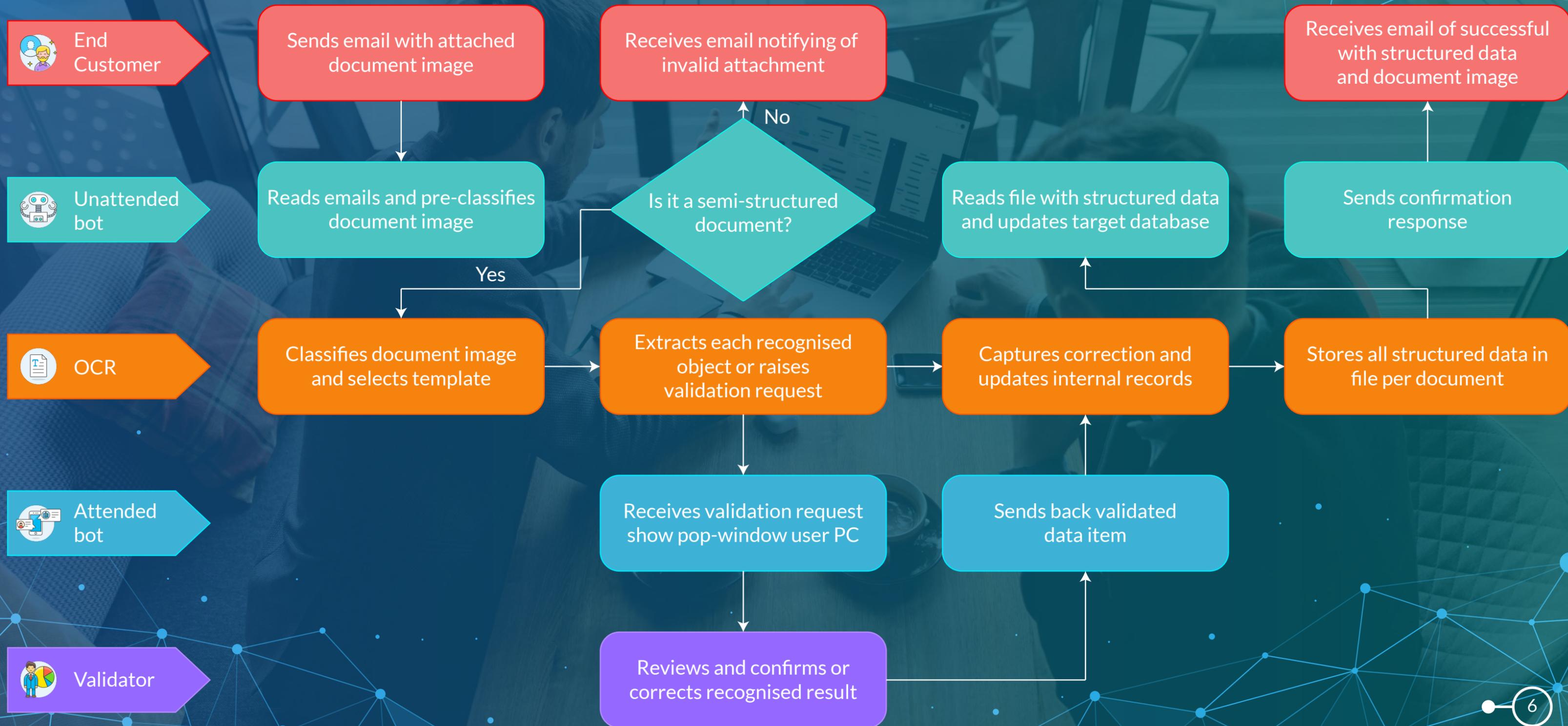
## HOW ZUCI SYSTEMS HELPED?



As a trusted partner with deep experience helping financial services companies to embrace digital technologies, we first understood the end-to-end process workflows.

Zuci's engineers identified error-prone, time-consuming, and mundane tasks in order to build a process automation framework to convert unstructured data sources into retrievable table formats to minimize data entry errors, employee effort, and fatigue. This, in turn helped increase the accuracy and efficiency within three months of implementation.

# HOW ZUCI SYSTEMS HELPED?





**OUTCOME**

**75%**

reduction in effort (equivalent to 100 FTEs)

**90 %**

precision of OCR (nearing accuracy as humans)

**100%**

transaction accuracy

**0**

data entry errors

ROI realized in **8-9 months**

## PROCESSES AUTOMATED



Customer onboarding across 17 AMCs



Approval workflow



Data validation



Exception reporting and metrics



**GET STARTED ON YOUR RPA JOURNEY TODAY!**  
**TALK TO OUR RPA EXPERT AND SEE HOW YOU CAN GET STARTED.**

**Book a Consultation →**



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