

# Case Study



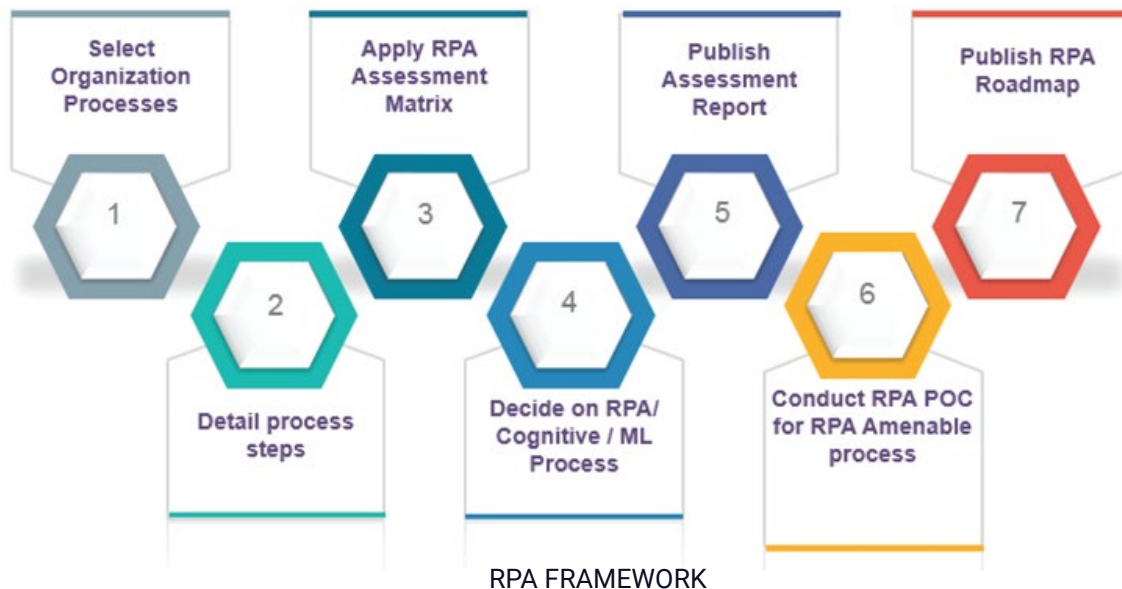
## Automation of CRM processes for a leading life insurance firm

### Problem Statement

One of the leading life insurance companies of India wanted to increase efficiency of its CRM system by automating some of the manual and time intensive tasks. In addition to collecting essential information required to deliver personalized experience to its customers, CRM system was also being used as a customer touch point. The company was not able to extract full value from its CRM system due to presence of steps that required manual intervention. Processing of policy requests received from CRM in its Policy Administration System was one such step. It used to take 15-20 minutes to process each request which was a major bottleneck in the system.

### Solution Provided

NSEIT evaluated all processes linked to CRM using its RPA framework and identified that 11 of them could be automated. Using Automation Anywhere as platform, 10 of these processes were automated and have been running successfully in production. Considering the quick turnaround and immediate benefits from the project, the client decided to increase the scope and is presently looking at possibility of automation in other departments. 10 additional processes have already been identified as phase 2 of the automation project.



### Outcomes

The quick turnaround time delivered by NSEIT ensured immediate ROI of the initiative. Customer decided to continue on its automation journey by extending RPA to more processes in the organization. Few of the benefits are listed below:

- Processing time for each request reduced from 15-20 minutes to 54 seconds
- 30% reduction in resource cost
- Improved customer experience