



CASE STUDY -

**Implementing automation
for one of the largest networks
of independent wealth
management firms in the
United States.**

Client - Overview

One of the largest financial firm in the Americas with more than three decades of service that helps financial professionals provide to their clients' better service, better product offerings, exceptional financial counsel as well as a profitable, effective and satisfying practice.

They are financial industry's thought leaders to combine professional & personal services to enhance a client's financial future by helping them yield, perfect as well as protect their business.

Business Requirement

- ✓ Restructure the process and remove redundant manual tasks that are time consuming.
- ✓ Automate mundane repetitive tasks that grant employees more time to perform additional high value work.
- ✓ Avoid human errors while processing financial documents.
- ✓ Seamless integration of MS Teams with other applications used in the process.
- ✓ Enhance workforce productivity.



Solution

- ✓ Sensiple automated the entire process by leveraging MS Power Automate.
- ✓ Integrated existing MS Teams with other internal applications and systems.
- ✓ Notifications on MS Teams for report approvals and crucial updates.
- ✓ Created scheduled automated workflow between multiple applications and digital services to increase user efficiency.
- ✓ Setup a universal dashboard to track SLA metrics and performance parameters from reports as well as view the reports in various time intervals.

Customer Benefits

- ✓ Automatic updates delivered to the email to reduce the time spent on creating reports.
- ✓ Automated data extraction from financial documents from multiple sources
- ✓ Improved employee productivity.
- ✓ Reduced human errors.
- ✓ Reduced manual effort.
- ✓ Employees gained additional time to perform other crucial official tasks.

- ✓ Reduced time taken to complete a process.
- ✓ Quick approval of reports due to the notifications made available on MS Teams.
- ✓ Supervisors / Managers are able to view the status in real-time.
- ✓ Simplified business processes which are managed more effectively.

Reach us

info@sensiple.com

www.sensiple.com

