RETRIEVAL AND UPLOAD

CASE STUDY - Pulling and Uploading Client Statements to Portals

EXECUTIVE SUMMARY

This case study explores how a wealth management firm automated and simplified their retrieval of client statements from a broker's joint user access website using a scalable bot.

BACKGROUND

The wealth management firm was searching for a simplified and scalabe solution to the retrieval, download, renaming, and filing of hundreds of client statements from a broker's website. This used to be a manual process involving many user inputs in order to view, download, rename, file, and upload the client statements.

CHALLENGES

- Automating the retrieval, download, renaming, and filing of client statements from a broker's website which involved cumbersome and timely user involvement
- Risk for error was too high

SOLUTION

We developed and implemented a bot that fully automated the process, scalable from handling 90 client statements at inception of the bot, to over 540 statements two years later, without additional effort.

OUTCOME

Significant time savings and scalability were demonstrated, with the automation process being reliable and efficient enough to handle a substantial increase in volume over the years. This case demonstrates the scalability and efficiency of RPA in managing repetative tasks over time.

If your organization can benefit from turning processing hours into clicks, set up a free consultation here!