

## A Mutual Fund company improves customer service process using Intelligent Automation

### The Organization

One of the largest Asset Management Companies in India with millions of investor accounts. The client has a nationwide distribution network spread across the length and breadth of the country. Client is a leader in adopting new age technologies to improve customer service quality.

### Challenge

The AMC had high volume of email traffic which needed to be handled with minimal response time and with highest service quality. This entailed many challenges for the customer support team in terms of team management, process management, cost control and handling load fluctuations.

The email traffic was seasonal which meant that additional resources had to be kept in reserve to maintain response times when email volume peaked, e.g. during year end. Managing customer interaction team involved challenges of tackling employee churn, training new employees, handling absentism and nurturing culture of process quality. Additionally, the contact center tasks were monotonous and unexciting, posing a challenge of maintaining employee motivation. Managing process documentation and change management involved incurring cost overheads.

### Solution

The client engaged RSutra to implement software solution for automatically handling customer emails. Getting a software to respond to emails involved challenges because customers do not follow a fixed email text, grammar, writing style or language. RSutra team proposed to implement Intelligent Process Automation (IPA) to take on this challenge. This IPA involved leveraging a leading Robotic Process Automation (RPA) solution along with Natural Language processing (NLP) technology.

A **Software Robot** which understands customer requests on email, **decodes and replies** them with appropriate **message & information**

### Magic Numbers

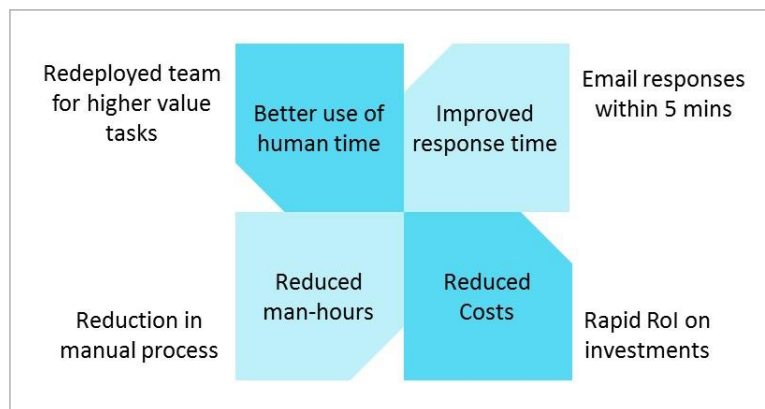
- **1,000s** Man-Hours saved annually
- **Multiple FTEs** reassigned to higher value tasks
- **~100%** response accuracy
- Response to customer emails in under **5 Minutes**
- **25+** different categories of customer requests handled

Our solution involved RPA accessing emails from customer care email server, interpreting and categorizing the emails in Inbox using NLP and sending out responses to the email senders by accessing information from the backend & legacy systems of the AMC.

The solution automated responding to emails in categories like Account Statement request, NAV statement request, Tax statement and Procedure for Redemption. The solution included special features like checking authenticity of the sender, sorting out spam emails, handling repeat requests, managing escalations and generating daily MIS.

## Benefits

Our solution automated the email handling process, eliminating all intensive, high-volume, and error-prone manual tasks. In addition, it was able to cater to increasing customer email volumes and peaks without the need for adding extra workforce. The process quality parameters were easily available for management analysis.



## Results

The AMC automated its customer email handling process for 25+ different categories of customer queries. The AMC developed an ability to run a bot for end-to-end process 24x7, eliminating delays in responding even when the email volumes peaked. Process efficiency improved and customer satisfaction increased considerably. The client geared up to deploy the solution for more categories of emails and extend the benefits to larger set of customers.

## Solution Highlights

- **Intelligent Process Automation (IPA)** based software robot
- **Natural Language Processing (NLP)** to analyse customer emails
- **Robotics Process Automation** to extract data, send emails and traverse through legacy systems
- Solution **eliminated** intensive, high-volume, and error-prone manual tasks
- Solution catered to customer demands at **increasing pace**

## About RSutra Analytics & Consulting

RSutra Analytics & Consulting offers services in Data Science, Artificial Intelligence, Machine Learning, Advanced Analytics, Big Data, Robotic Process Automation (RPA), Geographical Information Systems & Cloud-based technologies

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