

Case Study: Intelligent Automation /Financial Services (Insurance)

# Automating Document Indexing for Enhanced Efficiency

## Business Challenges

A banking client faced significant challenges due to the highly manual and labor-intensive task of indexing documents across multiple departments. This process, often delayed by competing priorities, led to frequent instances where customer requests for specific documents could not be promptly fulfilled in a timely manner, resulting in customer dissatisfaction and friction. The inefficiencies consumed valuable resources and heightened the risk of errors, further exacerbating delays in providing timely and accurate service. Addressing these process inefficiencies is critical to improving customer experience, reducing operational strain, maintaining documentation in one location, and ensuring a more reliable and responsive service.

## What We Did

Primus implemented automation to streamline the indexing process across multiple departments. Primus was responsible for all phases of the full Automation Life Cycle, from governance to process discovery through deployment and ongoing support. The automation enabled our customers to achieve process improvement across the enterprise, which positively impacted operations and improved customer experience.

## Business Benefits

- **Enhanced Customer Service:** Faster document retrieval improves customer response times, leading to higher satisfaction and better service outcomes.
- **Efficiency:** The automation reduces manual indexing time to near zero, dramatically improving operational efficiency.
- **Accuracy:** Automated indexing minimizes errors associated with manual data entry, ensuring compliance with internal regulatory standards.
- **Cost Savings:** Reducing manual labor results in significant cost savings, allowing the team to focus on more strategic activities.

## Technologies Used

The following tools were utilized by Primus in support of our methodology for this project.





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## About Primus

Primus is a trusted technology solutions leader, dedicated to serving its partners for nearly 30 years with exceptional solutions that enhance business efficiency, increase productivity, and boost profitability. Our comprehensive suite of services includes Enterprise Data Solutions, Intelligent Automation Solutions, Cloud Engineering Solutions, and Staffing Solutions, catering to various industry verticals such as Healthcare, Insurance, Telecommunications, Logistics, Food & Beverage, Media, Automotive, Real Estate, Manufacturing, Banking & Finance, and Energy.

## About the Primus Intelligent Automation Practice

At Primus, our IA Practice leverages advanced technologies to empower organizations in their digital transformation efforts. By leveraging cutting-edge tools and solutions, we help businesses streamline operations, enhance process efficiency, drive innovation and deliver measured impact and ROI to the business. Our expertise in Intelligent Automation and hyperautomation ensures that companies can navigate the complexities of digital change, achieving significant improvements in performance and maintaining a competitive edge in today's fast-paced market.

### Our core Intelligent Automation technologies include:

- Robotic Process Automation (RPA)
- Business Process Mapping (BPM) & Task Mining
- Chatbot
- GenAI, Artificial Intelligence, and Machine Learning
- Intelligent Document Processing (IDP) and Optical Character Recognition (OCR)



AICPA  
SOC 2 Type 2 report covering Security, Availability and Privacy



ISO 27001:2013, ISO 9001:2015



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