



R Systems Robotic Process Automation

Banking and Financial Services
Success Stories





Streamlined Mortgage Banking Operations

The challenge

Our client, one of the leading mortgage providers in the United States, manually processed document ordering and data entry and validation. Those operations were human were error-prone and costly to maintain.

The client's employees were spending a lot of time collecting, tracking, and entering loan details into discrete systems. This was causing unnecessary delays and operational expenses.

The need

The client wanted to streamline and automate its routine manual mortgage processes to keep up with ever-changing customer and stakeholder expectations.

The solution

The client decided to implement a scalable solution that would help transform its business. Working closely with R Systems' team of experts, the company developed and deployed a cognitive RPA bot into its existing IT infrastructure & applications. This solution helped our client automate rules-based, repetitive banking processes. The company was then able to spend more time on value-adding projects and accelerate its business. The R Systems bot automated:

- ⦿ The flood certification orders by sending a request for the certificate, extracting data from the certificate (PDF format) and entering the requisite data into the system of record.
- ⦿ The address verification process, by matching each address with the official records & flagging the ones that did not match with the system of record. It also notified the relevant teams of the issue.
- ⦿ The mortgage quality assurance process, by extracting the requisite loan details/documents and sending them directly to the QA team.

Results

60%

INCREASES IN LOAN
PROCESSING CAPACITY

50%

ESTIMATED ANNUAL SAVINGS

100%

OPERATIONS ACCURACY LEVEL

Contact Us Today

Get a free Proof-of-Concept from R Systems experts

Let us help you strategize and implement an effective RPA solution for your organization. Send us your RPA use cases that you need help with - we'll select one and get back to you with a free personalized PoC. Get in touch now:

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