WorkFusion

Banking & Financial Services

Case Study
Automating Complex Email Intake and Data Ingestion for Task Routing

Automation

99%

Almost all manual effort
eliminated

Human Effort

-89%

Reduction in manual
handling time

Customer
Top 10 U.S. bank

Problem
This bank receives over 1 million emails annually from commercial clients. Each message must be categorized into types, and tasks required by each message must be correctly routed in order for client service to begin. The time it took to manually execute this high-volume, highly variable work caused errors and delayed the fulfillment of client requests.

Solution
Using WorkFusion SPA, the bank's operations team configured an optimized workflow that ingests and digitizes each email and their attachments using OCR and RPA. SPA's native AI classifies and either executes requests or routes them to the right person. Each time a bot escalates a more complex task to a person, the workflow gets smarter, more work is automated, and fulfillment times drop even further.

Benefits
The customer exceeded their goal of removing 60% of manual effort, delivering an 89% reduction of effort: The manual effort required to understand the request and validate information went from an average 120 seconds to 32 seconds, and to create a case in the internal system went from 150 seconds to 0 seconds.

Automating Complex Email Intake and Data Ingestion for Task Routing

Before

Person opened and read email and attachments

Person classified email as one of 500 types

Person created internal tracking ticket

Person manually executed service and updated 3-5 internal systems

After

RPA Bot
downloads emails and applies OCR to convert attachments to text

Cognitive Bot
classifies email according to task required

Cognitive Bot
extracts relevant information and executes service

RPA Bot
creates internal tracking ticket and updates internal systems

Results

- **99%** of email classification automated

- **64%** of data extraction automated

- **89%** reduction in overall manual handling time

- **45%** straight-through processing (STP) achieved, with no manual intervention

WorkFusion's AI-driven RPA software creates and manages software robots for knowledge work. Built for data-first companies, its products automate business processes by combining AI, RPA and people in one intuitive platform. Top enterprises choose WorkFusion to reduce their cost of doing business and to use AI to overcome the complexity of scaling operations.

For more information, visit **workfusion.com** or email **learn@workfusion.com**