Real-world agentic AI use cases in financial services

Cutting through the noise with actual client examples

Executive summary

Agentic AI has become one of the most talked-about topics in financial services. From boardrooms to analyst reports, the promise of intelligent agents that can think, act, and collaborate is everywhere. Yet most of the market conversation remains theoretical. Firms are told that agentic AI will revolutionize banking and insurance, but are rarely shown how.

UiPath is different. Our platform combines agents, robots, and human-in-the-loop orchestration to deliver measurable outcomes…not just slideware. Backed by dozens of validated use cases across banking, insurance, payments, IT, and finance operations, UiPath helps organizations cut through the noise and see what's truly possible today.

This paper organizes those use cases into four categories that matter most to financial services leaders: customer experience and growth, operational efficiency, risk and compliance, and employee productivity. Each vignette provides a real-world problem, an agentic automation solution, and the business impact achieved.

1. The market noise vs. the market reality

Agentic AI is everywhere. Banks and insurers are bombarded with visions of "autonomous enterprises" and "digital co-workers." Yet too often, these visions stop at buzzwords.

The reality is that deploying agentic automation in financial services is complex. It requires:

- Agents that can make context-aware decisions.
- Robots that can execute deterministically at scale.
- Human oversight to ensure compliance and trust.
- And above all, orchestration: the ability to connect all of the above into reliable, auditable business workflows.

UiPath is closing the gap between theory and practice.
Our orchestration layer, UiPath Maestro™ enables financial institutions to not just imagine, but to operationalize agentic automation at scale.
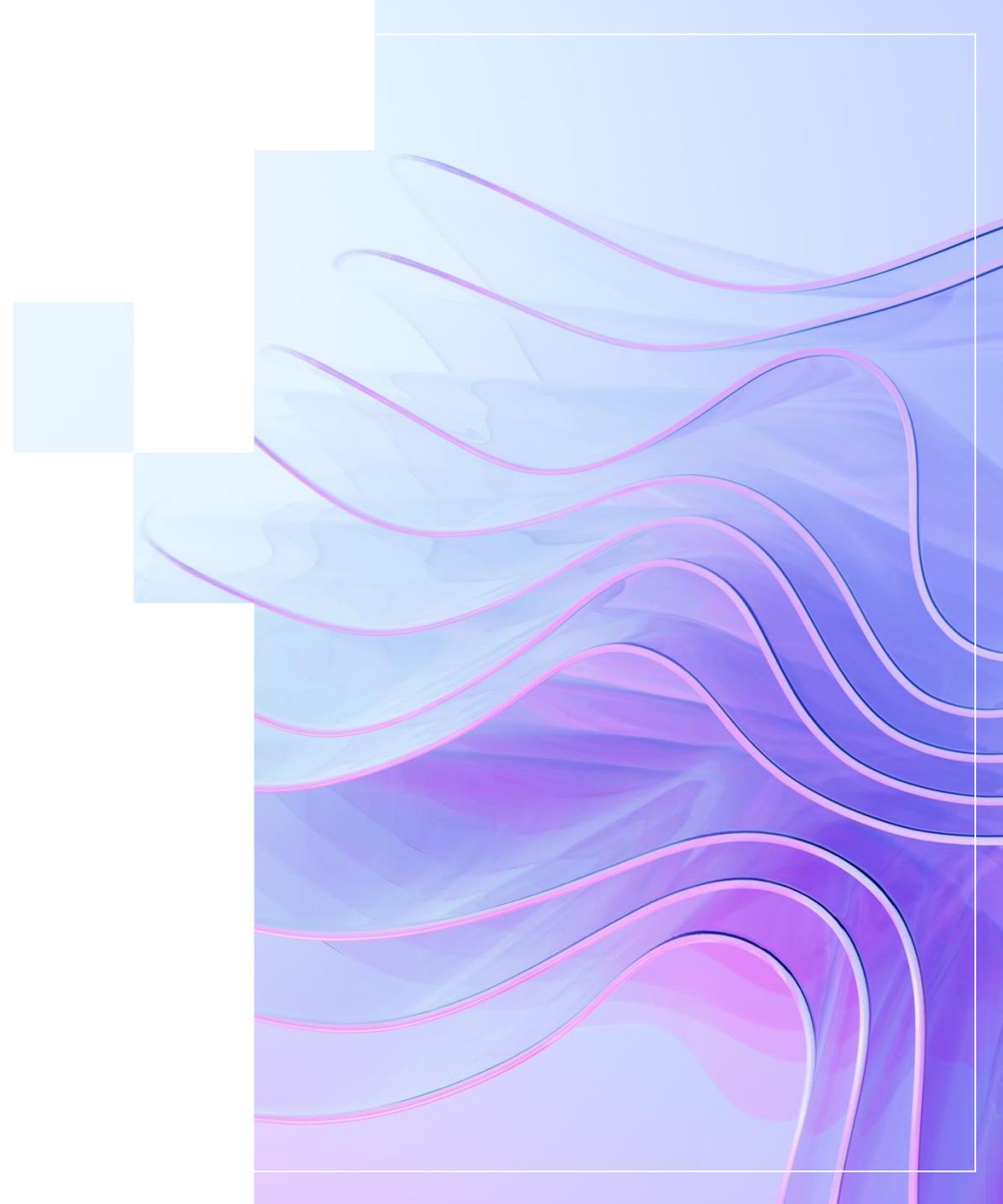
2. The business imperatives driving agentic automation

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Margin compression & efficiency

Banks and insurers are under relentless pressure to do more with less. Manual processes in areas like claims, underwriting, and loan origination consume thousands of hours and create bottlenecks that automation can resolve.

Regulatory complexity

From AML alert handling to DORA compliance, financial services firms face a rising tide of oversight. Manual, fragmented compliance efforts expose organizations to risk. Agentic automation ensures speed **and** auditability.

Customer expectations

Borrowers, policyholders, and investors expect Amazon-level service: instant, personalized, and digital-first. Meeting those expectations requires intelligent systems that can understand context, anticipate needs, and take action.

From talk to proof:
categorized use cases across industry subsegments

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Consumer banking

Banking Taxonomy

Leverage this to understand which horizontal function is correct!

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Consumer Banking / Commercial Banking / Corporate Functions

	Consumer Banking					Commercial Banking				Corporate Functions			
Horizontal Function	Lending (Home, Auto, Personal)	Cards & Payments	Deposits	Contact Center	Risk & Compliance	Commercial Lending	Transaction Banking	Treasury, Payments and Liquidity Solutions	Risk & Compliance	Internal Audit	Business Controls	Finance	Technology
Use Case Area Examples	Loan Origination	Prospecting	Account Opening	Account Maintenance	KYC – CDD/EDD	Loan Origination	Trade Finance	Receivables Management	KYC	Audit Planning	Controls Testing	Record to Report	Vendor Onboarding
	Credit Appraisal	Application Processing	Check Clearing	Dispute Management	Negative News Screening	Credit Appraisal	Supply Chain Finance	Liquidity Management	Negative News Screening	Risk Assessment	Controls Monitoring and Reporting	Management Reporting	Application Dev and Maintenance
	Loan Processing	Settlement	Settlement	Fraud	AML & Sanctions Screening	Loan Processing	Cash Management	Payments and Receivables	AML /Sanctions Screening	Fieldwork	Self Assessment	Treasury	QA
	Loan Servicing	Network Management	Fraud	Lending	Consumer Credit Risk	Loan Servicing	Trade Risk Management	Client Services	Commercial Credit Risk	Audit Reporting		Regulatory Reporting	Third Party Risk Management
	Default Management	Servicing	Accrual & Disbursement	Misc Service	Regulatory Risk Management	Default Management			Regulatory Risk Management	Issues and Action Plan		SOX Compliance	IT Service Management
	Dispute & Fraud Mgmt	Dispute & Fraud Mgmt	Account Closure										

Investment Banking / Wealth & Asset Management

	Investment Banking				Wealth & Asset Management				
Horizontal Functions	Trading Operations	Investment Banking	Sales & Trading	Risk & Compliance	Fund Operations	Portfolio Management	Advisory	Client Services	Risk & Compliance
Use Case Area Examples	Trade Support	Mergers & Acquisitions	Sales	KYC	Middle Office	Research & Analysis	Client Advisory	Contributions & Withdrawals	KYC
	Reconciliation	Equity Capital Markets	Trading	Negative News Screening	Reconciliation	Portfolio Management	Client Advisor Support	Rollovers & Transfers	Negative News Screening
	Clearing & Settlement	Debt Capital Markets	Client Services	AML	Clearing & Settlement	Trading	Client Onboarding	Account Maintenance	AML
	Collateral Management	Research	Security Lending	Market & Counterparty Risk	Collateral Management	Portfolio Risk Management		Brokerage Services	Market & Counterparty Risk
	Corporate Actions		Relationship Management	Regulatory Risk Management	Corporate Actions				Regulatory Risk Management
	Client Onboarding			Pre/Post-Trade Compliance	Fund Accounting				Pre/Post-Trade Compliance

Account Takeover (Fraud)

Vertical: *Consumer banking*
Horizontal: *Fraud*
Persona: *Fraud analyst*
Benefactor: *Fraud department, customer*
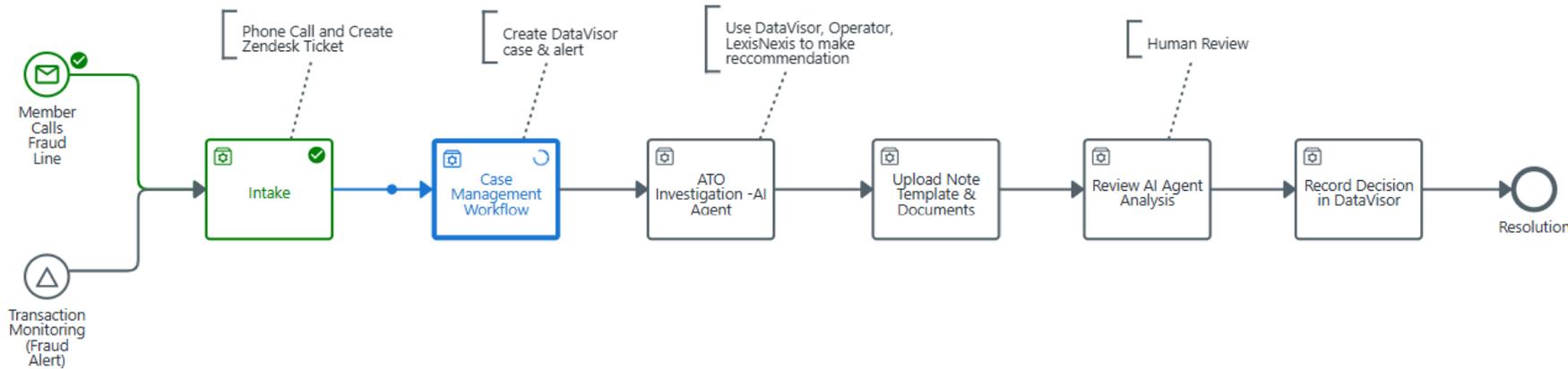**Delivery:** *Not introduced to client*

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Business Problem:
The fraud department struggles with a manual and fragmented account takeover (ATO) investigation process that spans multiple systems (like Zendesk, DataVisor, and LexisNexis). This results in slow response times, inconsistent documentation, and increased risk of mistakes. In a typical case, a member reports an unauthorized transaction, and the analyst discovers that the attacker changed the member's email and password to gain access and initiate fraudulent activity.

Solution:
Many aspects of the process can be automated with RPA (like creating a Zendesk ticket, downloading files from sources used for investigation, and more). AI agents can be used to do a lot of the research that an analyst currently does, like searching internal systems for account activity, and looking up the member in LexisNexis to understand their profile. All of this can be coordinated in UiPath Maestro and, ultimately, provide the analyst with actionable information to make a decision.


Member Calls Fraud Line

Transaction Monitoring (Fraud Alert)

Phone Call and Create Zendesk Ticket

Intake

Create DataVisor case & alert

Case Management Workflow

Use DataVisor, Operator, LexisNexis to make reccommendation

ATO Investigation -AI Agent

Upload Note Template & Documents

Human Review

Review AI Agent Analysis

Record Decision in DataVisor

Resolution

Real-world Scenario: A member calls the fraud line to report login problems, triggering an alert in the banks monitoring system. This initiates a multi-system investigation involving Zendesk, DataVisor, Operator, and LexisNexis to confirm account takeover and take corrective action. If confirmed fraud, they may be issued new account credentials.

Systems Included in Process: Zendesk, LexisNexis, DataVisor

Time to Deploy: Lift for end to end is significant. AI agents will be complex with security considerations.

International Account Opening

Vertical: *Banking*
Horizontal: *Asset management*
Persona: *Operations / Automation*
Benefactor: *Relationship manager*
Delivery: *Partner*

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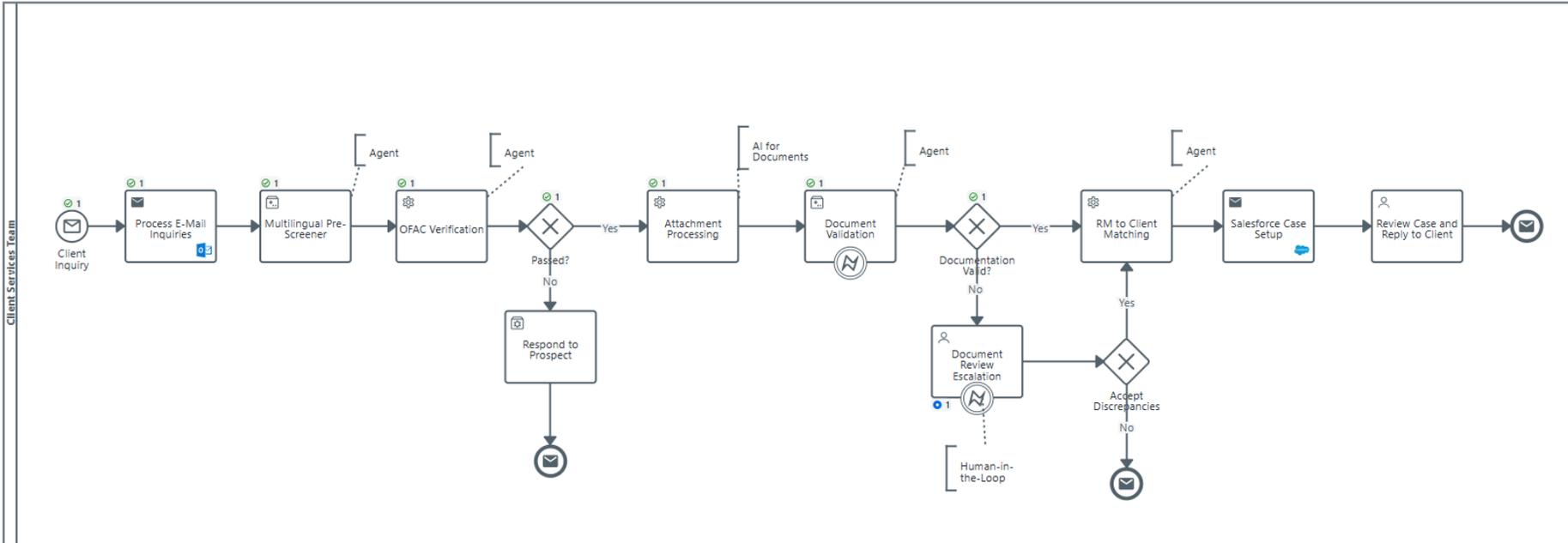
Real-world Scenario: In a future state, a client from Brazil submits documents in Portuguese via email, the system extracts and verifies the info, auto-generates a case in Salesforce, denies the application based on country restriction, and sends a personalized rejection email in Portuguese—all without manual effort.

Business Problem:
Onboarding international clients for asset management is slow, manual, and error-prone due to multilingual communication, varying internal acceptance policies by country, inconsistent documentation formats, and the time-consuming process of creating and managing client records in Salesforce.

Solution:
Much of the process is automated through robots and intelligent agents. Robots handle case creation, updates, and sending email. AI agents identify the prospective client's language, evaluate income, citizenship, and other criteria against internal SOPs, and generate personalized emails in the client's language. If the client qualifies, a relationship manager is automatically assigned based on segmentation. All relevant information is synthesized and delivered to the relationships manager. Maestro oversees and coordinates the entire process. Document extraction is an essential component in delivering accessible data to the agent.

Systems Included in Process:
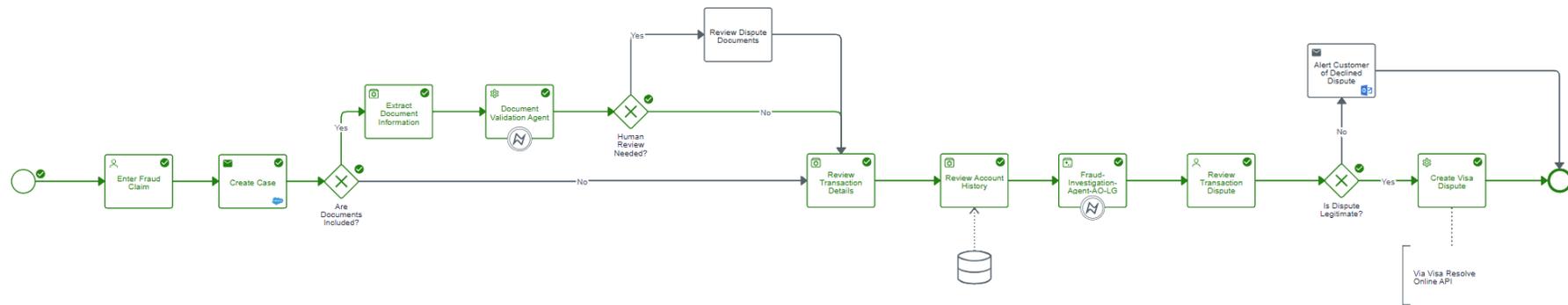Salesforce, internal client systems

Credit Card Disputes

Vertical: Banking
Horizontal: Consumer and Community Banking
Persona: CSR, Payment Operations Leader
Benefactor: Consumer, Head of Payments/Card Operations, COO, Chief Risk Officer, CFO

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Business Problem:
- Dispute Submission: Customer reports a charge; manual intake slows response and risks missing key details.
- Review & Categorization: Agent classifies dispute; human judgment may mislabel fraud or errors.
- Evidence Request: Bank contacts merchant; manual steps cause delays and input mistakes.
- Evaluation: Staff reviews data and receipts; slow, inconsistent analysis risks oversight.
- Decision: Outcome determined; manual processes lead to uneven or delayed resolutions.
- Notification: Customer is informed; manual outreach can be slow and poorly documented.

Solution:
- Robot receives information from fraud submission.
- IDP extracts information from attached documents.
- Robot gathers transaction and account info from payment network.
- AI agent analyzes and assesses fraud.
- Human reviews and hands over to a robot to file dispute, if needed.

Systems Included in Process: Customer web portal, CRM, external payment network

Real-world Scenario: A large multi-national bank process millions of fraud disputes on an annual basis. Right now, this done with large offshore teams creating a time consuming and expensive process. The bank wants to agentify the process by auto-detecting fraud.

Consumer Lending: Mortgage Origination

Vertical: *Banking and Financial Services*
Horizontal:
Persona: *Loan Officer, Head of Mortgage Operations*
Benefactor: *Client, EVP of Lending*

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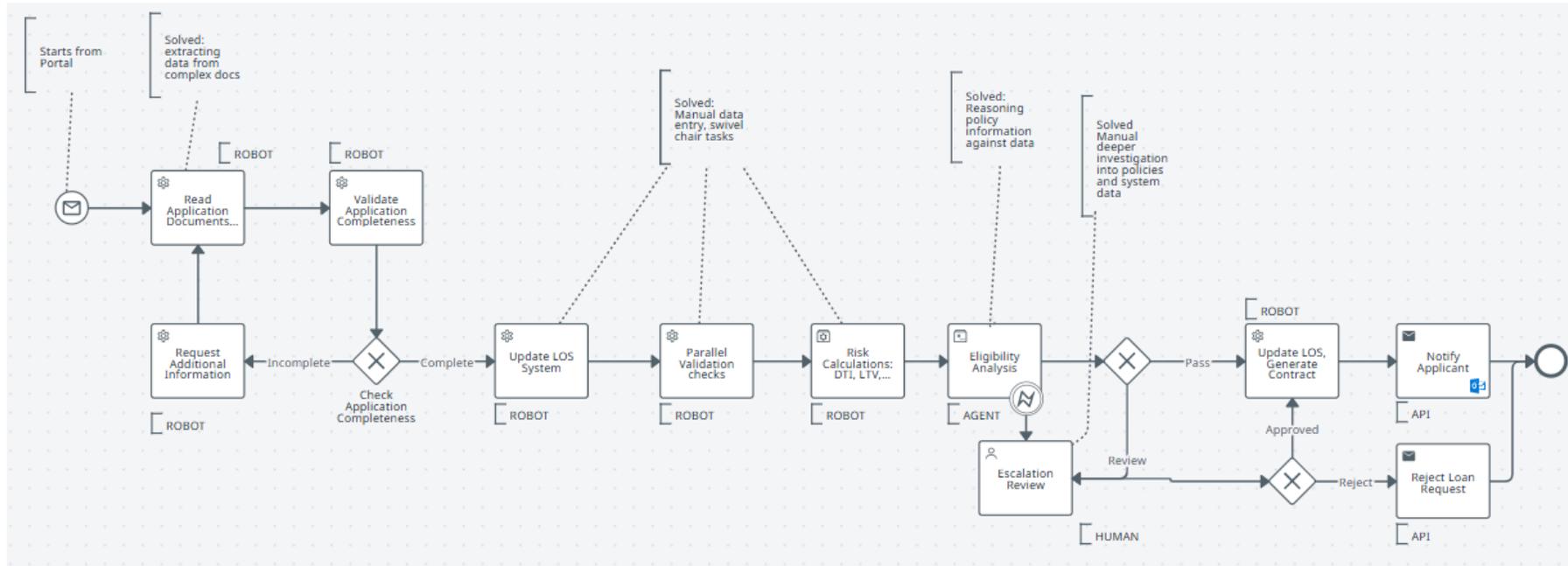
Real-world Scenario: *A borrower applies for loan and is routed through nCino, uploading pay stubs and W-2s via Docusign; the system extracts and validates the data and runs automated credit and fraud checks through Equifax and LexisNexis, and initiates an underwriting workflow in Encompass. If criteria are met, the system generates a conditional approval, triggers appraisal scheduling, and notifies the loan officer for final review.*

Business Problem:
- Mortgage origination is slowed by fragmented intake processes, manual validation, and policy exceptions.
- Ops teams face bottlenecks in document review, debt-to-income (DTI) checks, and LOS updates.
- Leads to delay in approvals, increase error rates, and degrade borrower experience.

Solution:
- UiPath solution orchestrates end-to-end mortgage origination.
- AI agents extract and validate borrower documents, update LOS systems, run DTI/LTV checks, and apply underwriting logic against policies.
- The Eligibility Agent auto-resolves most cases, escalating only exceptions to human review.
- By combining robots for precision execution and agents for adaptive decisioning, lenders achieve faster time-to-yes, regulatory compliance, and enhanced customer experience at scale.

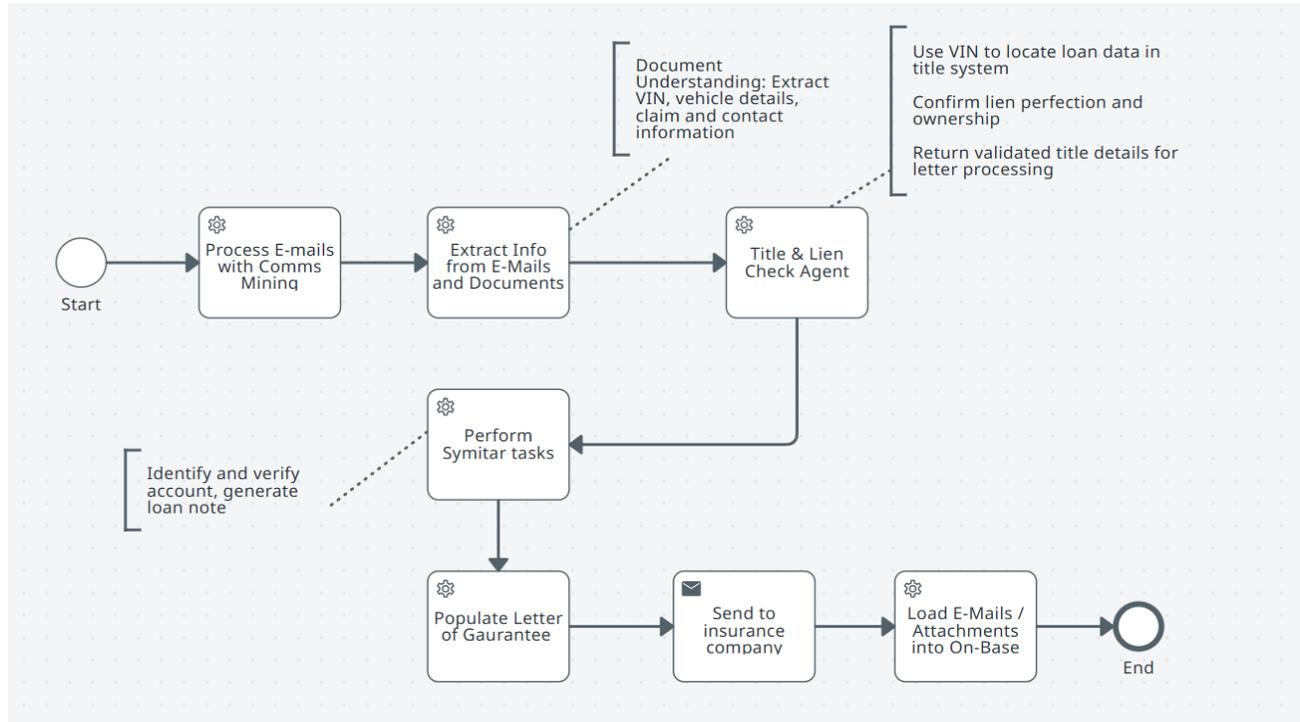**Systems Included in Process:** LOS e.g. Encompass, Empower, Byte Software

Insurance Letter of Guarantee (Consumer Auto Loans)

Vertical: *Banking and Financial Services*
Horizontal: *Credit Operations*
Persona: *Compliance Officer, Loan Officer*
Benefactor: *Insurer, Credit Union, Borrower*

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Process Diagram

Start → Process E-mails with Comms Mining → Extract Info from E-Mails and Documents → Title & Lien Check Agent

Extract Info from E-Mails and Documents:
Document Understanding: Extract VIN, vehicle details, claim and contact information

Title & Lien Check Agent:
- Use VIN to locate loan data in title system
- Confirm lien perfection and ownership
- Return validated title details for letter processing

Perform Symitar tasks

Perform Symitar tasks:
Identify and verify account, generate loan note

Populate Letter of Gaurantee → Send to insurance company → Load E-Mails / Attachments into On-Base → End

Business Problem:
- Delays due to manual effort: staff manually verify claims, go through e-mails, draft Letters of Guarantee, and coordinate via email or phone, which delays LOG generation and payouts.
- Error-prone process: manual data entry leads to mismatched VINs or payoff amounts, triggering lien release denials and rework.

Solution:
- UiPath Document Understanding™ and agent pull claim data, or extract from communications, auto-draft precise LOGs with lien terms.
- UiPath Maestro™ used to orchestrate end-to-end activities: review inbound claims, connect to insurer portals, check title management and core systems, generate LOG.
- Agents validate settlement, release lien.
- Automated cross-checks with loan information, insurer and vehicle documentation, identification of discrepancies before LOG is finalized.

Systems Included in Process: Symitar, title management system

Real-world Scenario: *A credit union member totals their financed vehicle. The insurer assesses the claim and requests a Letter of Guarantee. The credit union promptly issues the LOG, confirming lien release upon settlement. The insurer sends the payout check to the credit union, which applies it to the loan balance. The title is released within days, and any remaining deficiency is addressed. With coverage in place, the member avoids out-of-pocket costs, and the claim resolves smoothly.*

Third-Party Demand

Vertical: *Banking and Financial Services*
Horizontal: *Personal Banking*
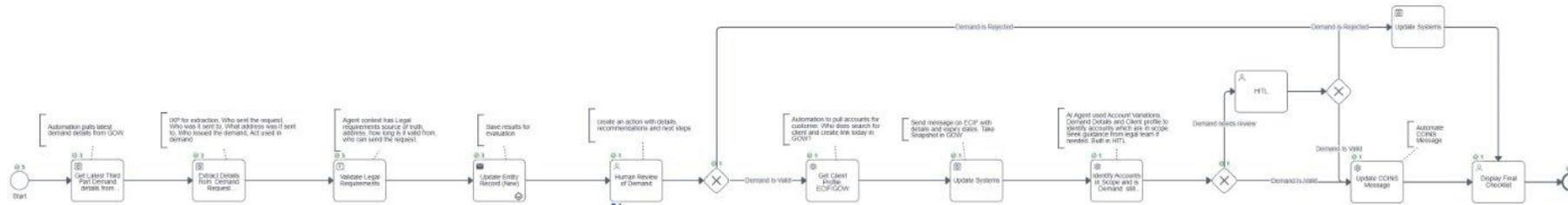**Persona:** *Compliance Officer, Loan Officer*
Benefactor: *Customer*

Real-world Scenario: *This initiative will be improving and streamlining the overall third-party demand process as, in the current state, there is increased potential for error and processing delays. This will include accepting provincial third-party demands regardless of where the demand is served, retail operations (RO) accepting demands that have not been stamped/dated by the banking center, and providing provincial bodies with province-specific fax line to send demands directly to RO without manual intervention.*

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Business Problem:
- Delays due to manual effort
- Compliance and tight SLAs
- Very high volume

Solution:
- UiPath Document Understanding™ and AI agent pull demand details from demand letters.
- UiPath Maestro™ orchestrates end-to-end activities: reviews inbound demand, validates against SOPs, validates customer against and core systems, and updates instructions on internal systems.
- Agents validate demand legality and evaluate impacted accounts based on demand type and SOPs.
- RPA updates the internal system of records.

Systems Included in Process:
Symitar, title management system

Commercial banking

Commercial Banking: Counterparty Credit Risk

Vertical: *Investment/Commercial Banking*
Horizontal: *Risk and Compliance*
Persona: *Risk Manager*
Benefactor: *Risk Committee*
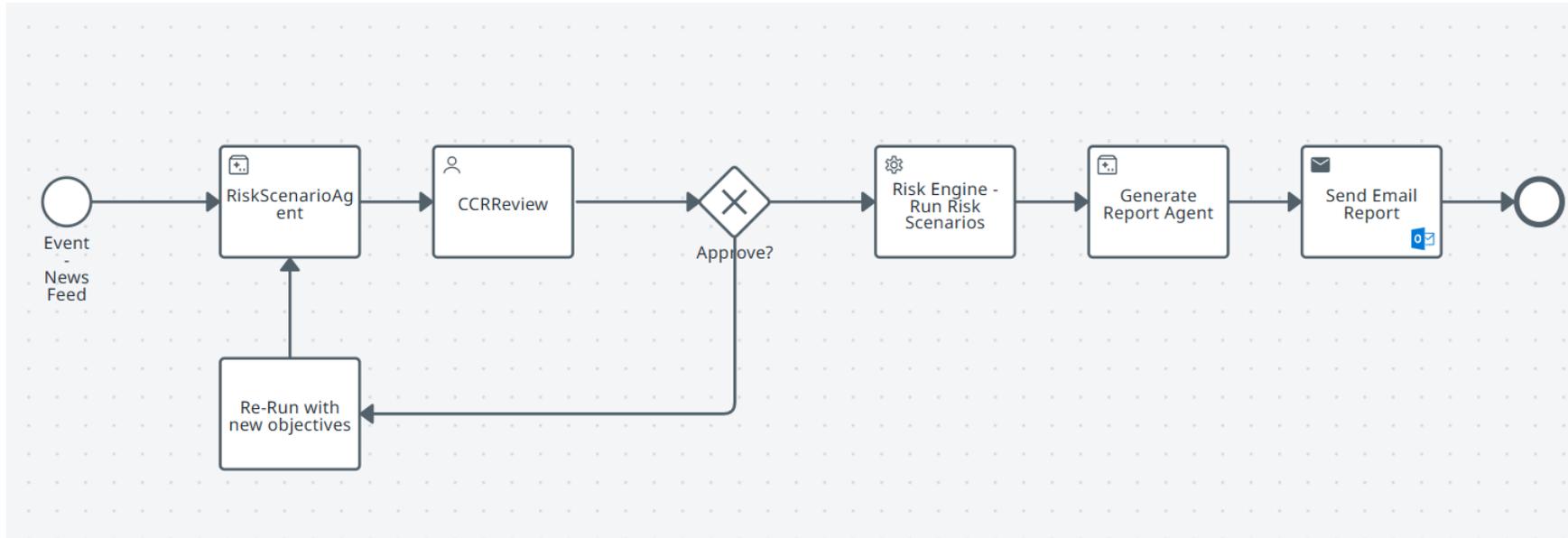**Delivery:** *UiPath Services or Partner*

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Business Problem:
Manual credit risk assessments for clients in high-risk jurisdictions are resource-intensive, inconsistent, and often lack real-time adaptability. Analysts must aggregate disparate data sources, assess qualitative and quantitative factors, and produce defensible documentation for audit and regulatory review—all under compressed timelines. Furthermore, it is very difficult to anticipate second/third-order impacts that may flow directly from the initial/precipitating event.

Solution:
The agentic system is triggered from a news feed with description of a macro event. The risk scenario agent aggregates data from internal systems, performs research to enrich an understanding of the potential impact of the event and recommends stress scenarios to execute. A user can review the recommendations and accept or reinitiate the analysis with new parameters or objectives. Maestro coordinates the agents and automates triggers to external systems to perform the risk engine run around the scenarios. A report generation agent consolidates the findings for the event and emails the report.

Systems Included in Process: Risk engine, spreadsheets

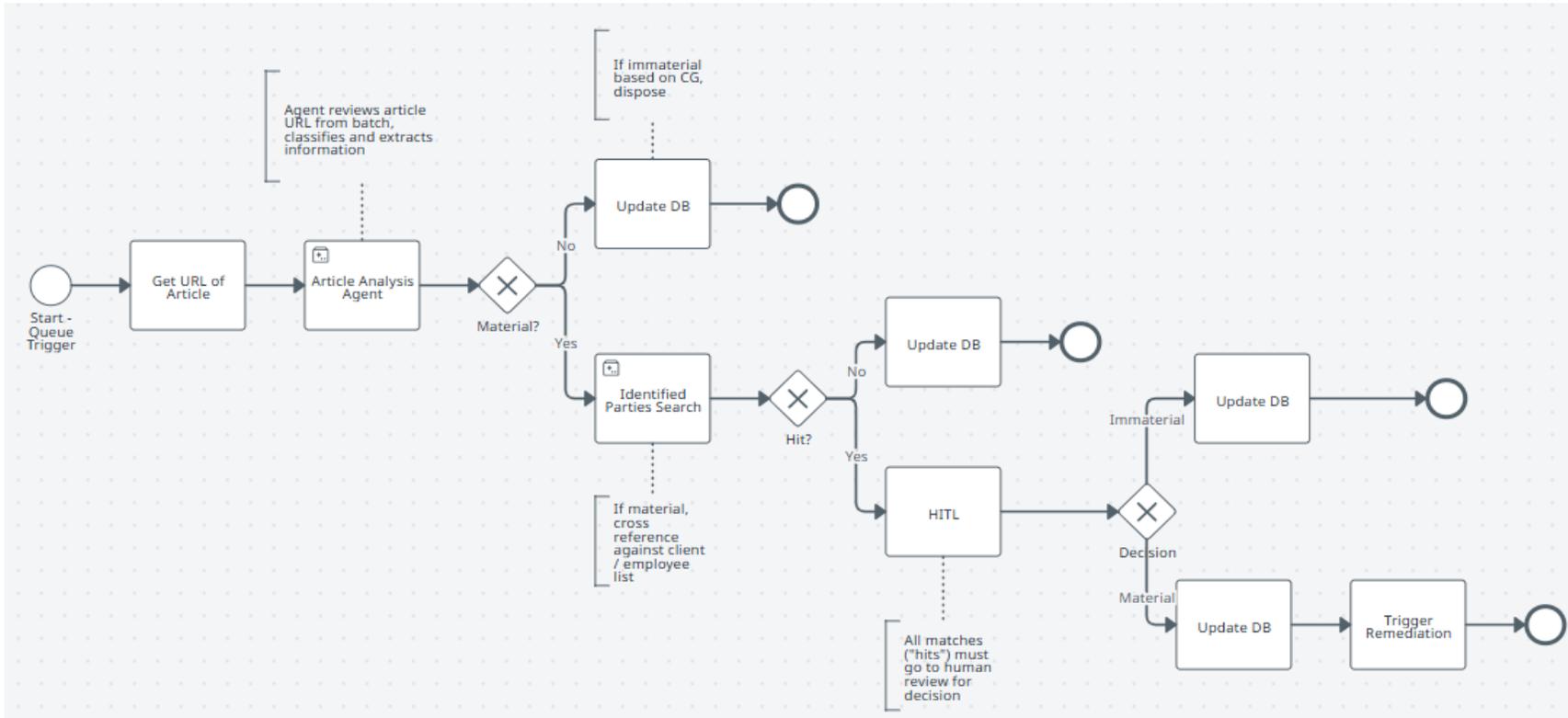# Commercial Banking: Negative News

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Business Problem:
Bank reviews thousands of articles every single day. Employees review the article for adverse themes (i.e. crime or drug-related activities). Involved parties must be identified as it relates to their relationship with the bank. All investigation must be logged for posterity.

Solution:
The bank can utilize an AI agent to "read" each article, determine materiality and extract involved parties. Core automation or AI agents can leverage the output and determine if the involved parties have any relation to the bank. Any confirmed parties can be reviewed by an AML specialist before the request remediation occurs.

Agent reviews article URL from batch, classifies and extracts information

If immaterial based on CG, dispose.

Update DB

Start - Queue Trigger → Get URL of Article → Article Analysis Agent → Material?

No → Update DB

Yes → Identified Parties Search

If material, cross reference against client / employee list

Hit? → No → Update DB

Yes → HITL

All matches ("hits") must go to human review for decision

Decision → Immaterial → Update DB

Material → Update DB → Trigger Remediation

Systems Included in Process: Google News, databases

Real-world Scenario: *During client onboarding, the system automatically scans global news sources through services such as LexisNexis and Refinitiv, uses AI to filter out false positives, cross-references results with the bank's KYC system, and escalates only high-risk findings to a compliance analyst—allowing most clients to be cleared without manual review.*

Commercial Banking: Ultimate Beneficiary Owner (UBO) Matching

Vertical: *Commercial Banking*
Horizontal: *AML*
Persona: *Relationship Manager*
Benefactor: *Head of Corporate Banking, CRO, COO, Chief Compliance Officer*
**Delivery**: *UiPath Services or Partner*

Business Problem:
Every month, Canadian banks must review all high-risk clients and ensure that the client profile data is aligned with the official Corporations Canada registry.

Any discrepancies must be reported within 30 days.

Solution:
Canadian banks can now leverage an orchestrated workflow to cross-reference data between the official government database and internal bank systems.

The bank will use a combination of RPA as well as AI agents, if AI is required for semantic matching.
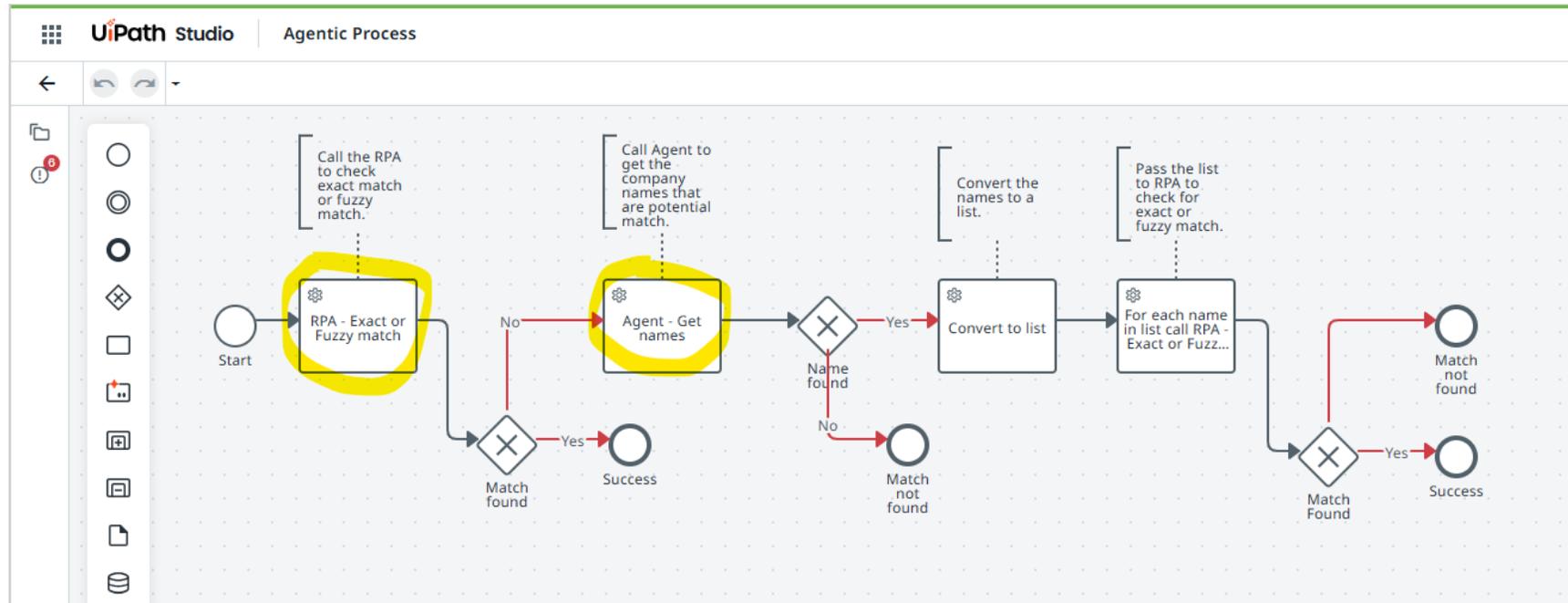
Commercial Lending: Loan QC QA

Vertical: *Banking and Financial Services*
Horizontal:
Persona: *Head of Lending Operations*


Business Problem:
The commercial loan closing and QC process is highly manual, fragmented, and dependent on individual judgment across multiple handoffs. Industry challenges include:
- Disconnected systems/context switching
- Manual verification of 50+ data points
- Manual follow ups

Solution:
- AI agents automatically ingest loan-closing packets, instantly classifying all documents, and organizing them into predefined categories.
- AI agents extract key data points from all documents simultaneously and automatically compares, providing side-by-side digital views highlighting any discrepancies or inconsistencies.
- Agent generates email summaries that clearly categorize issues by severity and type, providing specific details about what was found and exactly what needs remediation.

Systems Included in Process: LOS e.g. nCino, LoanVantage, doc management - LaserPro
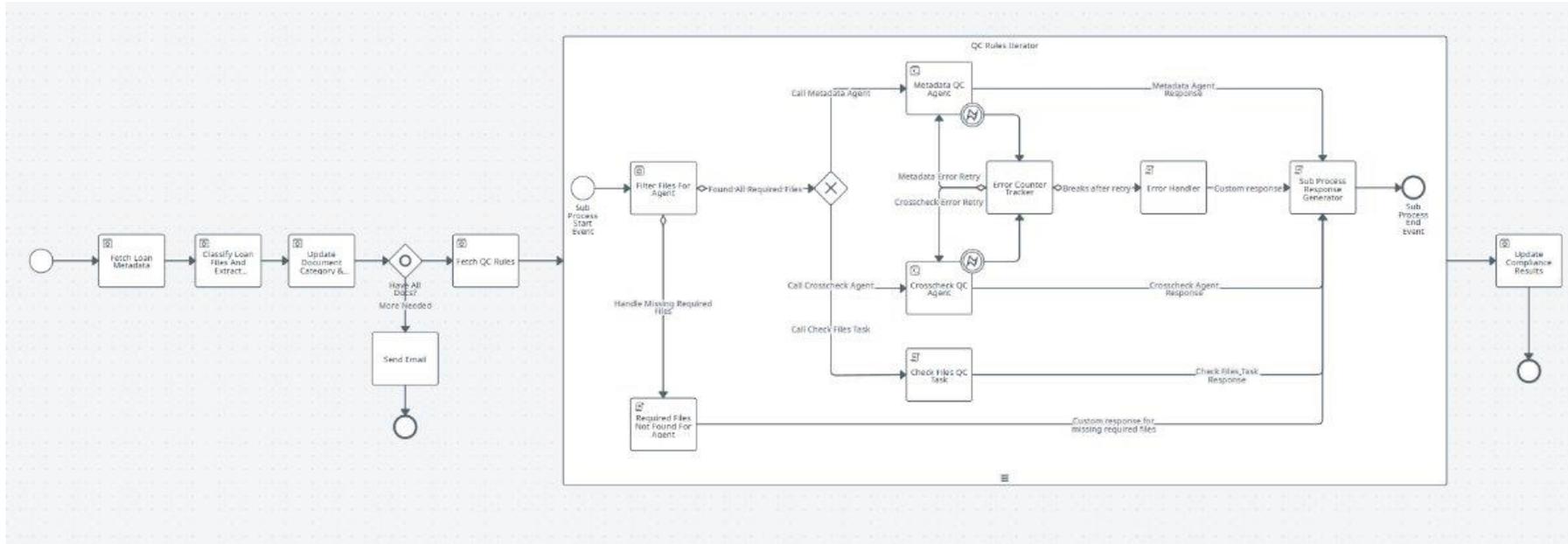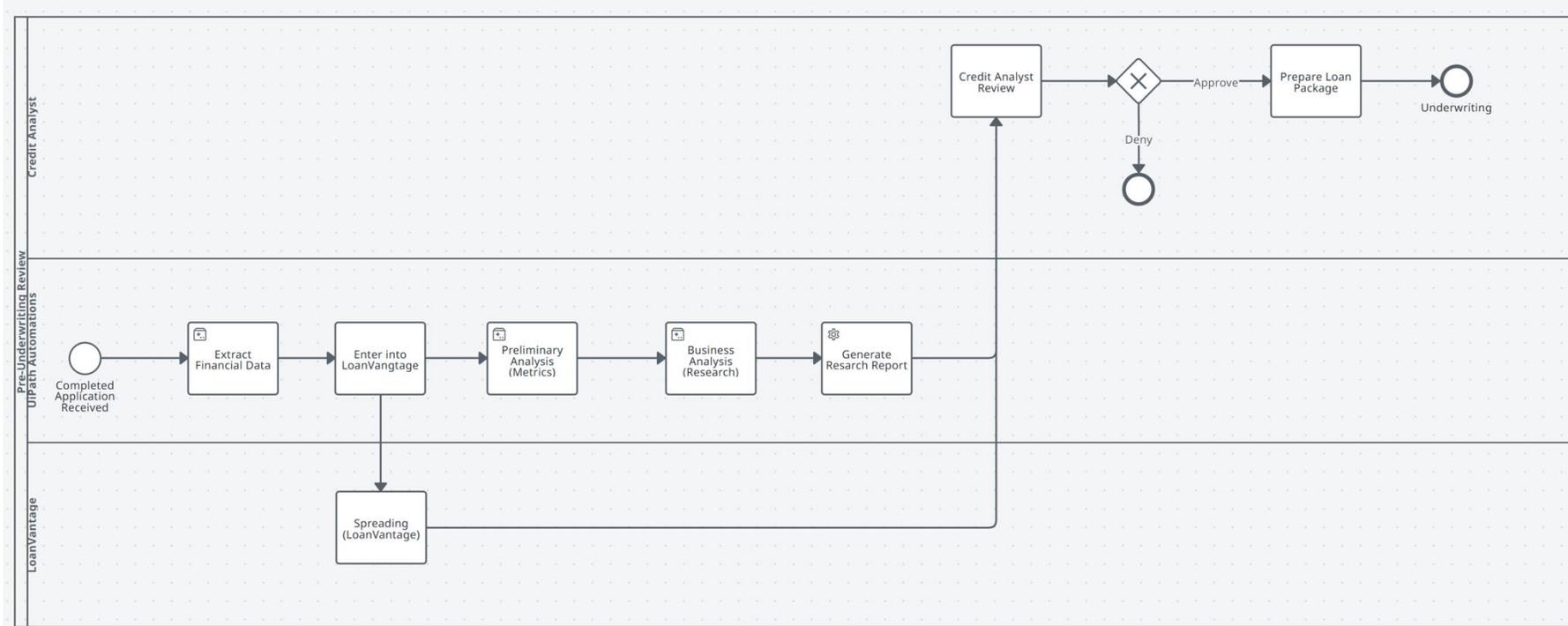
Commercial Lending: Credit Analyst Solution

Vertical: *Banking and Financial Services*
Horizontal: *Commercial Loans*
Persona: *Credit Analyst*
Benefactor: *Lender, borrower, underwriting team*
Services: *Commercial Loans (for various assets)*

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Real-world Scenario: *A construction company applies for a $2M loan with three years of 1120-S tax returns. The credit analyst manually extracts financials and enters them into the LOS. It researches the company, legal issues, and industry background. Pre-underwriting and loan decisioning time is suboptimal.*

Business Problem:
Pre-underwriting for commercial loans involves extracting financials from tax forms (1120, 1120-S, 1065) and entering them into a loan origination system like LoanVantage, which generates standardized financial statements. Manual entry and validation are time-consuming and error-prone.
Research is also conducted as part of the pre-underwriting process. This is time consuming, involving checking several sources to further assess the applicant's creditworthiness and risk.

Solution:
The solution has two components aimed at shortening decision and funding timelines. It supports analysts in pre-underwriting with two tools: (1) document understanding to extract tax form data and enter it into the LOS via API (with custom models for the 1120,1065 and other IRS tax forms), and (2) a research agent to verify business, industry, and legal issues to support due diligence.
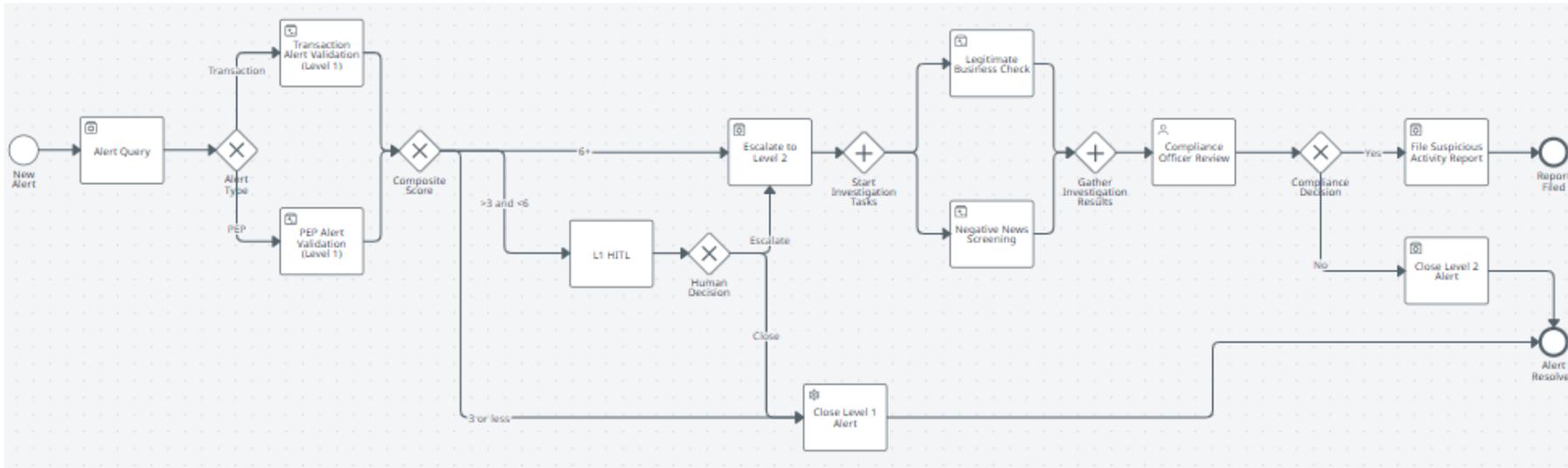
Systems Included in Process: LOS (Jack Henry - LoanVantage), LexisNexis, IBISWorld

Time to Deploy: Dependent on model training

AML – Alert Handling/Review

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Business Problem:
Financial institutions face a critical challenge in anti-money laundering (AML) screening, with 95% of alerts being false positives, leading to inefficient processes and potential compliance risks. This high rate of false positives results in wasted resources, slower customer onboarding, and increased vulnerability to actual money laundering activities.

Solution:
Agentic automation offers a solution by significantly reducing false positives through deploying AI agents to review and screen out false positives for either Transaction or PEP/Sanctions Alerts. By implementing these agents within UiPath Maestro™, they can be orchestrated within an end-to-end alert review process alongside robots to interact with core alerting systems like NICE Actimize, as well as human-in-the-loop apps to sign off on agents' decisions. Overall, enabling financial institutions can improve customer experience, strengthening their compliance standards, and operational efficiency.

Real-world Scenario: *Financial institutions can receive thousands of AML alerts monthly. This bank receives 250k transaction alerts monthly and have a team of 30 FTEs processing them manually. In other cases, banks are only able to review some of their AML alerts, increasing regulatory and reputational risk.*

Systems Included in Process: varies but NICE Actimize (alert generation), and WorkFusion (digital workers/alert review)

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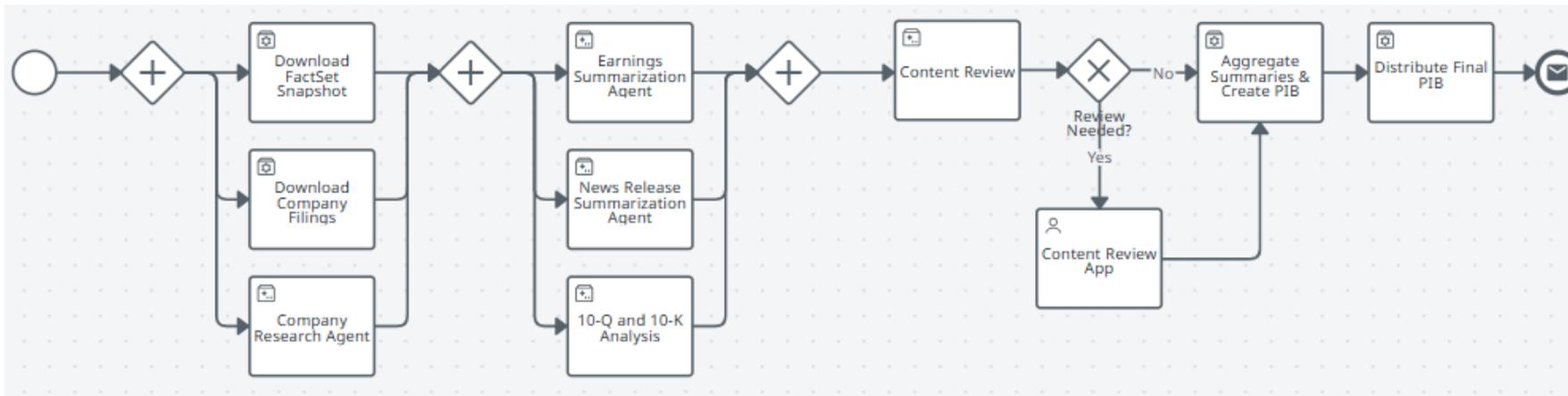# Capital markets and wealth management

Investment Banking/Cap. Markets: Company Research

Vertical: *Banking and Financial Services*
Horizontal: *Research*
Persona: *Investment Bankers/Equity Researchers*
Benefactor: *IB/Research Leads*

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Business Problem:
Investment banking and equity research analysts face time consuming tasks in creating company research documents like public information books (PIBs). Doing so involves manually gathering data from multiple sources, summarizing it, researching companies, and compiling it into a defined format, contributing to long work hours and potential burnout among analysts.

Solution:
The bank deployed UiPath to streamline the creation of PIBs in investment banking by first gathering data from various sources like FactSet, then calling GenAI to summarize that data, and finally aggregating that data into a file output to align with required formatting. Now, with AI agents and UiPath IXP (Intelligent Xtraction & Processing) this process could be further streamlined by introducing agents alongside existing automations, human-in-the-loop interfaces, and summarization activities to perform additional research tasks like performing company web research or analyzing and extracting key details from complex and unstructured documents like 10-K or 10-Qs.

Real-world Scenario: The investment bank received the following benefits by automating v1 of this process with GenAI activities: "By automating PIB creation and summarization, we have significantly lowered the time spent on these tasks by several thousand hours per week. The time to generate AND summarize a single PIB has been reduced from 4-6 hours to around 10 minutes. This translates to an estimated annual savings of 208,000 hours on PIB reports and an additional 52,000 hours on summarization, totaling 260,000 hours when fully adopted." Even greater savings are possible now with agents handling additional research tasks.

Systems Included in Process: core data systems like FactSet, CapIQ, as well as Microsoft Excel, PowerPoint, and Word for outputs.

Fund Accounting Reconciliations

Vertical: *Banking and Financial Services*
Horizontal: *Trading Operations*
Persona: *Trade Ops/Fund Accounting Analysts*
Benefactor: *Accounting/Ops Owners*
Delivery: *Client & Account Team Lead*

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Real-world Scenario: A leading fund administrator sought to address operational inefficiencies and automate their end of day net asset value (NAV) checklist reporting process, which 1,000+ employees currently touch. They initially transformed that process into a partially automated one around their workflow tool, but significant manual analysis around reconciliation breaks remained which can now be handled by agents.

Business Problem:
End-of-day reporting and reconciliation in trading operations involves a series of critical checks and reconciliations to ensure financial data accuracy across systems. This process encompasses verifying position/cash balances, performing control checks, and analyzing reconciliation breaks to maintain compliance and accurate reporting in key systems of record.
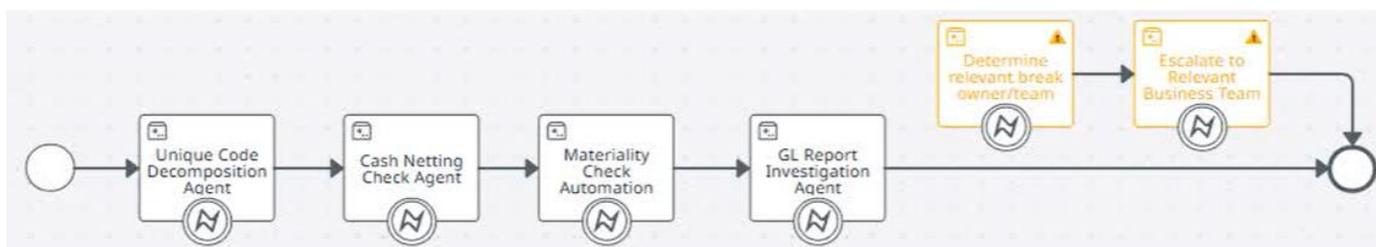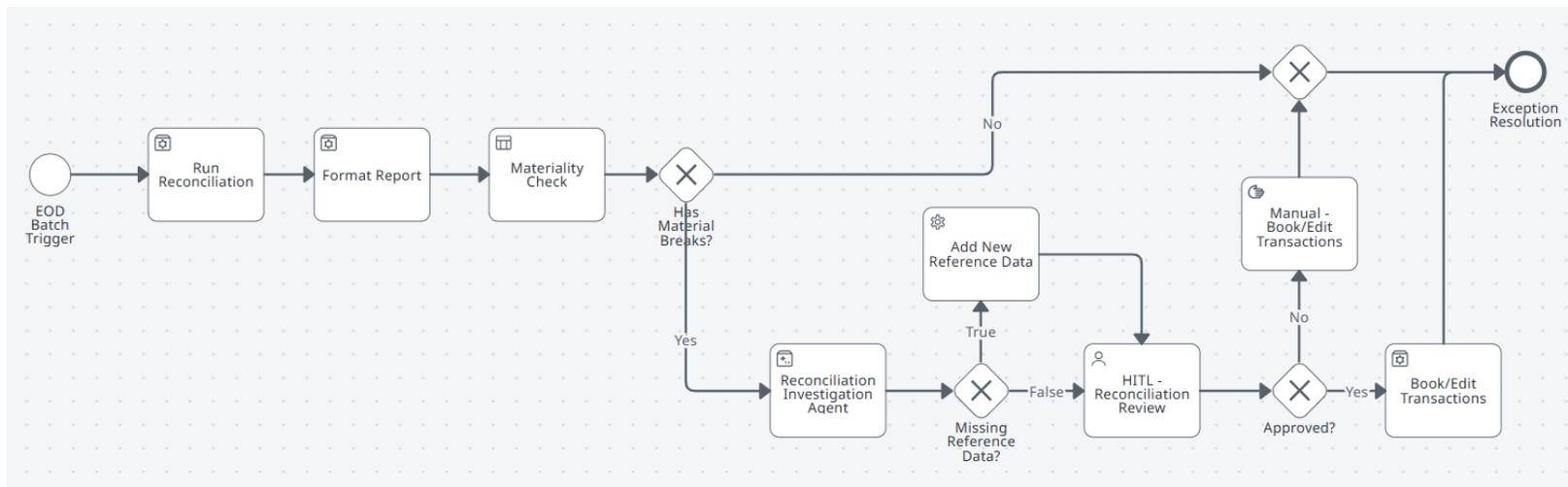
Solution:
The fund administrator is pioneering the use of intelligent agents to handle NAV check exceptions, beginning with cash reconciliation processes. These specialized agents are designed to decompose exception codes, rule out timing issues, assess materiality, and identify specific transactions causing the exceptions. This initiative represents the first step in a broader strategy to deploy similar agents across various reconciliation types, including position, price, trading, and accruals, potentially revolutionizing their entire NAV checks process.

Systems Included in Process: Core trading and workflow systems

Time to Deploy: 2 days (for initial PoC build during an onsite workshop)

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Payments and treasury

Commercial Payments: Onboarding

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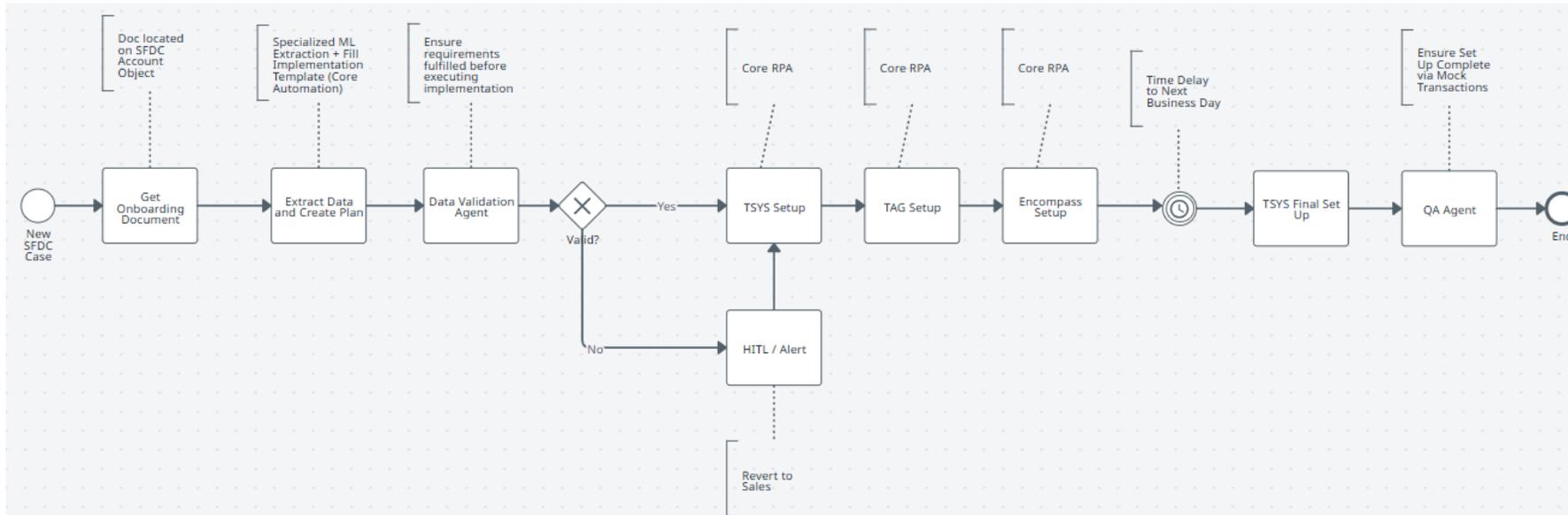
Business Problem:
Post-sale, the firm onboards their corporate payments customers manually. The process starts by extracting data from standard documents, followed by manually setting up the customer in core payment systems. The process is mainly handled via spreadsheets and from memory.

Solution:
While the process is mainly deterministic, orchestration will allow for the firm to provide real time visibility into new client onboarding status as well as automatically handle time-delayed actions.

AI agents will bring a new level of validation and QA to the process while RPA will remain critical for front-end automation needed to set up accounts.

Systems Included in Process:
Salesforce, TAG, TSYS, Encompass

Treasury Operations: Client Servicing

Horizontal:
Vertical: *Treasury Ops*
Persona: *Client Servicing Specialist*
Benefactor: *Corporate Payments*
Delivery: *UiPath Services*
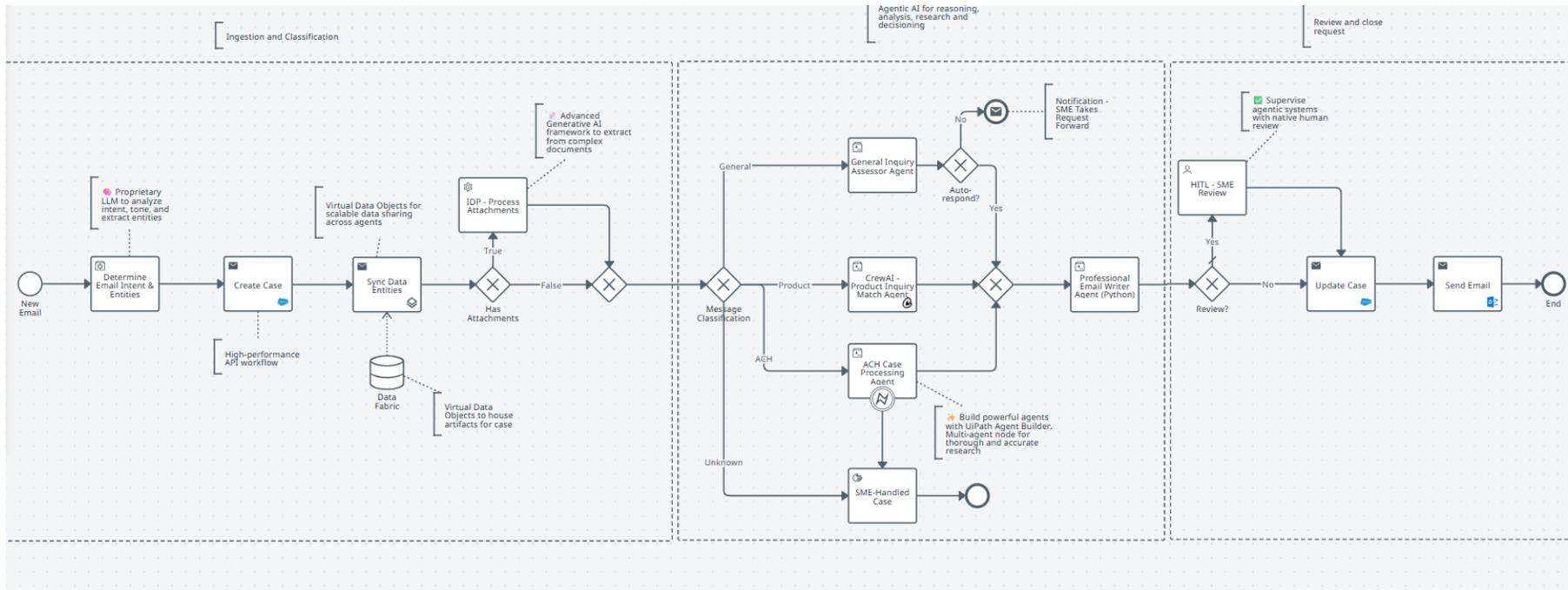
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Business Problem:
Varied requests, manual research, slow responses, angry clients, no way to see the problem and improve.

Solution:
The whole UiPath stack to transform the entire process

Systems Included in Process:
Salesforce, TAG, TSYS, Encompass

Insurance

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Insurance taxonomy

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Property & casualty Insurance (brokerage relevant (B))

|	Sales & distribution (B)	Underwriting	Claims	Policy admin (B)	Billing & payments (B)	FP&A (B)	Enterprise risk management (B)
Functional area (VPs)							
Use case areas/ Examples	Producer onboarding & management	New Business UW	FNOL triage and processing (B)	Policy issuance	Premium collection	F&A	Loss control
	Commissions & compensation	Renewal UW	Fraud detection & flagging	Endorsements	Dispute resolution	Tax	Counterparty risk mgmt.
	Quote ingestion	Data management / enrichment	Claim validation		Refund processing	Record to report	Market risk mgmt.
	Carrier engagement (B)	Risk and ratings assessment	Claims lifecycle management		Payments management	Financial Risk	Regulatory ops & reporting
	Policy binding					Compliance	Reinsurance management
						Regulatory affairs	

Life & benefits Insurance (brokerage relevant (B))

	Sales & distribution (B)	Underwriting	Claims	Policy admin (B)	Billing & payments (B)	FP&A (B)	Investment management	Enterprise risk management (B)
Functional area (VPs)								
Use case areas (Director/ Manager)	Broker onboarding & management	New business UW	FNOL triage and processing (B)	Policy issuance	Premium collection	F&A	Treasury ops	Loss control
	Commissions & compensation	Renewal UW	Benefits claims fraud detection	Endorsements	Dispute resolution	Tax	Asset/portfolio management	Counterparty risk mgmt.
	Quote ingestion	Data management / enrichment	Claim validation	Corp-level servicing	Refund processing	Record to report	Product management	Market risk mgmt.
	Carrier engagement (B)	Risk and ratings assessment	Claims lifecycle management		Payments management	Financial risk	Risk management	Regulatory ops & reporting
	Policy Binding					Compliance	Sales & distro	Reinsurance management
						Regulatory affairs	Trading & settlement	

Claims Intake: FNOL

Vertical: *P&C Insurance*
Horizontal: *Claims Processing*
Persona: *Claims Adjuster*

UiPath
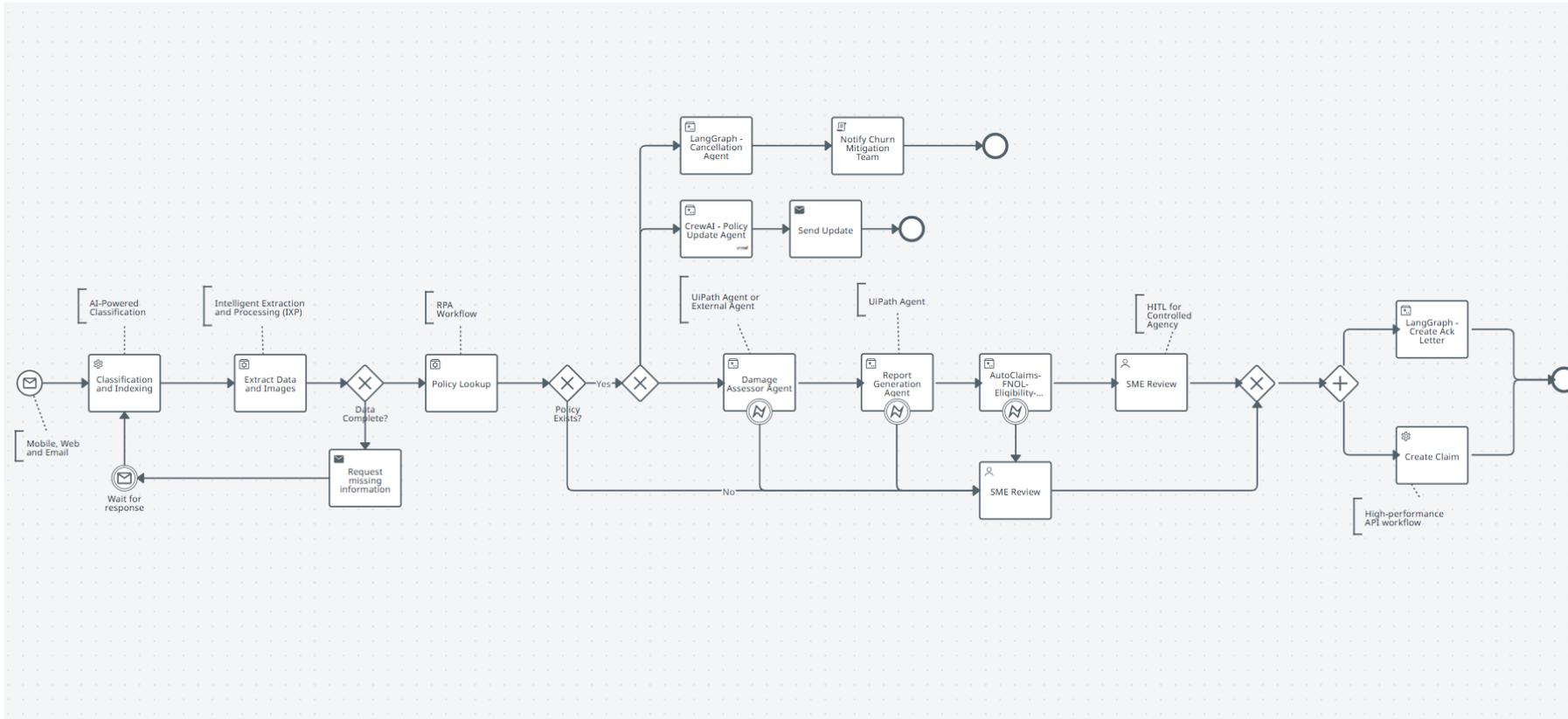
Business Problem:
Unstructured inputs to claims requests are still often processed manually. The manual intake of claims packets creates a ripple effect: increased processing costs, slower settlements, frustrated customers, compliance risks, and lost competitive edge. Addressing it through digital transformation and automation isn't just a process improvement—it's a strategic necessity for P&C insurers looking to stay lean, compliant, and customer-first.

Solution:
A combination of specialized AI services ingests and triages claims packets, while **agent-based analysis** processes images and unstructured text and cross-references policy data. This streamlined system enables end-to-end claims intake with minimal human intervention.

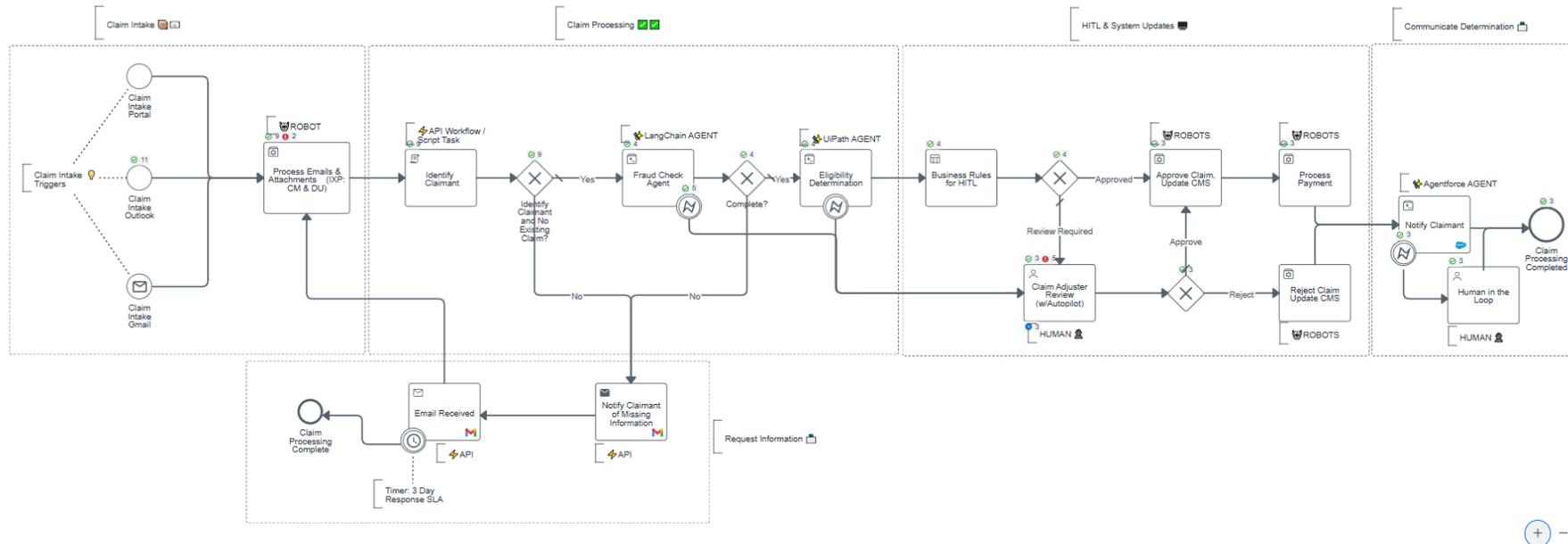**Systems Included in Process:**
Guidewire

HSA Claims

Vertical: *Group Insurance*
Horizontal: *Accident and Health Insurance*
Persona: *Medical Claims Specialist, Benefits Administrator*
Benefactor: *Account Holders, Head of Benefits Operations, COO*

UiPath

Business Problem:
- Claim submission: participant submits a reimbursement request with receipts via app or portal.
- Eligibility check - admin system verifies the expense against IRS-qualified rules.
- Claim review: claim is automatically or manually reviewed and approved, denied, or pended.
- Payment issued: approved claims are reimbursed via direct deposit, check, or card.
- Recordkeeping: transactions are logged for audits, reporting, and participant access.

Solution:
- Robots collect and process HSA claims from various sources automatically.
- IXP extracts and validates data from documents to minimize manual entry.
- AI agents handle exceptions, making decisions using policy rules and participant data for accuracy and compliance.

Systems Included in Process: Case management, workflow management, Benefits Administration

Real-world Scenario: *An employee benefits administrator processes over 5 million HSA claims a year. Before automation/agent this was all done manually. Their goal was to increase the volume of claims they could handle without increasing the size of their team.*

Accident Claims

Vertical: *Group Insurance*
Horizontal: *Accident and Health Insurance*
Persona: *Claims Adjuster*
Benefactor: *Policyholder, Head of Claims, COO*
Delivery: *UiPath Services*

UiPath
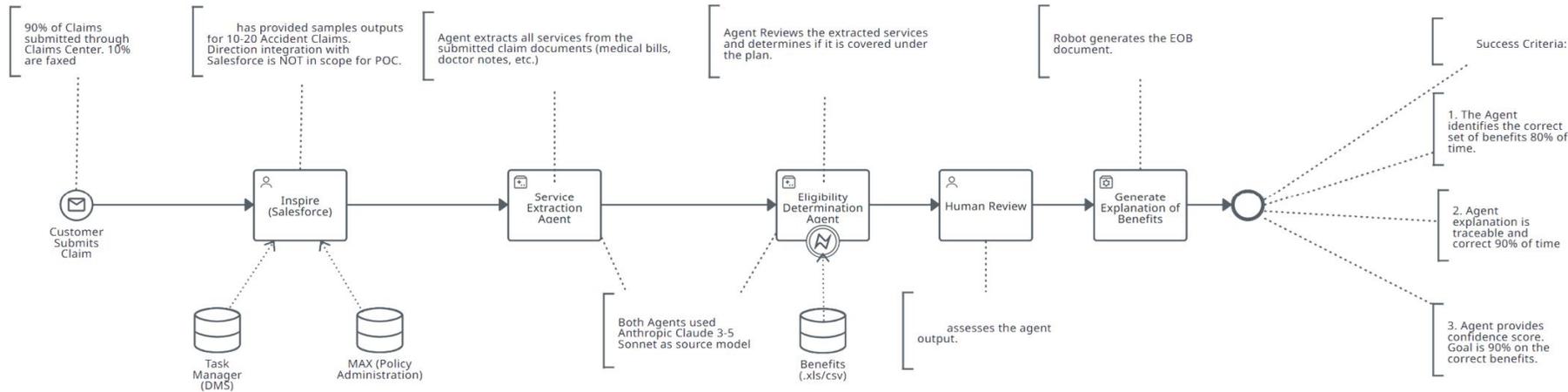
Business Problem:
- Coverage verification: outdated or fragmented enrollment data makes it hard to confirm eligibility.
- Claim submission: incomplete or delayed documentation slows claim intake and review.
- Accident validation: determining if an incident qualifies as "accidental" is often unclear and time-consuming.
- Policy interpretation: complex terms (e.g., partial vs. full loss) require careful, manual review.
- Payment processing: manual workflows delay payouts and increase risk of errors or fraud.

Solution:
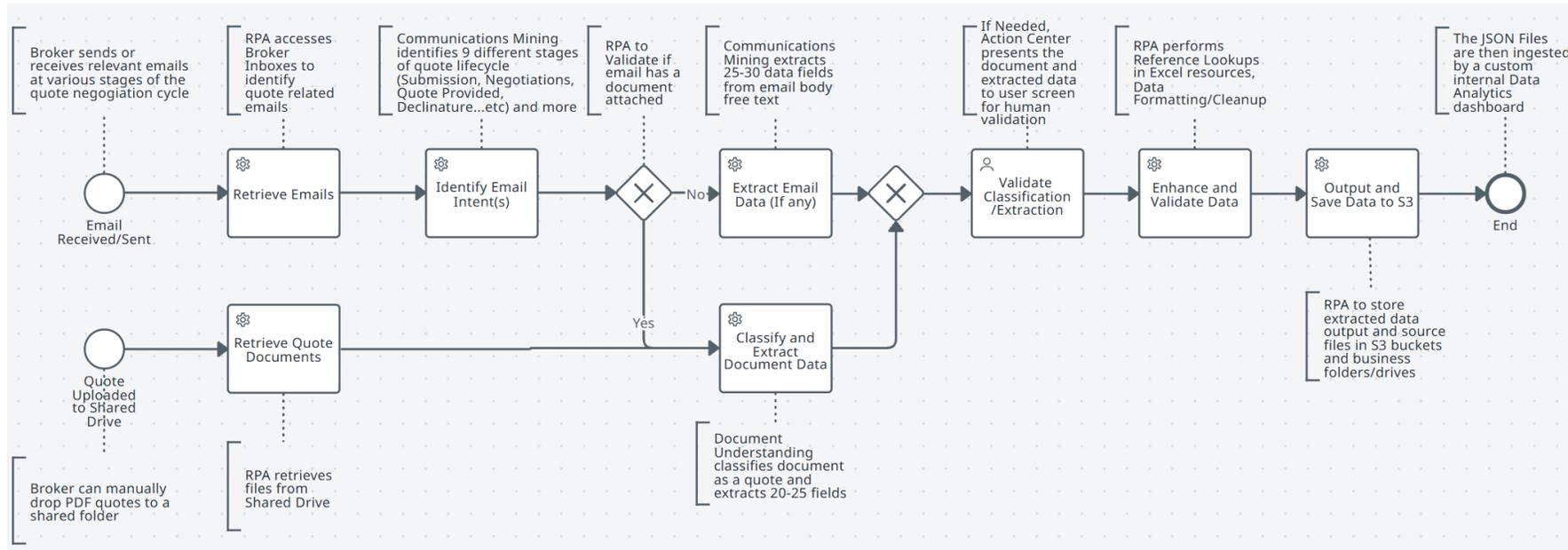- Document intake and digitization: a robot ingests claim documents and extracts structured data using IDP.
- Service extraction: an AI agent extracts injury details and claimed services.
- Policy comparison: a second agent checks services against the group plan.
- Human review: a reviewer validates the extraction and coverage match.
- EOB generation: a robot generates the Explanation of Benefits and initiates payment.

Process Diagram

90% of Claims submitted through Claims Center. 10% are faxed

has provided samples outputs for 10-20 Accident Claims. Direction integration with Salesforce is NOT in scope for POC.

Agent extracts all services from the submitted claim documents (medical bills, doctor notes, etc.)

Agent Reviews the extracted services and determines if it is covered under the plan.

Robot generates the EOB document.

Success Criteria:

1. The Agent identifies the correct set of benefits 80% of time.

2. Agent explanation is traceable and correct 90% of time

3. Agent provides confidence score. Goal is 90% on the correct benefits.

Customer Submits Claim → Inspire (Salesforce) → Service Extraction Agent → Eligibility Determination Agent → Human Review → Generate Explanation of Benefits →

Task Manager (DMS)

MAX (Policy Administration)

Both Agents used Anthropic Claude 3-5 Sonnet as source model

Benefits (.xls/csv)

assesses the agent output.

Real-world Scenario: *An employee benefits administrator processes over 6,000 claims a month in non-peak season and as high as 7,500-8,000 during peak time. Manual process takes 5-10 days in non-peak season and 15+ days in peak season. Processing takes 25-30 minutes per claim. The customer is targeting 50%-60% reduction in handling time by implementing the claims agent.*

Systems Included in Process: Case management, workflow management, Benefits Administration

Insurance Quote Extractor

Industry: *Insurance and Risk Management*
Domain: *Commercial Risk (Property)*
Persona: *Broker*
Benefactor: *Execs and Brokers*
Delivery: *UiPath Services*

UiPath

Process Flow

Broker sends or receives relevant emails at various stages of the quote negotiation cycle

RPA accesses Broker Inboxes to identify quote related emails

Communications Mining identifies 9 different stages of quote lifecycle (Submission, Negotiations, Quote Provided, Declinature...etc) and more

RPA to Validate if email has a document attached

Communications Mining extracts 25-30 data fields from email body free text

If Needed, Action Center presents the document and extracted data to user screen for human validation

RPA performs Reference Lookups in Excel resources, Data Formatting/Cleanup

The JSON Files are then ingested by a custom internal Data Analytics dashboard

Email Received/Sent → **Retrieve Emails** → **Identify Email Intent(s)** → (No) → **Extract Email Data (If any)** → **Validate Classification /Extraction** → **Enhance and Validate Data** → **Output and Save Data to S3** → **End**

(Yes) → **Classify and Extract Document Data**

Quote Uploaded to Shared Drive → **Retrieve Quote Documents**

Broker can manually drop PDF quotes to a shared folder

RPA retrieves files from Shared Drive

Document Understanding classifies document as a quote and extracts 20-25 fields

RPA to store extracted data output and source files in S3 buckets and business folders/drives

Business Problem:
Every month, at a leading global risk and insurance company, thousands of emails are exchanged between brokers and carrier underwriters to request, shop for, and negotiate insurance policy quotes for commercial risk clients. These communications often contain official quotes, either as PDF documents or directly within the email body. Previously, extracting real-time and historical data from these quotes during negotiation cycles was not feasible, creating a significant gap in market intelligence and trading analytics.

Solution:
The UiPath solution automatically retrieves negotiation communications and quote documents from broker inboxes and shared drives, historically and in real time. For each email and document, it identifies the intent and negotiation stage, extracts 25–30 data fields, and, when necessary, presents the extracted data alongside the original documents to brokers for human validation. The solution then enhances, validates, and reformats the data before outputting it for ingestion by the client's custom Broker Data Analytics dashboard.
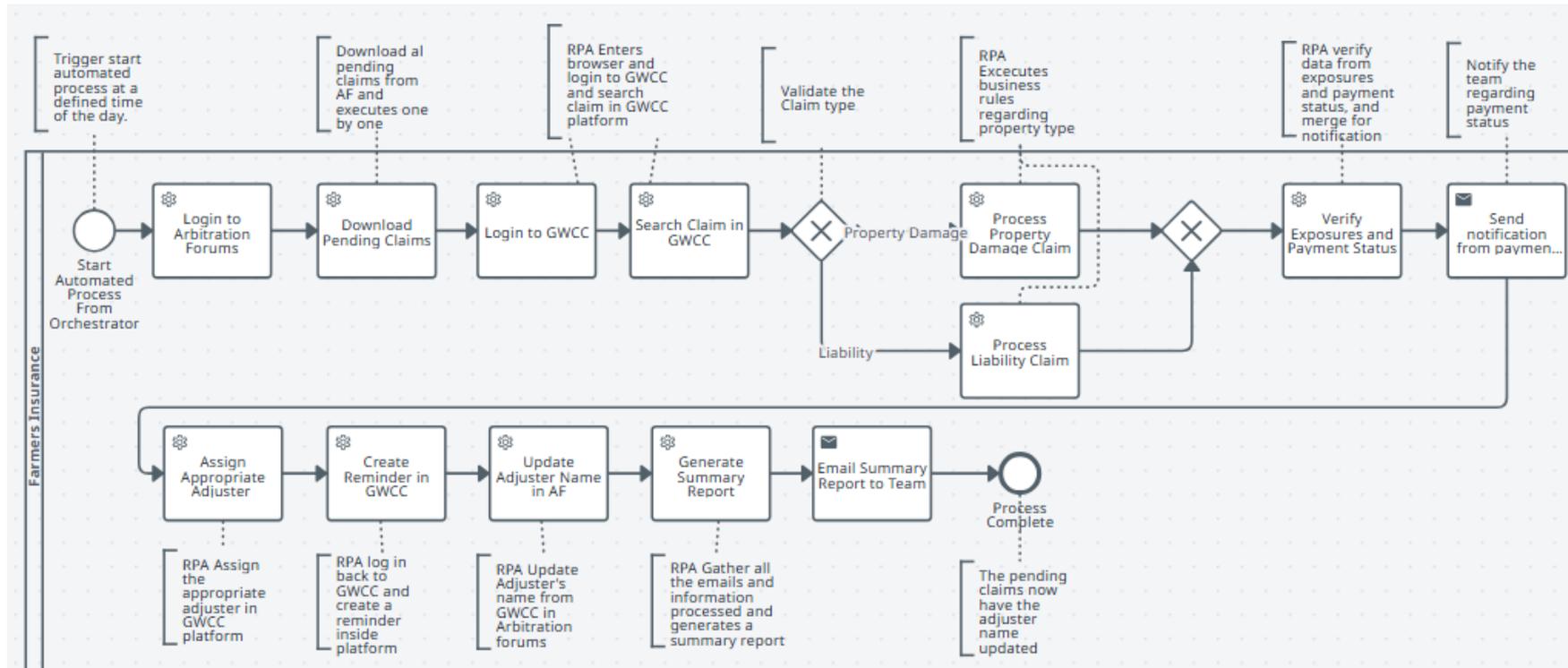
Systems Included in Process: Outlook, shared drive, S3 Bucket, Excel
UiPath Capabilities: Communications mining, document understanding, RPA

Time to Deploy: 18–20 Weeks

Real-world Scenario: *When a broker receives a client request for coverage, they use an intelligent document processing system that analyzes communications from both historical archives and recent submissions. The solution extracts key data points, presenting coverage options alongside trend data that reveals pricing patterns and market shifts. This transforms hours of manual review into a brief consultation, allowing brokers to identify optimal solutions and negotiate effectively using real-time rates and historical insights.*

Pending Claims Adjuster Update

Industry: *Insurance*
Domain: *Subrogation*
Persona: *Claims rep*
Benefactor: *Execs, and Claims rep*
Delivery: *UiPath Services*

UiPath

Farmers Insurance

Trigger start automated process at a defined time of the day.

Start Automated Process From Orchestrator

Login to Arbitration Forums

Download al pending claims from AF and executes one by one

Download Pending Claims

RPA Enters browser and login to GWCC and search claim in GWCC platform

Login to GWCC

Search Claim in GWCC

Validate the Claim type

Property Damage

Liability

RPA Excecutes business rules regarding property type

Process Property Damage Claim

Process Liability Claim

RPA verify data from exposures and payment status, and merge for notification

Verify Exposures and Payment Status

Notify the team regarding payment status

Send notification from paymen...

Assign Appropriate Adjuster

RPA Assign the appropriate adjuster in GWCC platform

Create Reminder in GWCC

RPA log in back to GWCC and create a reminder inside platform

Update Adjuster Name in AF

RPA Update Adjuster's name from GWCC in Arbitration forums

Generate Summary Report

RPA Gather all the emails and information processed and generates a summary report

Email Summary Report to Team

Process Complete

The pending claims now have the adjuster name updated

Business Problem:
Claims representatives, working full time, are currently responsible for the manual assignment of adjusters. Their duties involve downloading the pending cases from the Arbitration Forum page, searching for the claim in the GWCC system, identifying the claim type and exposure, verifying whether payments have been made, assigning someone from the corresponding group, and finally, updating the adjuster's name in the Arbitration Forum.

Solution:
The UiPath solution automatically retrieves pending claims from the Arbitration Forums. For each pending claim it identifies type and exposure in GWCC, check payments and notify the team, then assign the adjuster from the corresponding group and creates a general reminder in GWCC. The solution then updates the adjuster in Arbitration Forums and creates a summary report of the claims worked for the team to review.

Systems & Tools:
Microsoft Outlook, Excel, GWCC portal
UiPath Capabilities: RPA unattended, Orchestrator

Real-world Scenario: *A claims team was burdened with hours of manual case handling and adjuster assignment. By automating the workflow with UiPath, the process now runs end-to-end without human intervention. The robot logs into external systems, downloads pending claims, verifies key details, assigns adjusters, updates systems, and generates summary reports. This automation reduced manual effort by 80%, minimized errors, and allowed the team to focus on higher-value tasks.*

Underwriting Incoming Email Classification (Endorsements)

Industry: Insurance
Domain: Underwriting
Persona: Underwriters
Benefactor: Execs, and underwriters
Delivery: UiPath Services

UiPath
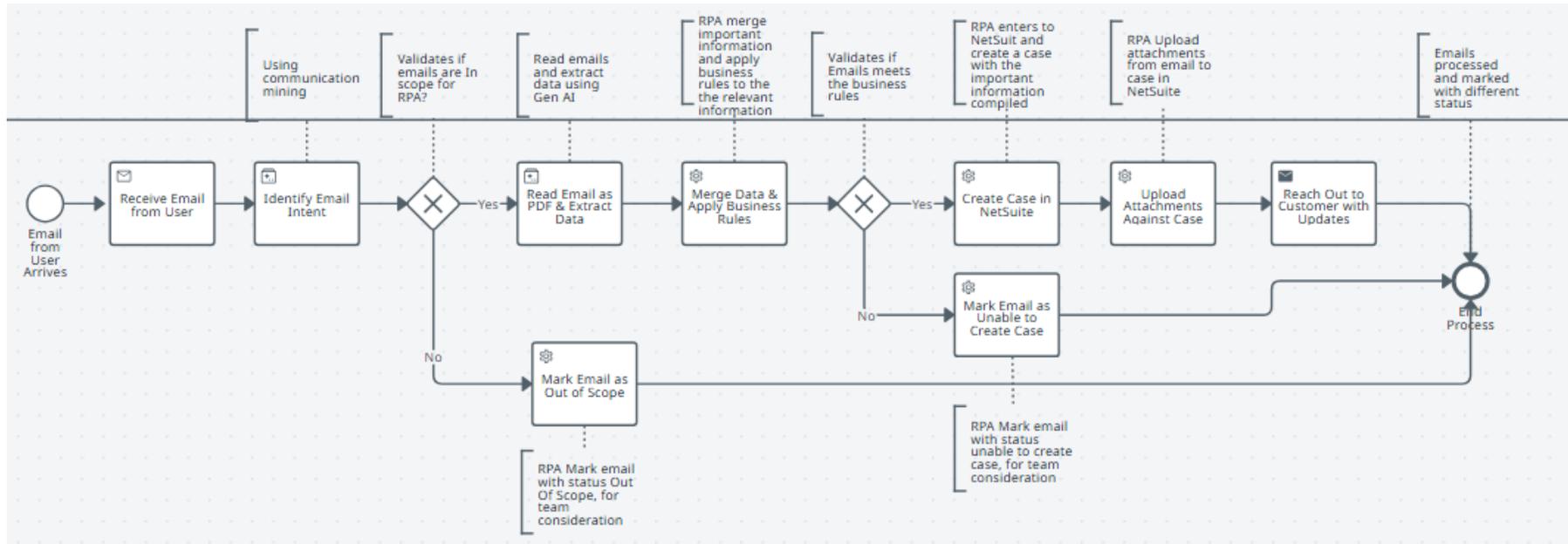
Business Problem:
Every day, email requests arrive pertaining to insurance queries. These requests can range from new submissions, endorsements, claims, renewals, to requesting general information. However, these emails are sent by users, they often come in an unstructured format and the attachments provided do not follow a standard format. This makes the extraction of relevant information and the creation of a case in NetSuite a challenging and time-consuming process.

Solution:
The UiPath solution combines UiPath Communications Mining™, GenAI, core RPA, and UiPath Insights. Communications Mining identifies the intent of the incoming email, classifies it, and extracts relevant information from the email, Additionally, the solution leverages the GenAI activities to extract the information from the attachments. Then, Insights is used to create custom dashboards for the business to track transaction information and to streamline the solution further. Afterwards, RPA creates the case in NetSuite.

Real-world Scenario: *An underwriting team faced growing backlogs due to manually handling over 200 unstructured email requests weekly. With UiPath Communications Mining™ and automation, incoming emails are now automatically classified, key data is extracted using GenAI, and cases are created in NetSuite with attachments and customer notifications—completely unattended. This solution cut processing time by 50%, cleared backlogs, and freed the team to focus on complex work and data-driven insights.*

Systems & Tools: Outlook, NetSuite
UiPath Capabilities: Communications Mining, RPA, Gen AI and Insights

Time to Deploy: 16 weeks

Benefit Summary Assistant
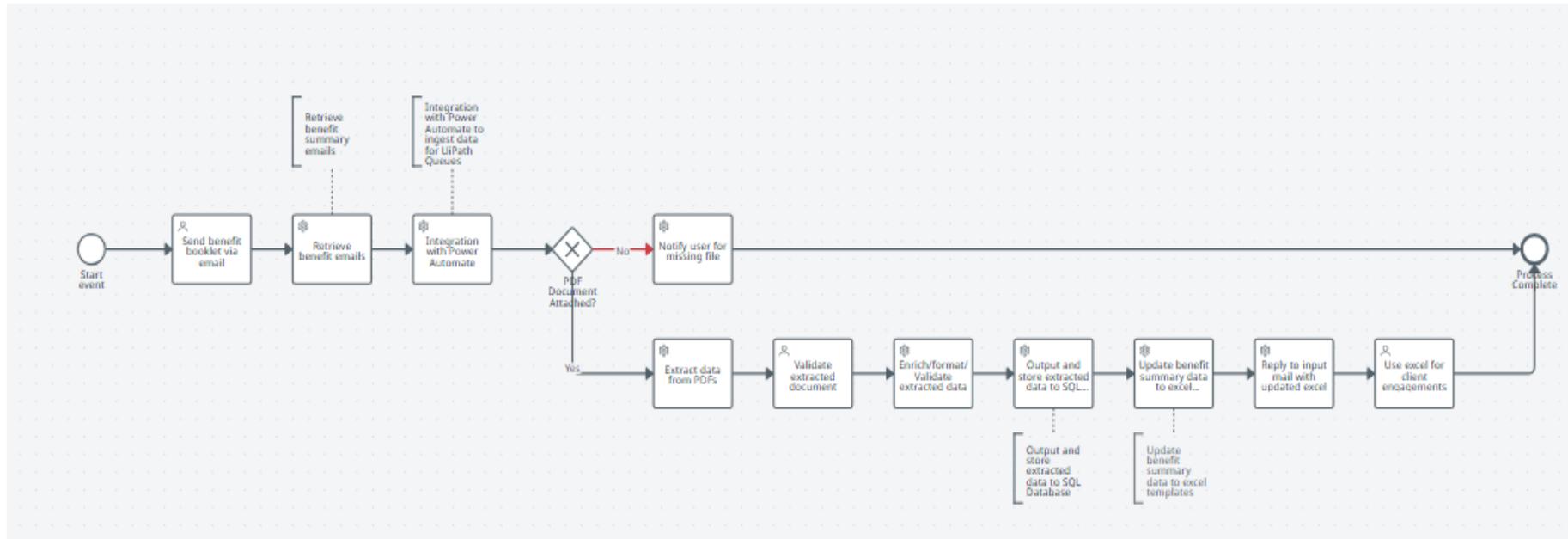
Industry: Insurance
Domain: Finance
Persona: Benefits Manager
Benefactor: Analysts
Delivery: UiPath Services

UiPath

Business Problem:
Each day, insurance carriers send a variety of benefits booklets tailored to different employee classes. Analysts must read through each document, identify covered benefits by class, and manually populate a standardized Excel template. This template is used to compare benefit plans and support client discussions. However, each booklet can be lengthy and complex, taking up to two hours to process manually. With monthly volumes reaching up to 1,000 booklets, the manual workload has become unsustainable, leading to bottlenecks and reduced productivity for the analyst team.

Solution:
UiPath implemented an automation solution using the generative extractor capability. This AI-powered solution extracts data from carrier booklets (Sun Life, Manulife, Canada Life), automatically ingests it into a database, and transforms it into standardized Excel templates via RPA. The automation responds to input emails with completed Excel files, reducing processing time and allowing analysts to focus on higher-value client engagement.


Real-world Scenario: *A benefits manager needs to compare insurance plans for hundreds of employees across multiple groups. An AI-powered automation solution processes carrier documents, extracts key data, and creates standardized reports in under an hour. This turns a week-long manual effort into a same-day task, enabling faster decision making and more effective negotiations for improved coverage and lower costs.*

Systems & Tools: Outlook, Excel, SQL Database, PDF Files
UiPath Capabilities: Communications mining, document understanding, RPA

Time to Deploy: 13–15 weeks

Contract Classification and Routing

Industry: Insurance
Domain: Finance
Persona: Benefits Manager
Benefactor: Analysts
Delivery: UiPath Services

UiPath
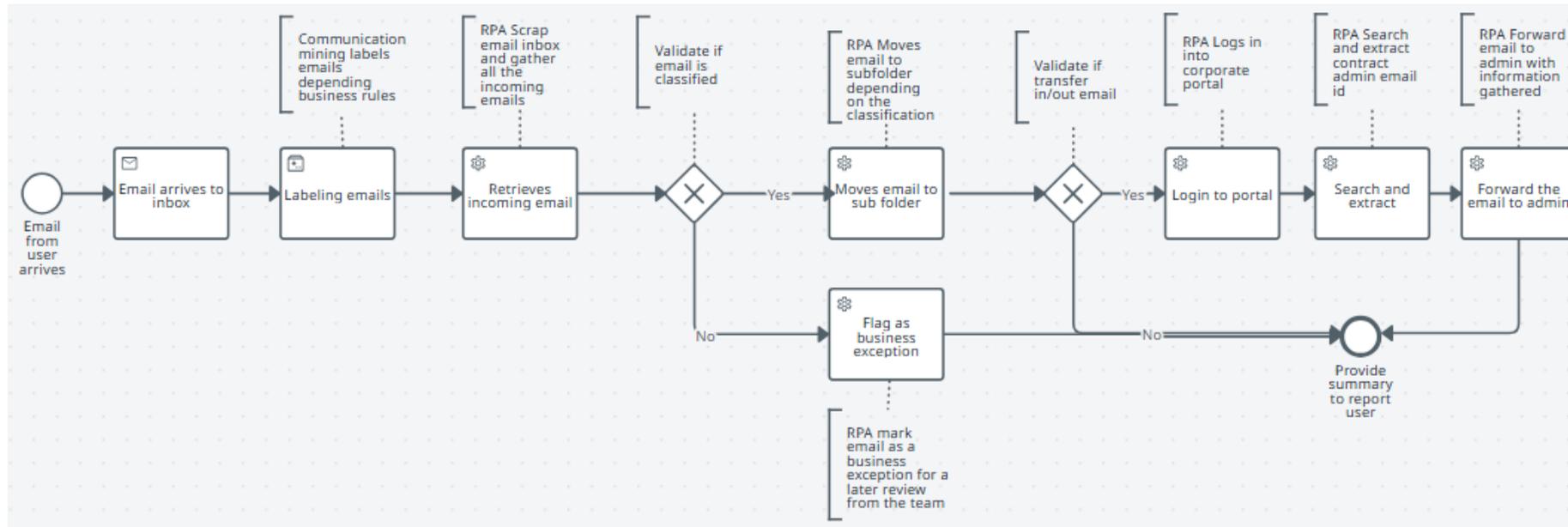
Business Problem:
The contracting team faces challenges with manual email processing. Six staff members must manually review, categorize, and route high-volume customer emails across 20+ categories, creating bottlenecks and delays. For Transfer In/Out emails, additional time is required to access portals, search broker information, and identify contract administrators before forwarding. This labor-intensive process creates capacity constraints, potentially causing delayed responses to time-critical customer inquiries. The team struggles to maintain efficient service levels during peak email volumes.

Solution:
The UiPath Solution combines Communication Mining, RPA and Insights. Communication Mining with NLP automatically categorizes incoming emails across 20+ categories and routes them to appropriate subfolders. For Transfer In/Out emails, an RPA robot extracts broker information, searches portal systems, and forwards emails to relevant contract administrators. This automation eliminates manual bottlenecks, provides 24/7 processing, and reduces handling time from hours to minutes while maintaining accuracy regardless of volume.


Communication mining labels emails depending business rules

RPA Scrap email inbox and gather all the incoming emails

Validate if email is classified

RPA Moves email to subfolder depending on the classification

Validate if transfer in/out email

RPA Logs in into corporate portal

RPA Search and extract contract admin email id

RPA Forward email to admin with information gathered

Email from user arrives — Email arrives to inbox — Labeling emails — Retrieves incoming email — Yes — Moves email to sub folder — Yes — Login to portal — Search and extract — Forward the email to admin

No — Flag as business exception

RPA mark email as a business exception for a later review from the team

No — Provide summary to report user

Real-world Scenario: A contracting team was struggling with high email volumes across numerous categories, causing delays and impacting service quality. An automation solution with natural language processing now categorizes and routes emails automatically, while robots handle specific requests end to end. This cut processing time from hours to minutes, improved accuracy, and enabled 24/7 service, freeing the team to focus on complex customer needs.

Systems & Tools: Outlook, subfolders, portal
UiPath Capabilities: Communication mining, Insights, RPA unattended

Time to Deploy: 11 weeks

Renewal Updates in HART

Industry: Insurance
Domain: Employee Benefits
Persona: Benefits Manager
Benefactor: Benefit Manager
Delivery: UiPath Services

UiPath
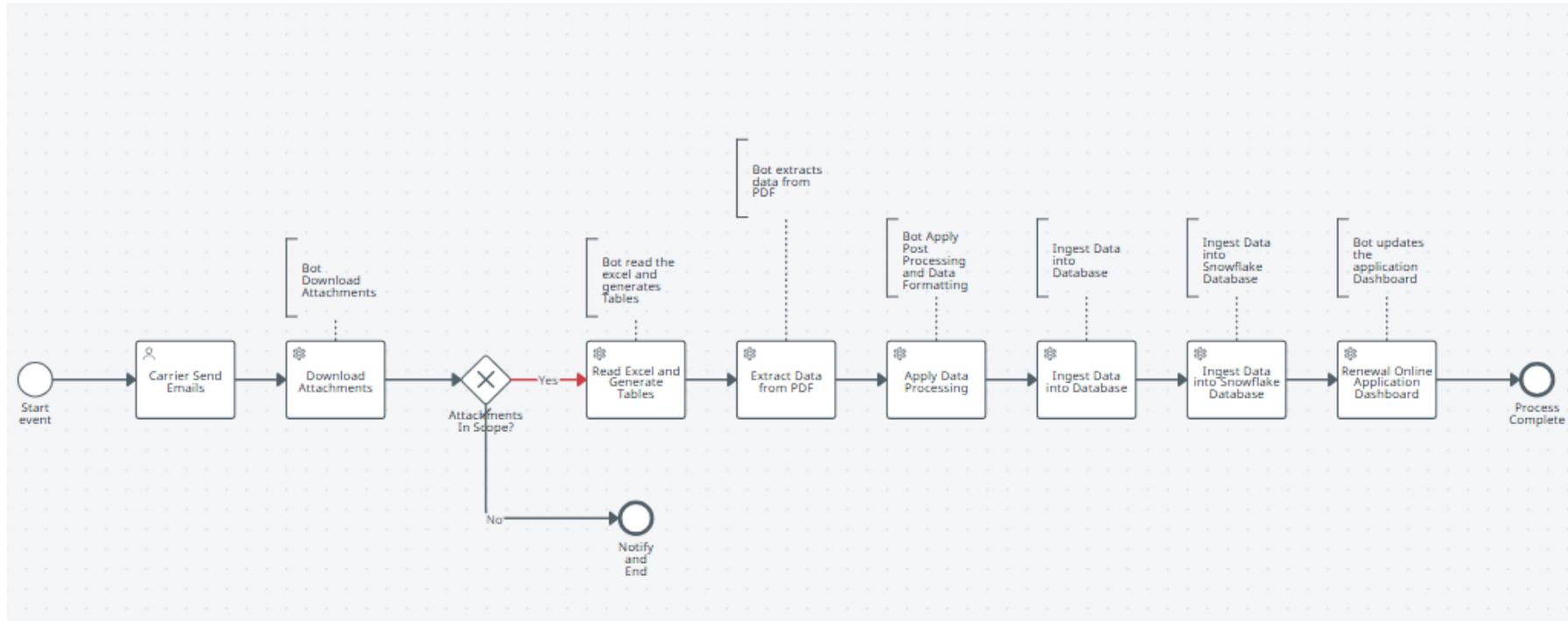
Business Problem:
Carriers submit daily renewal details for policies to the Employee Benefit department, including demographic data, experience summaries, rates, and claims in Excel and PDF formats (English and French). Analysts review documents to extract renewal details and apply calculations, creating a comprehensive report. This report is shared with the Dashboard team for informed policy renewal decisions.

Solution:
UiPath addressed daily renewal package processing by implementing an automated system using GenAI activities, core RPA, and UiPath Insights. This solution extracts data from carrier-submitted Excel sheets and PDFs in both English and French, standardizes information, performs modifications, and integrates it into a centralized database. This approach reduces manual effort, minimizes errors, and improves data consistency.

Real-world Scenario: *A benefits team previously spent days manually reviewing carrier submissions for employee benefit renewals. An automation solution now processes documents in multiple languages, extracts data from various formats, standardizes it, and generates detailed comparisons. Complete analyses are delivered within hours, enabling real-time access to policy details, stronger negotiations, and improved benefit offerings—reducing administrative work by over 70%.*

Systems & Tools: Outlook, Excel, Snowflake, PDF files
UiPath Capabilities: Communications mining, document understanding, RPA

Time to Deploy: 13-15 Weeks

Endorsements
Document Extraction and Classification Agent (Material/Non-Material)

Industry: Insurance
Domain: Underwriting
Persona: Underwriters
Benefactor: Execs, and underwriters
Delivery: UiPath Services

UiPath

Business Problem:
Every day, email requests arrive pertaining to endorsements or amending the current policy. A team will be tasked with reading this emails and documents determining if the change requested is material or non-material. Based on this, they will route the email to the appropriate queue.
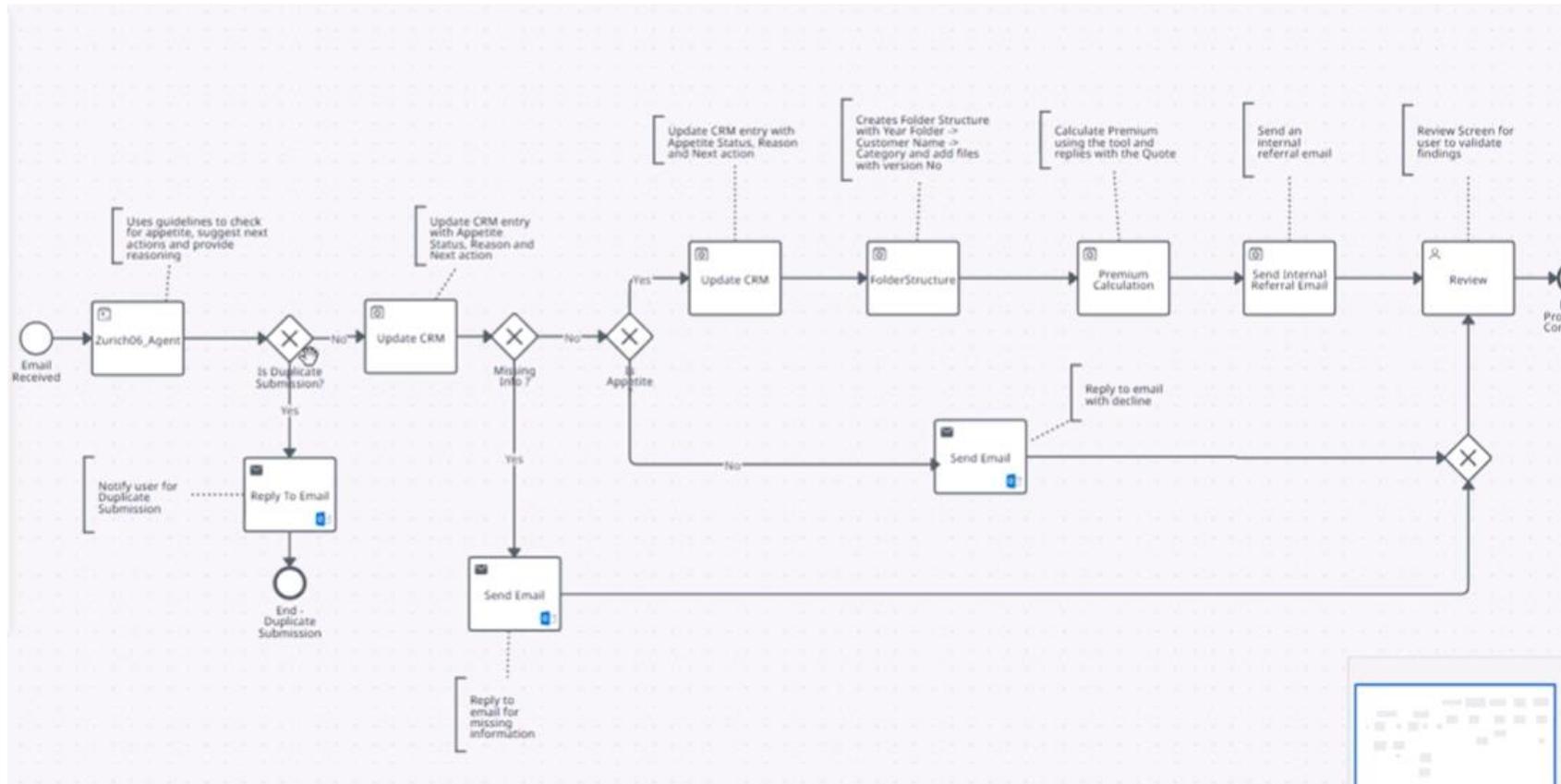
Solution:
The UiPath solution utilizes agentic automation to review the documents and determine if the change is material or not, based on the system prompt that is created (based on the customer's policies).

Real-world Scenario: BPO teams are tasked with doing basic classification problems. They're often overwhelmed, not always accurate, and a large cost to the business. With an AI agent, you can automate these lower-level activities with accuracy and speed.

Systems & Tools: Outlook, NetSuite
UiPath Capabilities: Agent Builder

Time to Deploy: 4 weeks

Underwriting: Broker Submissions

Industry: Insurance
Domain: Underwriting
Persona: Underwriters
Benefactor: Execs, and underwriters
Delivery: UiPath Services

Business Problem:
Email-based workflows create inconsistencies and compliance risk. Duplicate and incomplete submissions cost time and credibility. Slow broker communication reduces competitiveness.

Solution:
Accelerated quote turnaround. Agents evaluate appetite and reply to brokers within minutes. AI agents extract, structure, and validate submission details automatically. Underwriters only perform the final reviews and handle exceptions or high-value decisions.
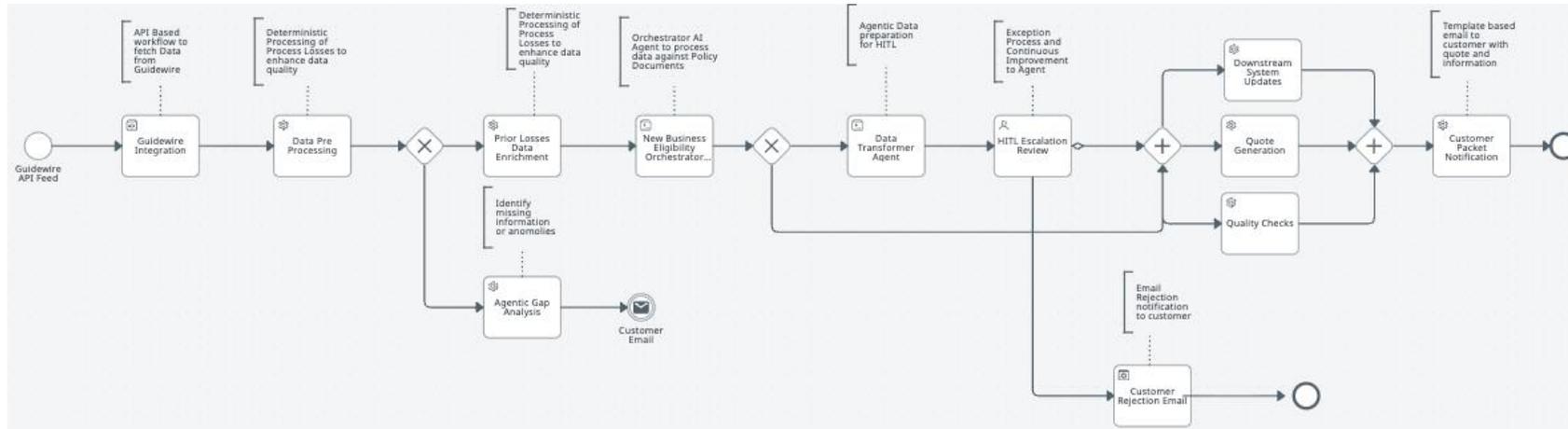
Home Insurance Policy Eligibility Determination

Vertical: *Home Insurance*
Horizontal: *Underwriting / New Business Eligibility*
Persona: *Underwriting Analyst*
Benefactor: *Underwriting Operations Team & Prospective Policyholders*

UiPath

Business Problem:
Home insurance policy eligibility determination is a core underwriting function that evaluates whether an applicant qualifies for coverage based on prior loss history, risk indicators, and policy rules. Today, underwriters manually reconcile multiple sources—such as prior loss reports, inspection data, and applicant-submitted documents—within systems like Guidewire. This manual effort slows down policy issuance, increases the chance of data inconsistency, and limits scalability across high application volumes.

Solution:
A UiPath agentic automation solution orchestrates the end-to-end eligibility determination process for new home insurance applicants. Specialized AI agents extract, validate, and cross-reference data from structured and unstructured sources (e.g., prior loss histories, property inspection reports, eligibility documents).
An AI Underwriting Agent automates data enrichment and validation steps, while the Eligibility Orchestrator coordinates review workflows and routes exceptions to human underwriters through a human-in-the-loop (HITL) review step.

Systems Included in Process: Guidewire

Real-world Scenario: The team processes about 70,000 transactions annually, each taking up to 10 minutes to complete. This slow turnaround directly impacts revenue, as faster responses increase the likelihood of capturing business. Manual review creates friction through incorrect determinations and a lack of a clear audit trail explaining decisions, reducing accuracy and limiting the organization's ability to optimize quote conversion and revenue capture.
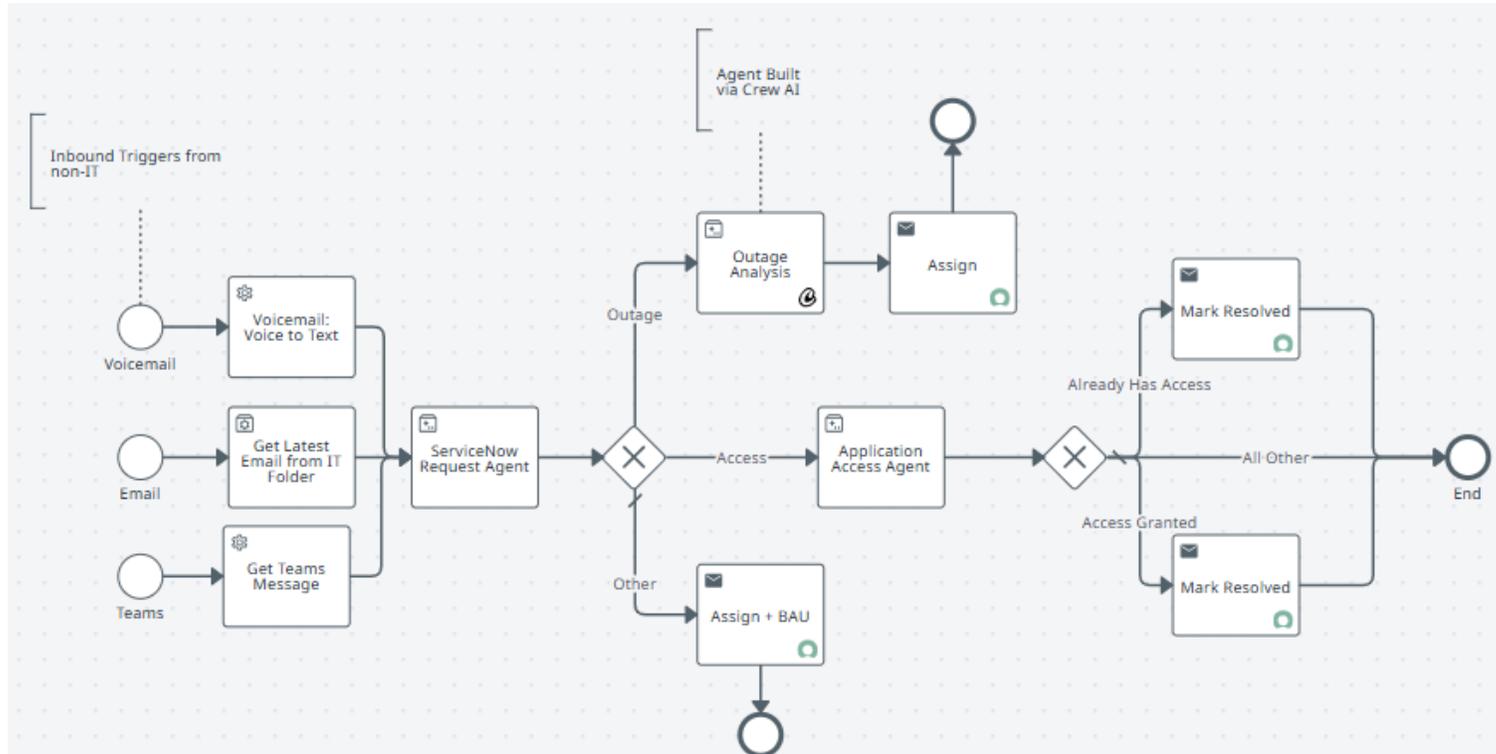
UiPath

IT

ITSM: Intelligent Triage

Vertical: *Any (Insurance)*
Horizontal: *IT*
Persona: *Service Desk Agent*
Benefactor: *IT Operations Manager,*

UiPath

Business Problem:
This insurance customer spends hundreds of thousands of hours on internal IT operations. Their CIO wants to streamline operations and free up IT personnel so they can focus on higher-value activities such as outage triage and prevention.

Solution:
With agentic automation, they will be able to intelligently triage IT requests and handle simple tasks without human intervention. A ServiceNow agent will work to categorize requests. UiPath and third-party agents will handle specific request types, such as application access requests.

The UiPath Platform™ enables UI automation to be leveraged as a tool for AI agents to validate application access.

Systems Included in Process:
ServiceNow, Atlassian

ITSM: Incident Management

Industry: N/A
Domain: ITSM
Persona: Technical Owners
Benefactor: Execs, Tech Owners, Customers
Delivery: UiPath Services

UiPath

Process Flow

- Incident occurs, and High Severity ServiceNow ticket is generated
- User inputs Ticket # in Assistant (Chat UI)
- RPA retrieves the ticket details from ServiceNow
- Agent analyzes and identifies context of ticket
- RPA to retrieve tickets with ServiceNow integration
- Agent analyzes historical tickets with similar or related descriptions, and identifies past resolutions, unsuccessful methods, and more
- Agent summarizes and structures all findings in a concise format for the user
- Results are presented back to user in UiPath Assistant
- User Reviews the analysis report and uses the info to support Root Cause Analysis and faster time to resolution

Start → Input ServiceNow Ticket Number → Lookup Ticket Details in ServiceNow → Analyze Ticket Details → Retrieve Historical ServiceNow... → (+) → Analyze Historical Tickets → (+) → Summarize Findings → Present Results to User → End Process

- Agent searches recent deployment tickets to identify is any are related to the incident → Analyze Recent Deployment Changes
- Agent identifies if any new ServiceNow tickets are related to the incident and generates an automatic linked list → Monitor and Analyze New Related Tickets
- Agent masks confidential data and searches public domains for potential solutions/recommendations of the reported incident error → Search Public Domains Resolutions

Real-world Scenario: When a critical system outage occurs, the system owners activate an intelligent response assistant by entering the incident ticket number. The system quickly analyzes historical incidents, deployment changes, and related tickets while searching knowledge bases for solutions. This rapid analysis occurs during Major Incident Management (MIM) calls where multiple stakeholders collaborate on troubleshooting—delivering insights in seconds that would take 15-20 minutes to research manually, enabling faster resolution and reducing business impact.

Business Problem:
During ~30-60min Major Incident Management calls at a leading investment management firm, 10-30 technical owners manually search through ServiceNow tickets to find relevant historical information. This time-consuming process delays incident resolution and impacts operational efficiency, the firm's ability to meet SLAs, and their customer expectations.
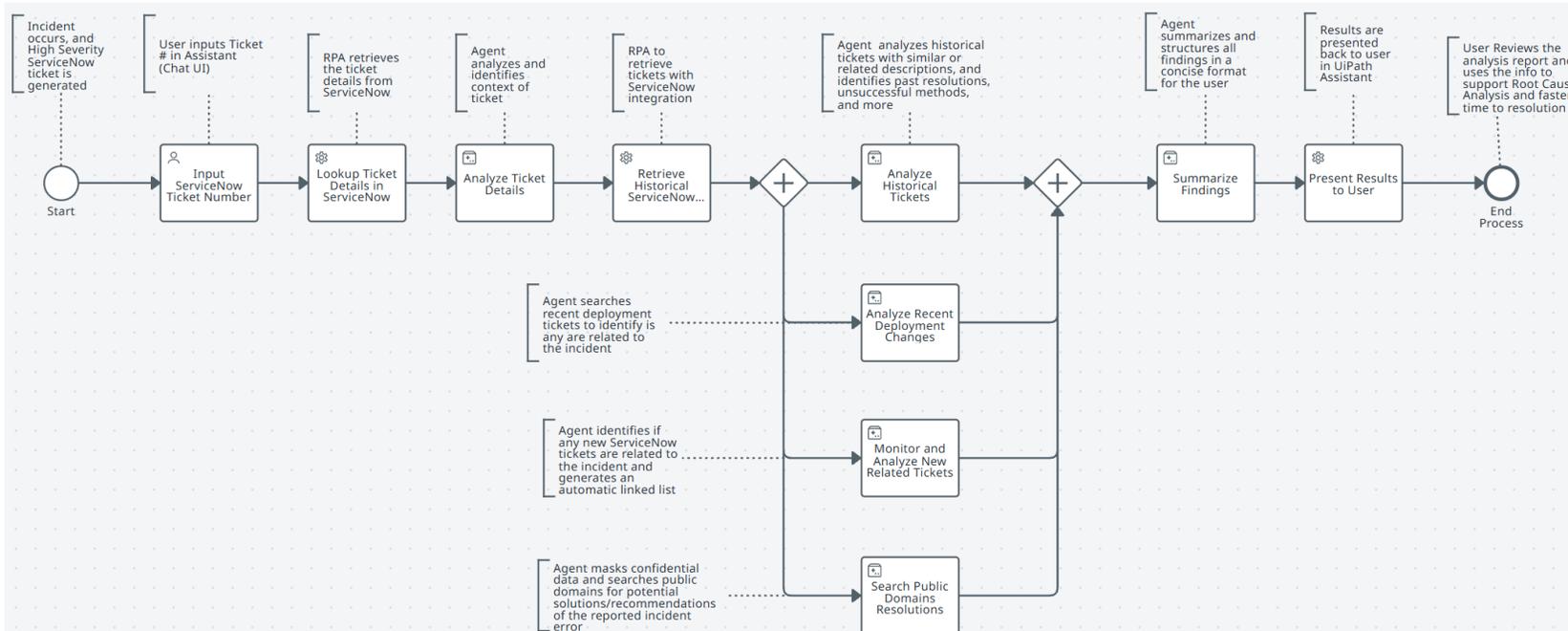
Solution:
UiPath implemented an agentic AI PoC to retrieve and analyze relevant ServiceNow historical incident and change tickets, providing quick insights into past resolutions, common issues, and recent system changes. This automated analysis is presented to technical owners through UiPath Assistant, enabling fast and informed decision making during critical incident resolution processes.

Systems & Tools: ServiceNow, seb Search
UiPath Capabilities: Agent, Assistant

Time to Deploy: 13 weeks

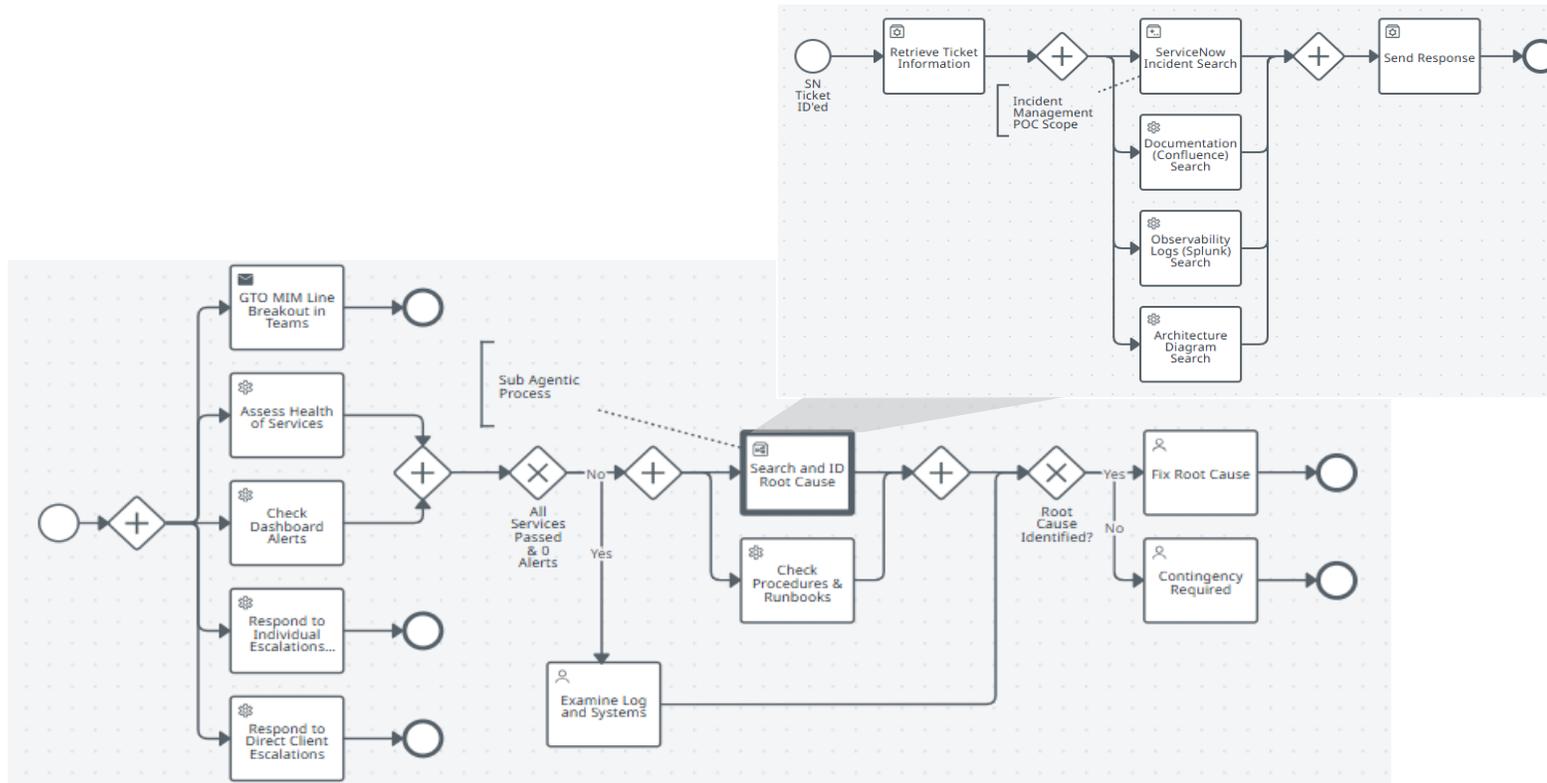# ITSM: Incident Management

UiPath

Business Problem:
Incident management in large organizations often involves time-consuming manual searches for relevant historical information. This process delays incident resolution, impacting operational efficiency and the ability to meet service level agreements (SLAs).

Solution:
As part of an agentic AI PoC, UiPath implemented a solution to retrieve and analyze relevant ServiceNow historical incident and change tickets, providing quick insights into past resolutions, common issues, and recent system changes. Currently, this automated analysis is presented to technical owners through UiPath Assistant, enabling faster and more informed decision making during critical incident resolution processes. Future plans include deploying this agent as part of a larger UiPath Maestro flow (as pictured here).

Real-world Scenario: *During incident management calls, 10-30 technical owners spend 30-60 minutes manually searching ServiceNow tickets for relevant historical data. This time-consuming process impacts operational efficiency and SLAs, risking significant damage to customer experience on their Personal Investor Technology platforms. In 2024, customer handled over 260,000 incidents, with key risks including loss of investor confidence and potential regulatory fines.*

Systems Included in Process:
ServiceNow

Time to Deploy: 13 weeks

IT: Security Framework Gap Analysis

UiPath
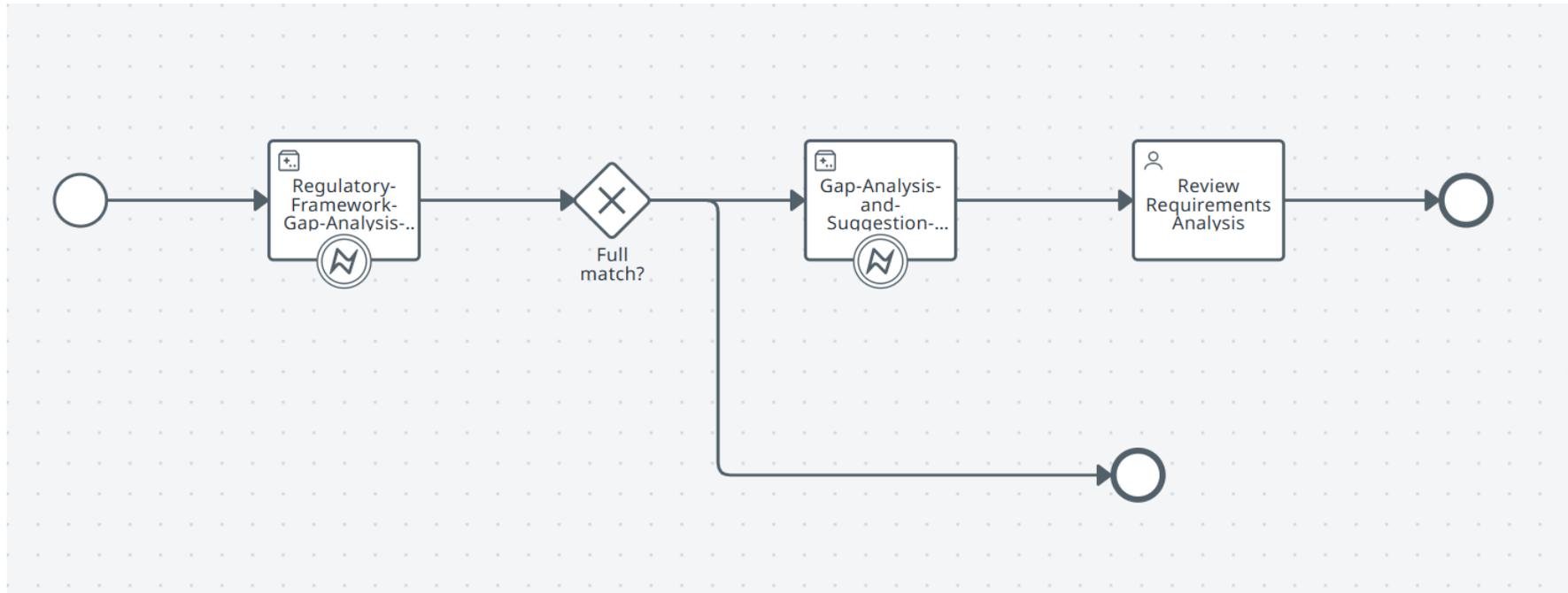
Business Problem:
New regulatory requirements from U.S. National Institute of Standards and Technology (NIST) and other agencies are periodically released and require deep analysis to understand whether a company's internal controls adhere to new requirements.

Solution:
AI agents ingest the new requirements and cross-reference to internal technical requirement descriptions. Any gaps identified are then further analyzed, ranked, and suggestions created on actions to take to close the gaps. A report is generated to send to the IT team on recommended actions.

Systems Included in Process:
Regulatory reports, internal files

IT: Vendor Onboarding

Vertical: *Any*
Horizontal: *IT*
Persona: *Procurement Teams*
Benefactor: *Vendor, Chief Procurement Officer*

UiPath

Business Problem:
Vendor onboarding often includes:
- Incomplete or delayed documentation
- Multiple follow-ups needed
- Compliance and risk checks
- Data inconsistencies
- Manual processes
- Poor vendor experience
- Integration issues
- Approval bottlenecks
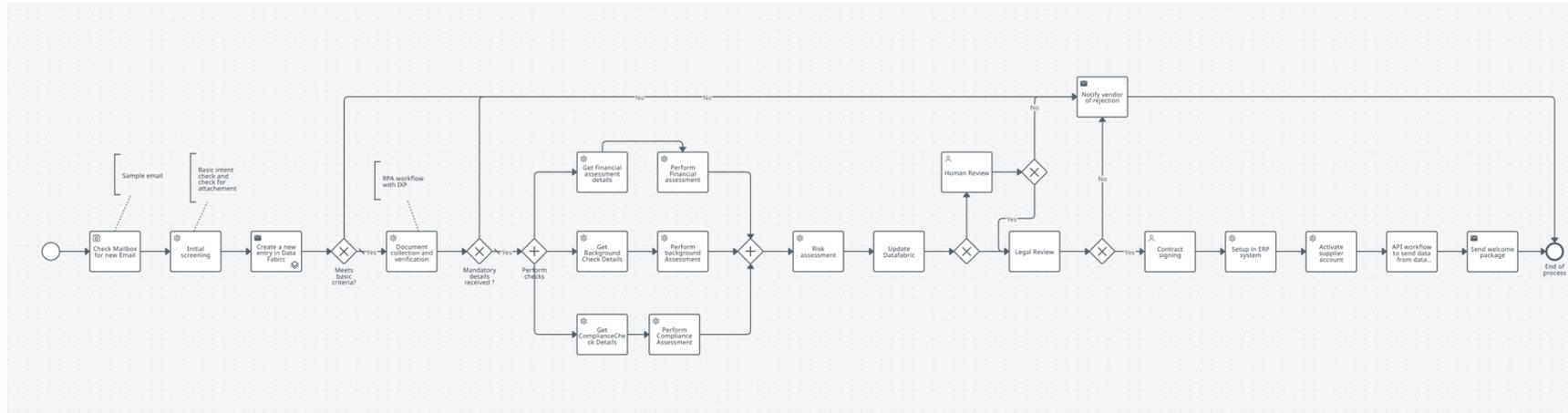
Solution:
Streamline vendor onboarding by digitizing data collection, validating documents, and automating compliance/risk checks. Integrate robots with ERP systems, orchestrate approvals through UiPath Action Center, and keep vendors updated with automated communications.

Systems Included in Process: ERP systems UiPath Capabilities: Robots, Action Center

Sales: Executive Research

Vertical: *Any*
Horizontal: *Sales*
Persona: *AE and Sales Director*
Benefactor: *Executive*
Partner: *Internal UiPath Pro-Serv.*

UiPath

Business Problem:
Sales leadership meets with client executives to expand their business relationships for payments, insurance, and fleet management.

Sales reps and leaders must brief senior leadership on client personnel and trends prior to meetings, which is high effort.

Solution:
Customer developed an agentic process that gathers data and synthesizes critical meeting topics leveraging multiple AI agents.

The AI agents provide internal and external search functionality, as well as summarization and analysis of gathered data, including which products they leverage, which are in scope, and what is happening within the account.
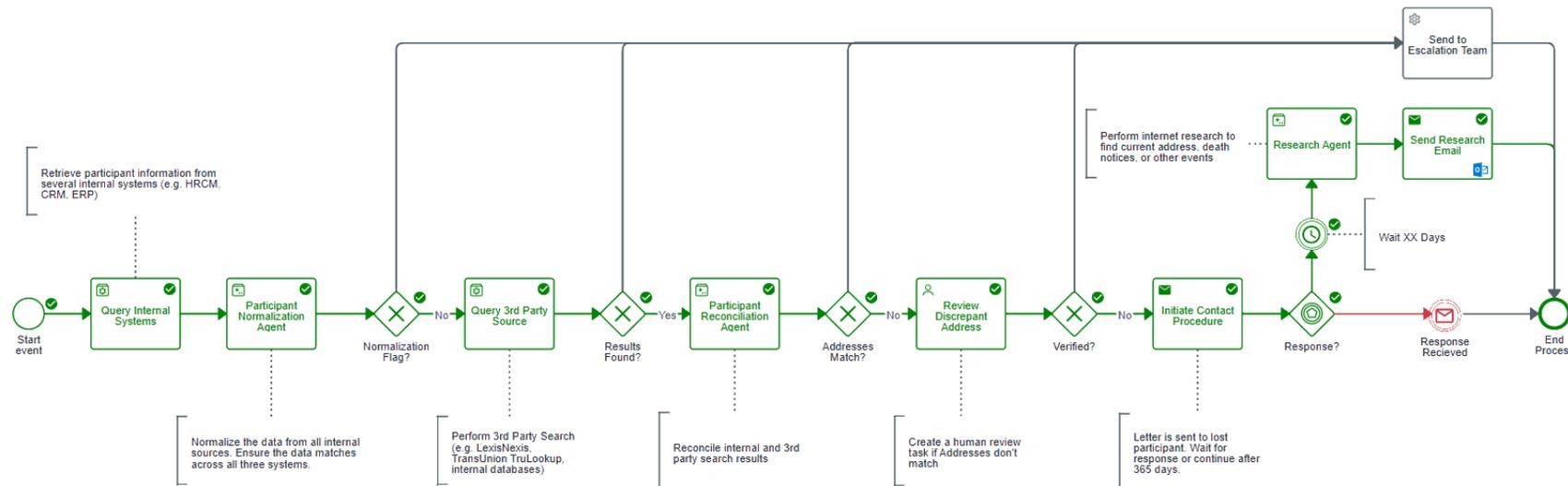
Sales leaders are provided AI-driven topics and key points within minutes.

Systems Included in Process: Salesforce, Google Workspace, internal databases
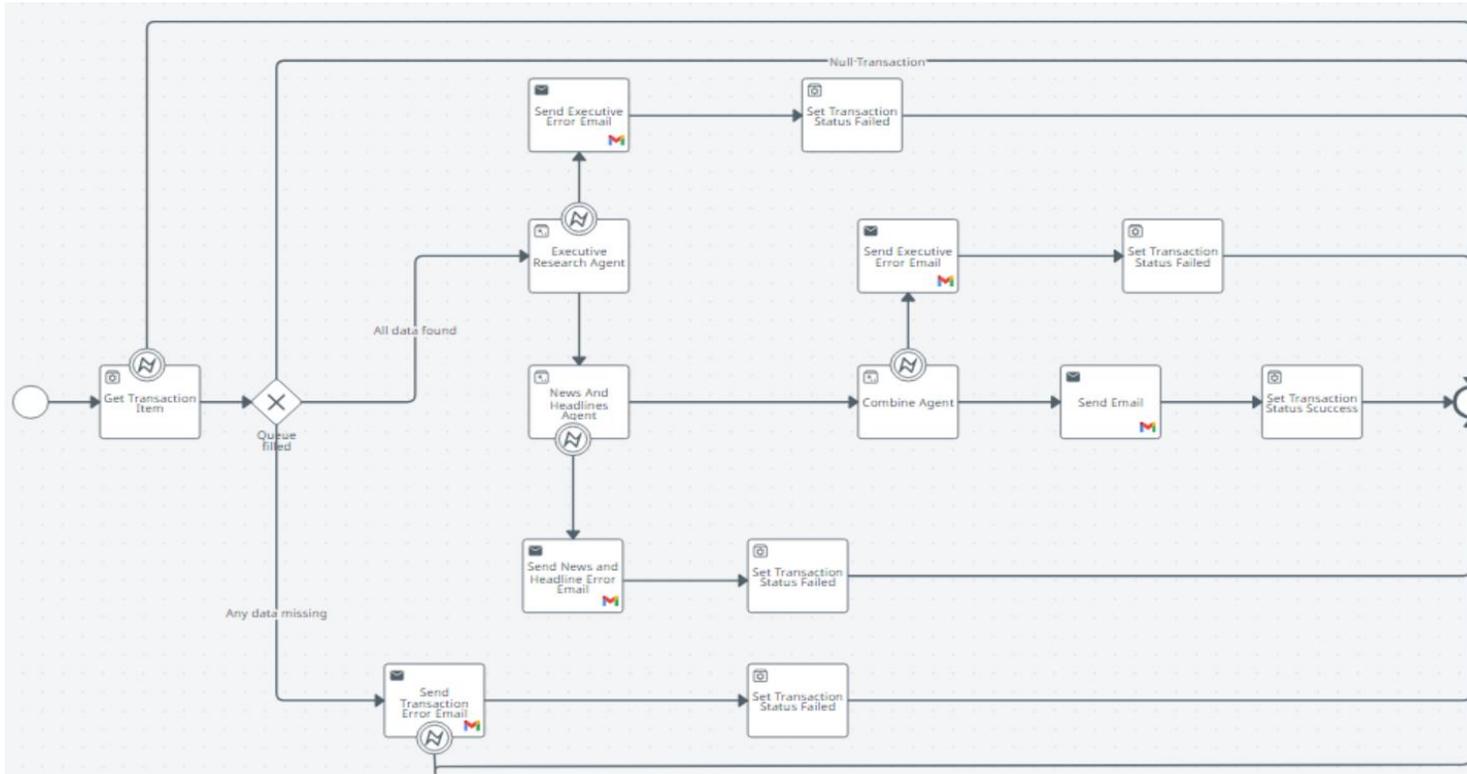
Pension Lost Participants: Discrepant Address

Vertical: *Any*
Horizontal: *HR*
Persona: *Pension Administration Officer*
Benefactor: *Pensioner, Head of Operations, COO CHRO*

UiPath

Business Problem:
- A discrepant address occurs when a former employee's address is incorrect or mail is returned.
- Companies must resolve these issues quarterly to comply with U.S. Department of Labor (DOL) rules.
- Steps include checking internal records, using locator tools, and contacting the person via phone, email, or mail.
- If the individual can't be reached, they may be classified as a lost participant.
- All efforts must be documented to show good-faith compliance.

Solution:
- Robots pull and standardize participant data from internal systems (HCM, PeopleSoft, Empower).
- Agents flag discrepancies; robots trigger third-party searches; agents reconcile results.
- Unmatched cases go to human review, then proceed with automated outreach or online research.

Systems Included in Process: Oracle Human Capital Management (HCM), PeopleSoft, Empower, LexisNexis, TransUnion, internal databases

Real-world Scenario: *A large financial institution has 5,000+ former employees and 35,000+ of these requests a year. Before automation/agents they could only spot check a small percentage of these requests, exposing them to compliance risk. Updating and modernizing systems is time intensive and expensive.*

UiPath

Finance and accounting

F&A: Contract Review

Vertical: *Any*
Horizontal: *Record to Report*
Persona: *Finance Analyst*
Benefactor: *Chief Accounting Officer*
Services: *Accenture + UiPath Services*

Business Problem:
To recognize revenue, the finance team must review contract terms (currently a manual process). They will do a contract review with data from the physical document to understand the products sold as well as the terms for each line item.

Solution:
- Robotic workflow will be utilized to get the necessary contracts for review based on open items in an Excel spreadsheet.
- Then, a classification agent will be utilized to determine which contract review agent should be utilized.
- The revenue recognition agent will extract a list of all products and terms.
- The details will be entered into an Excel model used by the finance team for further processing, and any missing information will be looked up in Microsoft Dynamics 365.

Systems Included in Process:
Microsoft Dynamics 365, Excel

Real-world Scenario: *Approximately 25,000 contracts need to be reviewed annually through a manual effort.*

Accounting: Financial Close

UiPath

Business Problem:
Closing the books is a lengthy and manual process. Most organization close the books and immediately start the process for the next month. Financial close solutions have yet to develop significant ROI as these processes are both paper and calculation heavy.
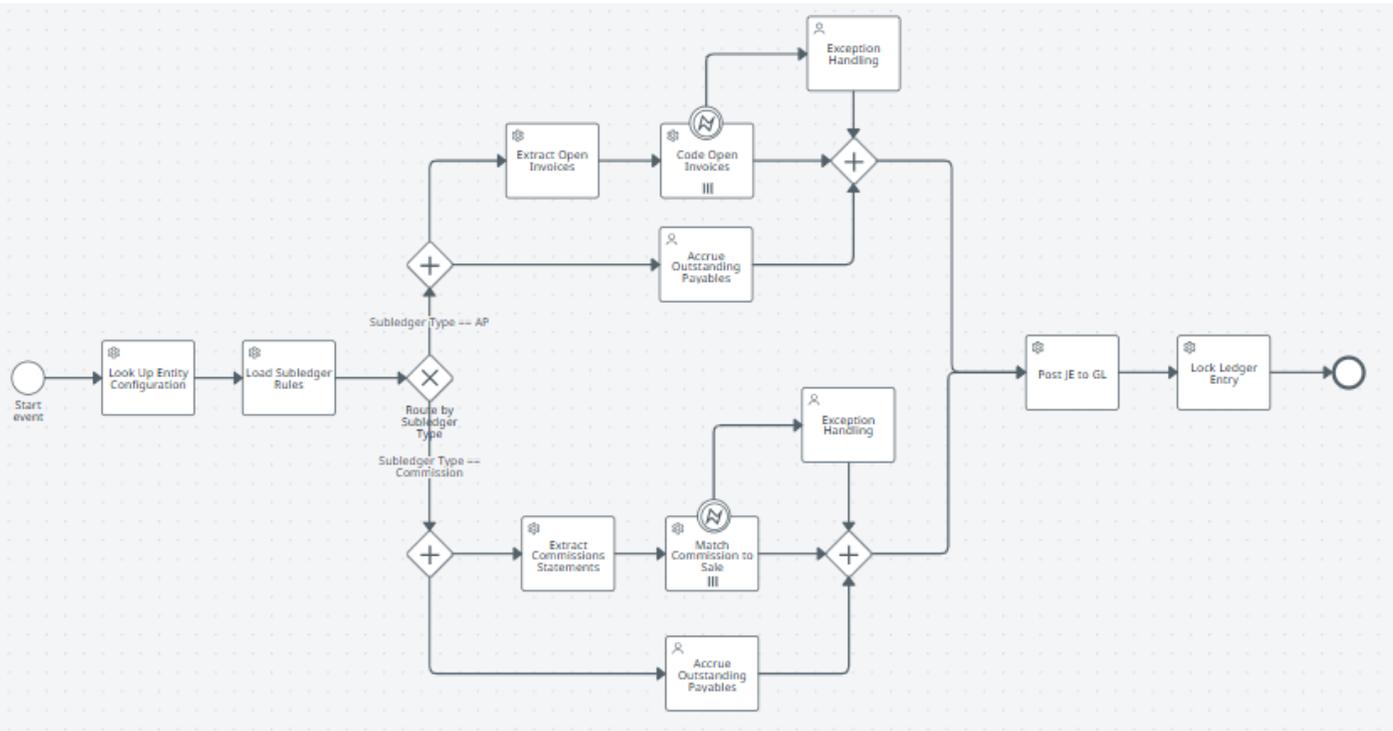
Solution:
Leveraging UiPath agentic automation, F&A teams can develop repeatable financial close workflows.

AI agents will bring automation to new heights, executing cognitive tasks such as semantically matching commission lines to sales orders and ensuring the commission is correct based on operational procedures and policies.

UiPath Maestro™ handles process intricacies as well as error handling.

Real-world Scenario: *At month-end, the system automatically ingests trial balances from multiple ERPs, triggers reconciliation across intercompany accounts, and posts recurring accruals and adjustments. This initiates a multi-system workflow involving systems like SAP and Oracle to validate balances and generate consolidated financial statements. If no exceptions are found, preliminary close reports are distributed to the controller for review.*

Systems Included in Process: SAP, Oracle, Infor, core ERP/general ledger

UiPath

Other use cases

Billing Inquiry Assistant

Industry: Public Sector (Utilities)
Domain: Customer Service (Billing Call Center)
Persona: Contact Center Agent
Benefactor: Contact Center Agent & Customer
**Delivery**: UiPath Services

UiPath

Business Problem:
A utility company's call center manages thousands of billing inquiries monthly from customers concerned about consumption changes and payment issues. Contact center representatives manually research accounts and analyze discrepancies, resulting in extended call times, inconsistent resolutions, and customer frustration. The complex billing policies create challenges for providing accurate, compliant solutions, especially during busy periods, while valuable historical data remains underutilized for improving service quality.

Solution:
UiPath implemented a solution leveraging agentic capabilities to streamline billing inquiries. The system integrates with Snowflake's customer data and policy repositories to analyze billing data, usage history, and company policies in real time. This analysis is presented to the Contact Center Agent through a custom UiPath App, providing AI-driven insights and resolution options. The system also generates targeted questions to identify root causes of higher consumption. This approach can potentially save 2–4 minutes per call, enabling faster, more consistent decision making and improving first-call resolution rates.
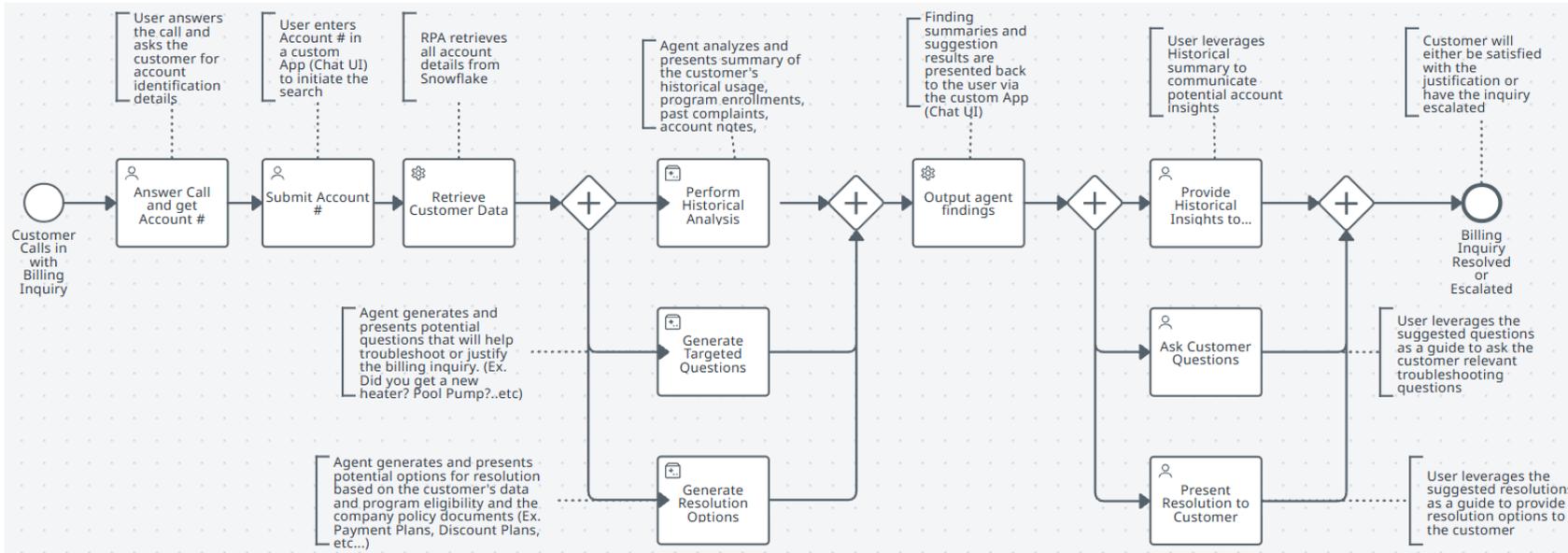
Real-world Scenario: When a customer contacts a call center with a billing question, agents use an AI-powered assistant that instantly analyzes account data, usage history, and company policies. The system identifies unusual patterns, suggests personalized solutions, and provides targeted questions for employees to ask about recent changes in usage. This intuitive tool helps agents quickly explain billing issues and offer appropriate solutions, cutting call times while improving customer satisfaction and resolution rates.

Systems & Tools: Snowflake, CSV
UiPath Capabilities: Agents, RPA, Apps

Time to Deploy: 10–12 Weeks

Organizational Chart Extractor

Industry: Professional Services
Domain: Office of Independence
Persona: Consultant/Analyst
Benefactor: Consultant/Compliance
Delivery: UiPath Services

UiPath

Agent (Image Analysis GenAI activity) analyzes chart and extracts the relevant entity data points

User receives new organizational chart

User uploads the document through a custom App form, and provides any special instructions (Layout style, items of importance/relevance ...etc)

Upload and Submit Chart Document

Extract Chart Entity Data (Model 1)

Extract Chart Entity Data (Model 2)

Extract Chart Entity Data (Model 3)

Multiple Agents can be customized/tailored to process specific chart types (as needed)

Agent reviews the output of image extraction and provides recommendations to user on next steps e.g. proofread for any extraction errors like letters swapped with numbers, spacing. conflicting information, basic validations

Analyze and Review Extracted Data

RPA outputs data and agent summaries to Excel spreadsheet

Create Excel File Output of Entity Data

User downloads Excel Output file from the custom App form

Download and Save Excel Output

User reviews extraction and completes missing information

Real-world Scenario: *When a chart document is received, an analyst uploads it to the intelligent processing system. Using OCR and AI technologies, the automation extracts key information such as entity details, relationships, and critical data points regardless of format complexity. The system standardizes this information into a structured template, allowing analysts to quickly review results through a visual interface, reducing processing time from hours to minutes while maintaining compliance standards.*
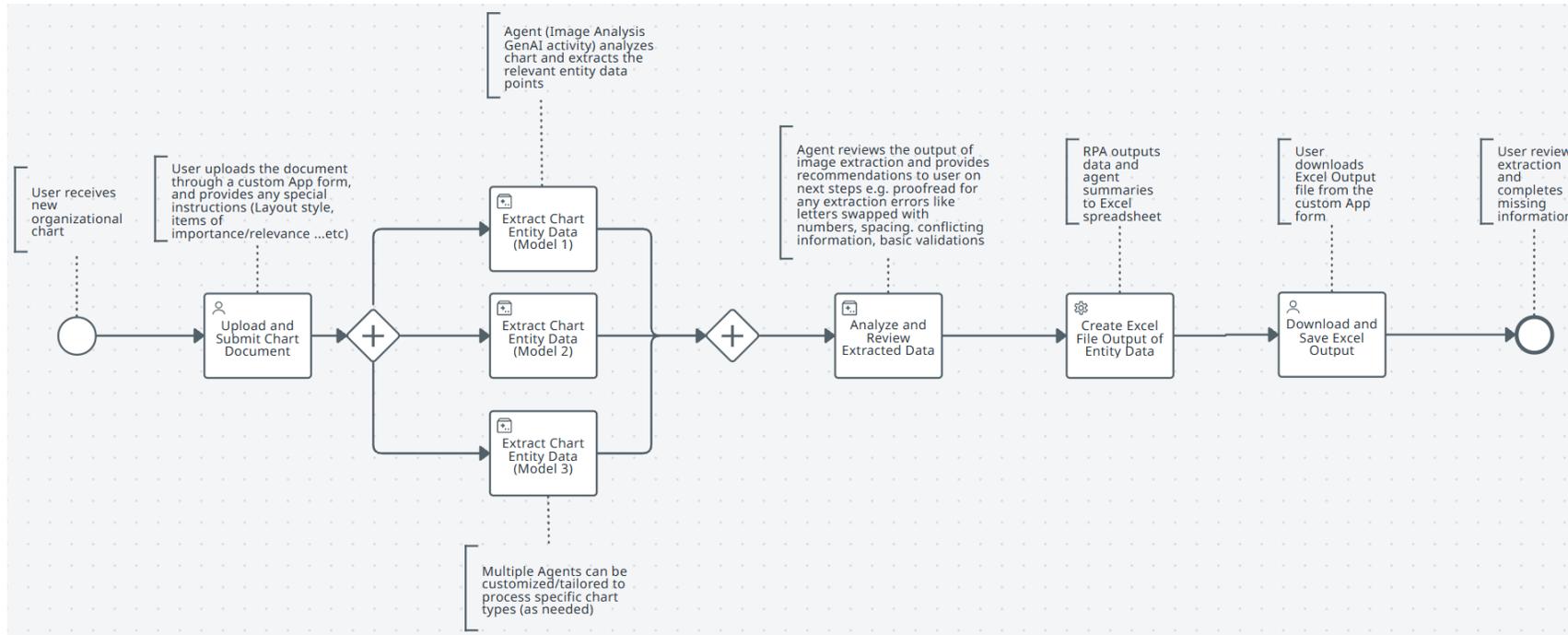
Business Problem:
The Office of Independence processes 5–10 organizational charts weekly, each containing 20–500+ entities. With 3,500+ clients requiring chart reviews and 500,000+ legal entities to be logged, this manual process consumes 25,000 labor hours annually. Challenges include varied file formats (PDF, Excel), layouts (Top Down, Left to Right), and digital formats across multiple pages/tabs. This diversity and tedious task impacts efficiency and accuracy, causing compliance risk and delays in availability of the data in their system.

Solution:
UiPath implemented a solution leveraging RPA and agentic capabilities that automates the extraction of data from diverse organizational chart formats, including PDF, Excel, PowerPoint, and Word files. Using advanced OCR and AI technologies, it accurately identifies and extracts key information such as legal entity names, locations, ownership percentages, and parent-child relationships. The extracted data is then standardized and populated into a structured Excel format, significantly reducing manual effort and improving accuracy.

Systems & Tools: Microsoft Excel
UiPath Capabilities: Agents, Apps, RPA

Time to Deploy: 10–12 Weeks

Utility Invoice Processing

Industry: Public Sector (Utilities)
Domain: Finance & Accounting
Persona: Accounts Payable Associate
Benefactor: Accounts Payable Associate
Delivery: UiPath Services

UiPath

Process Flow

- User drops invoice files in a shared folder → **Start**
- RPA retrieves PDF files from shared folder → **Retrieve PDF Invoices**
- Document Understanding classifies document as invoice and extracts 6 data points from the document → **Extract Invoice Data**
- **Validation Needed?**
  - Yes → User validates classification and extraction fields in Action Center → **Human Validation**
  - No →
- RPA validates, cleans and formats extracted data → **Validate and Format Data**
- RPA outputs data to CSV and saves the file in dedicated output shared folder → **Output to CSV**
- CSV File available for Accounts Payable processing → **End Process**

Real-world Scenario: When an organization receives invoices from various vendors, an intelligent document processing system automatically extracts key information from diverse formats including PDFs, emails, and scanned physical documents. Using advanced OCR and AI technologies, the system validates the extracted data against vendor records and seamlessly integrates with existing accounts payable workflows.

Business Problem:
A federal agency receives roughly 219,000 invoices from 3,000 different vendors for utilities, service contracts, and equipment. Of these invoices, 87,000 are for utilities and are typically received as PDFs via email, file share, or physical mail, which are scanned into PDF files and manually transcribed into a database queue for further use and processing by accounts payable teams. This process is manual, time consuming, unscalable, and error-prone.
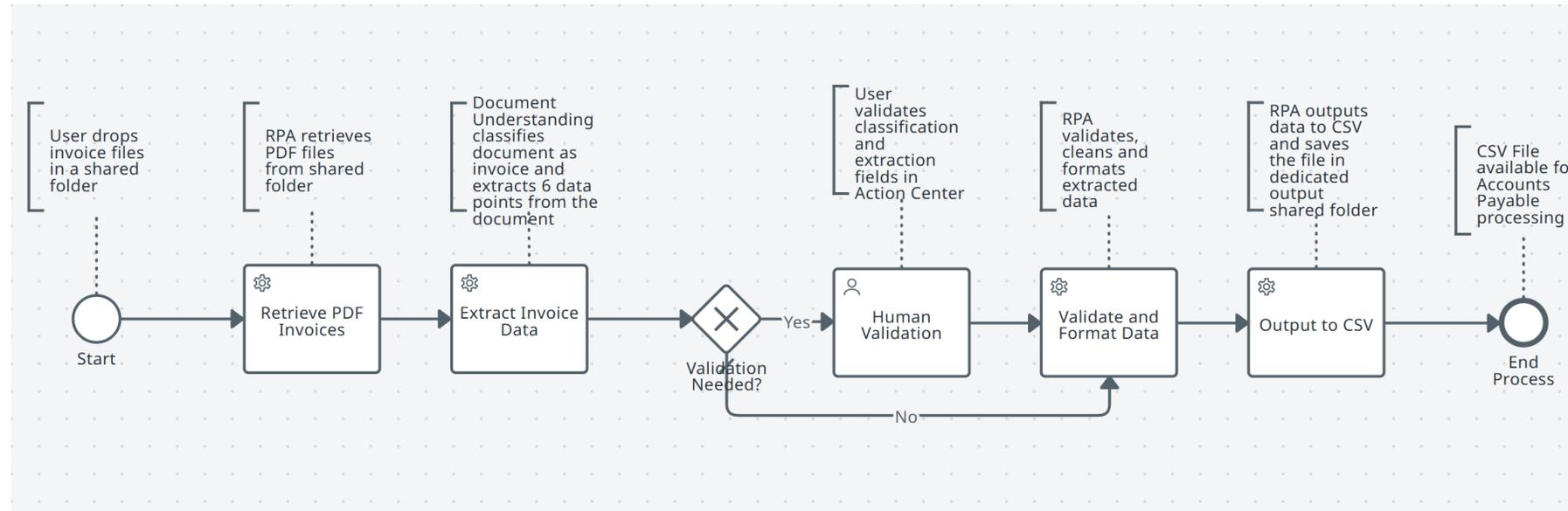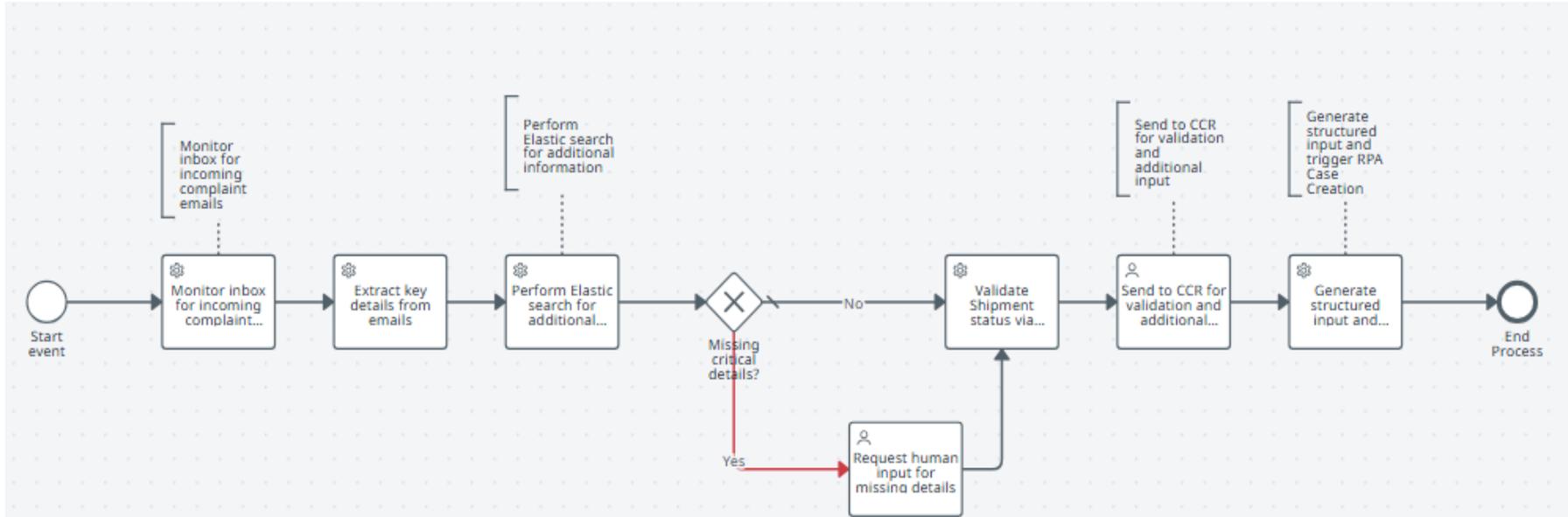
Solution:
UiPath developed and deployed a machine-learning-enabled automation solution that automatically retrieves the PDF invoices from a dedicated shared folder, extracts six data points using UiPath Document Understanding™, and (when necessary), presents the extracted data alongside the original documents for human-in-the-loop validation. The solution then validates and reformats the data before outputting it to a CSV file for further processing by accounts payable teams.

Systems & Tools: Shared folder, CSV fjiles
UiPath Capabilities: Document Understanding, RPA
Time to Deploy: 8–9 Weeks

Customer Complaints Agent

Industry: Life Sciences
Domain: Customer Service
Persona: Benefits Manager
Benefactor: Benefit Manager
Delivery: UiPath Services

UiPath

Real-world Scenario: *A customer care team struggled with manually processing email complaints requiring classification into multiple case types across different systems. The UiPath agentic AI + RPA solution automatically captures complaint details, extracts context, performs validations, and only involves humans for exceptions. The AI sends structured data to RPA workflows for direct case creation in the ERP system, reducing processing time by 65%. This transformation improves accuracy while allowing representatives to focus on resolving rather than processing issues.*

Business Problem:
A customer care team handles a high volume of complaints through unstructured emails, each requiring manual classification into over 10 possible case types. The reps have to interpret unstructured inputs, cross-reference multiple systems like FedEx and enterprise resource planning (ERP) tools, and validate the complaint's eligibility for case creation. This consumes a lot of subject matter experts' (SMEs) time, relying heavily on historic knowledge, and is difficult to scale.

Solution:
UiPath deployed an agentic + RPA solution where an AI agent captures complaint details via emails. The agent extracts context, interprets scenario types, performs validations, involves a human-in-the-loop to get missing information, and flags edge cases for manual review when needed.

Once the information is validated, the AI agent sends the structured input to an RPA workflow which triggers case creation in an ERP tool.
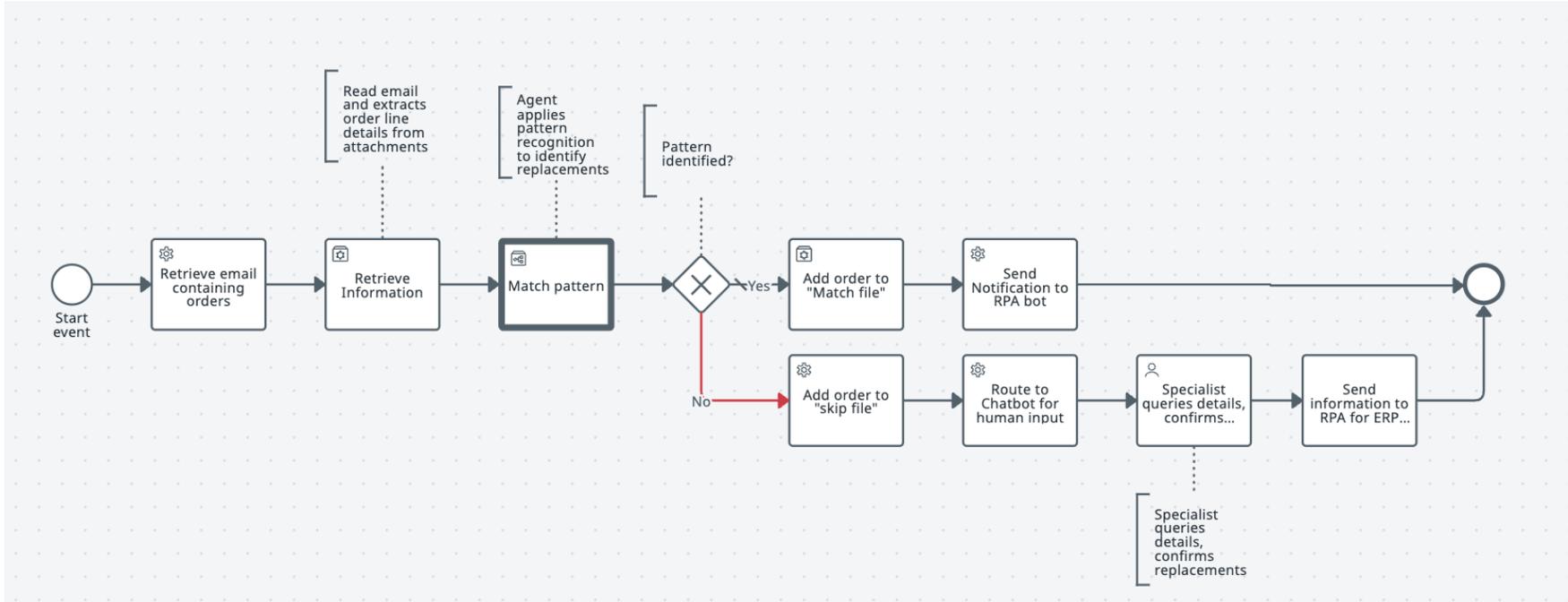
Systems & Tools: Outlook, ERP tools
UiPath Capabilities: Agents, RPA workflows, Apps

Time to Deploy: 13–15 Weeks

Warranty Claims Classification

Industry: Life Sciences
Domain: Customer Service
Persona: Benefits Manager
Benefactor: Benefit Manager
Delivery: UiPath Services

UiPath

Real-world Scenario: *A customer service team faced challenges handling large volumes of warranty claims due to manual review and inconsistent documentation, leading to delays and dissatisfaction. UiPath deployed an intelligent automation that reads attachments, extracts order details, and applies advanced pattern recognition to match replacements accurately. The system generates structured data and updates the ERP for precise tracking. This solution saved over 2,000 hours annually, boosted accuracy to 99.5%, and enabled staff to focus on more complex customer needs.*

Business Problem:
The customer service team processed high volumes of warranty claims with complex replacement scenarios. These required non-deterministic logic to resolve and respond to. Manual handling caused delays and incorrect warranty extension periods, resulting in increased costs, inconsistencies, and backlogs.

Solution:
A UiPath Agent now automates the warranty claim process end to end. The AI agent reads email attachments and extracts order line details despite errors or formatting issues. The solution uses pattern recognition to match replacements, even with spelling or file name inconsistencies.

It outputs a clean, structured file, sends information to a robot to update Baan ERP for accurate warranty tracking. If the automation can't determine the replacement, the chatbot enables specialists to retrieve detailed order and line-item data from the database, confirm matches, and send structured instructions back to the automation.
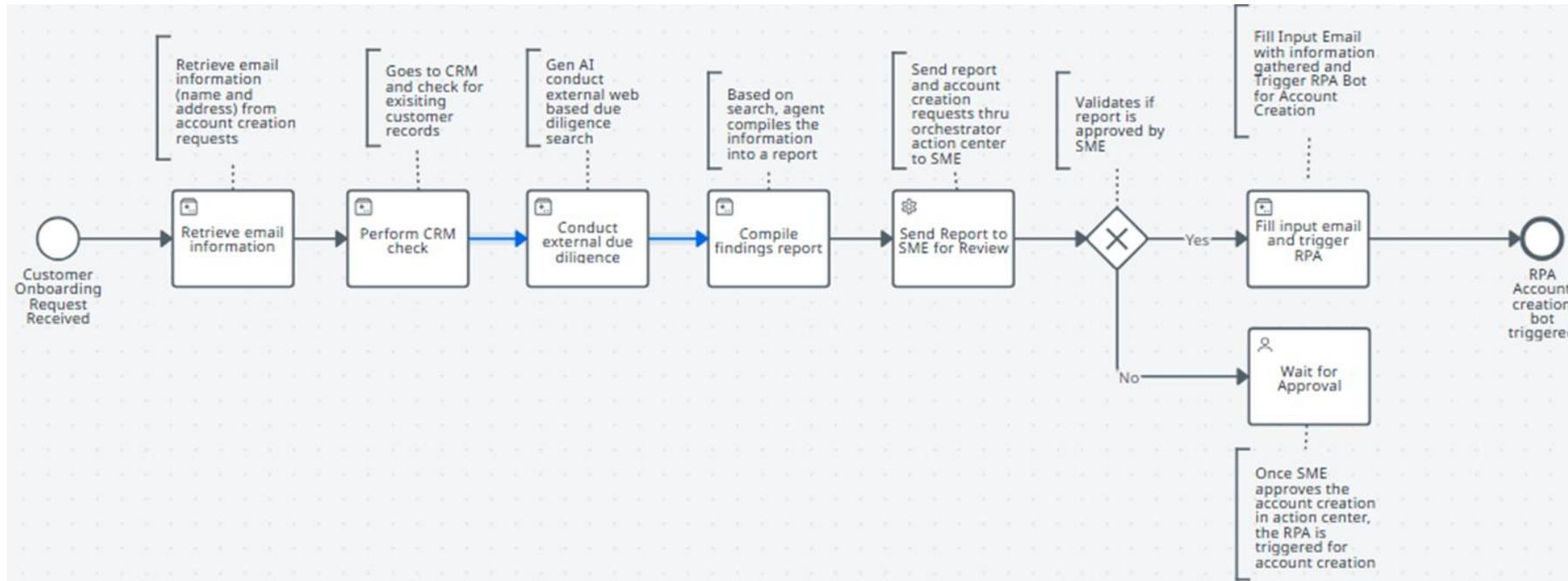
Systems & Tools: Outlook, Excel, and Baan ERP
UiPath Capabilities: Maestro, Agents, RPA

Time to Deploy: 11 Weeks

Customer Due Diligence Assistant

Industry: Life Sciences
Domain: Customer Service
Persona: Customer Service reps
Benefactor: Execs, and CS reps
Delivery: UiPath Services

UiPath

Retrieve email information (name and address) from account creation requests — Retrieve email information

Goes to CRM and check for exisiting customer records — Perform CRM check

Gen AI conduct external web based due diligence search — Conduct external due diligence

Based on search, agent compiles the information into a report — Compile findings report

Send report and account creation requests thru orchestrator action center to SME — Send Report to SME for Review

Validates if report is approved by SME

Fill Input Email with information gathered and Trigger RPA Bot for Account Creation — Fill input email and trigger RPA

Customer Onboarding Request Received → Retrieve email information → Perform CRM check → Conduct external due diligence → Compile findings report → Send Report to SME for Review → (Validates) → Yes → Fill input email and trigger RPA → RPA Account creation bot triggered

No → Wait for Approval

Once SME approves the account creation in action center, the RPA is triggered for account creation

Business Problem:
The customer teams manually review new customer setup requests. Due diligence is required for researching business websites, addresses, and product types. Reps spend time validating whether companies are resellers or if they match compliance rules.

The manual process is time consuming, error-prone, delays onboarding.

Solution:
The UiPath Solution deploys an agent to scan emails for new account creation requests. It extracts company data and performs web-based research using GenAI.

Results are compiled and shared with users for decision making. Once approved, the AI agent triggers an account creation workflow via email.

Real-world Scenario: Customer onboarding was slowed by manual research and compliance checks, creating backlogs and delaying revenue. UiPath introduced an intelligent automation that scans incoming requests, gathers company data, and uses GenAI to verify legitimacy and compliance. It generates structured reports for quick review and automates account setup upon approval. This streamlined process cut handling time by 77%, cleared backlogs, and improved accuracy—freeing up specialists to focus on more complex tasks.

Systems & Tools: Outlook, web browser, CRM platform
UiPath Capabilities: Action Center, Agents, RPA

Time to Deploy: 11 Weeks

Cash Application Automation

Industry: N/A
Domain: Finance
Persona: Accounts Receivable Team
Benefactor: Execs, A/R Team, Customers
Delivery: UiPath Services

UiPath

Business Problem:
The manual cash application process has a high volume of incoming payments and remittances, requiring manual matching to invoices. The staff spends hours reconciling each transaction, leading to bottlenecks and delays. And the manual data entry is prone to human error, leading to incorrect postings or misapplied cash.

Solution:
Streamline the daily cash application process by automating reconciliation across systems while ensuring accuracy, compliance, and auditability.
- Use UiPath RPA to automate data collection, validation, and ledger updates.
- Leverage an agentic AI model to extract and interpret unstructured remittance data.
- Automate end-to-end reconciliation with minimal human intervention.

Real-world Scenario: A wholesale electronics distributor receives hundreds of payments daily from retail partners, each accompanied by remittances referencing multiple invoices. The accounts receivable team spends significant time manually matching payments to invoices, often leading to delays, misapplied cash, and human errors. This causes bottlenecks in processing, inaccurate postings, and poor cash flow visibility, affecting both customer satisfaction and financial forecasting.

Systems & Tools: SAP, Excel, PDFs, Outlook, customer portals, bank statements
UiPath Capabilities: Agents, Assistant

Time to Deploy: 10 Weeks

Financial Health Assessment

Industry: Pharma
Domain: Commercial Finance
Persona: Leadership Team, Finance Execs
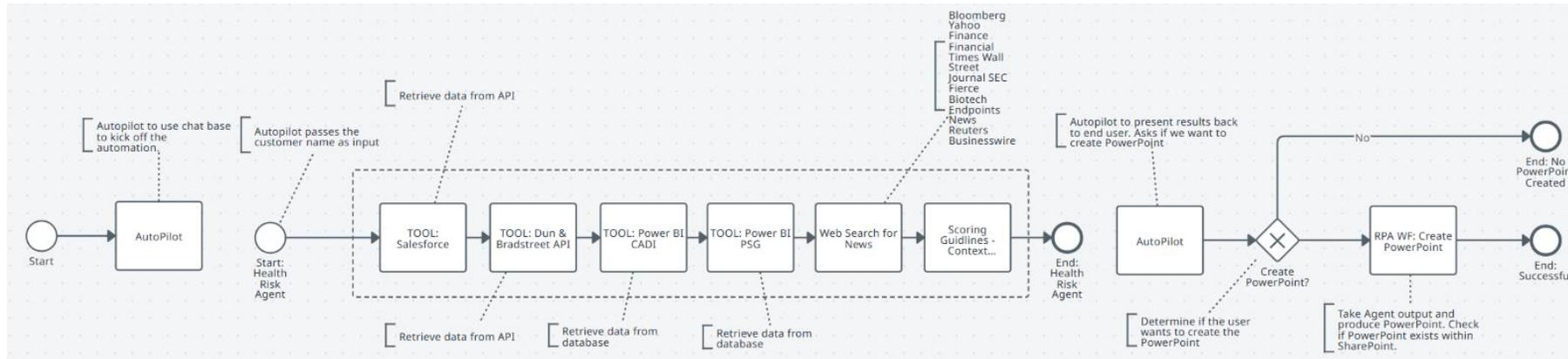**Benefactor**: Executives, Customers
Delivery: UiPath Services

UiPath

Real-world Scenario: *A provider of services to biotech companies, struggles to assess the financial stability of new clients during the onboarding process. Without an automated risk assessment tool, the company relies on manual methods to evaluate financial health, which leaves room for errors and inconsistencies. As a result, leadership faces challenges in making data-driven decisions, putting the business at risk of forming partnerships with financially unstable clients. This lack of a standardized framework undermines effective risk management and strategic planning, satisfaction, and financial forecasting.*

Business Problem:
The company faces a challenge in effectively assessing the financial health of new customers. Without an automated, comprehensive financial risk assessment framework, the company is exposed to potential financial risks and uncertainty in its customer onboarding and partnership decisions. This lack of a standardized approach hinders the leadership team's ability to make informed, data-driven choices, impacting overall risk management and strategic planning for customer engagements.

Solution:
Conduct a comprehensive financial risk assessment for new customers automatically and more efficiently reducing manual efforts. This financial assessment will involve evaluating various aspects of the new customers, including company overview, partnership overview, company financials, and sector exposures and presented in a PowerPoint format.

Systems & Tools: Salesforce, Dun & Bradstreet, Power BI, Google
UiPath Capabilities:
Autopilot for Everyone, UiPath Autopilot for Assistant

Time to Deploy: 11 Weeks

Lease Data Extraction

UiPath

Start event → **Input files** (Input Files added to share drive path (Leases)) → **Get leases documents** → **Process the field with DU process** (Process the field prompt (Gen AI) with DU process) → **Extract data** (Extract data from the field prompt (40 fields)) → **Validate extracted data** (Validate extracted data from the fields (Action Center user validation)) → **Validation Check** — Not Valid → **Process manually** → **Process Complete**

Validation Check — Valid → **Export and insert data results** (Export and insert data results in SQL tables) → **Process Complete**

Business Problem:
A regional lease administration team must review various property leases to validate the information they contain. This involves extracting more than 40 key pieces of data for use in another system. They often work with documents over 60 pages long to locate the required information. This time consuming, repetitive task is performed daily and has become a significant challenge due to its impact on productivity and efficiency.

Solution:
An organization providing expert services in tax management and leasing implemented a UiPath unattended robot to streamline the lease information extraction process. Using UiPath Document Understanding™ and GenAI, the bot cut extraction time from 8 to 4 hours. This solution processes all daily property leases and accurately extracts all 40 required information fields from documents.
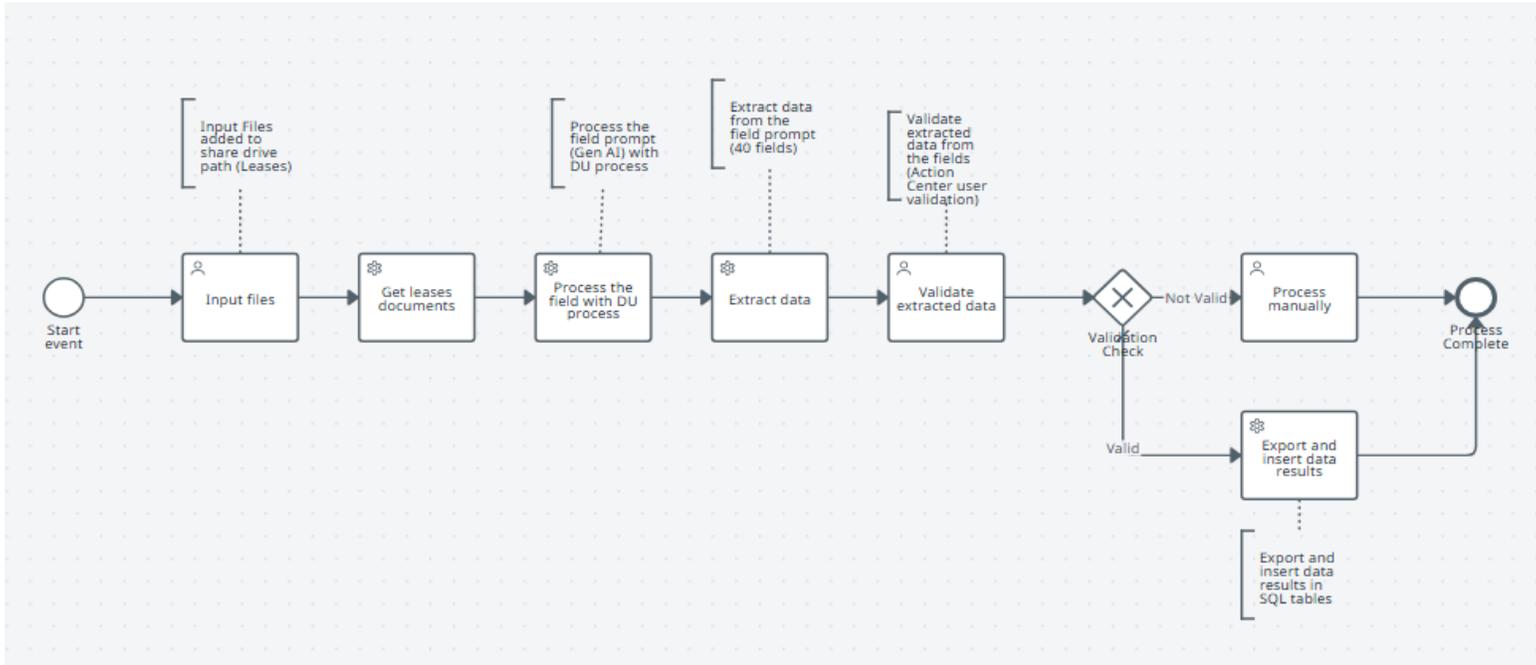
Real-world Scenario: A lease administration manager must process 15 commercial leases before a next-day client meeting. Instead of manually reviewing lengthy documents, she uses unattended automation with Document Understanding and GenAI. The system extracts key data, flags unusual terms, and generates a financial summary. At the meeting, she presents clear insights that strengthen client relationships and highlight a technology-driven approach.

Systems & Tools: CRM, PDF, SQL Database
UiPath Capabilities: Communications mining, document understanding, RPA

Time to Deploy: 14-16 Weeks

Contact Center Mail Management: Intent Classification

Industry: *Finance*
Domain: *Customer Service (Contact Center)*
Persona: *Intent Classification Agent*
Benefactor: *Consumers, Contact Center agents*
Delivery: *UiPath Services*

UiPath
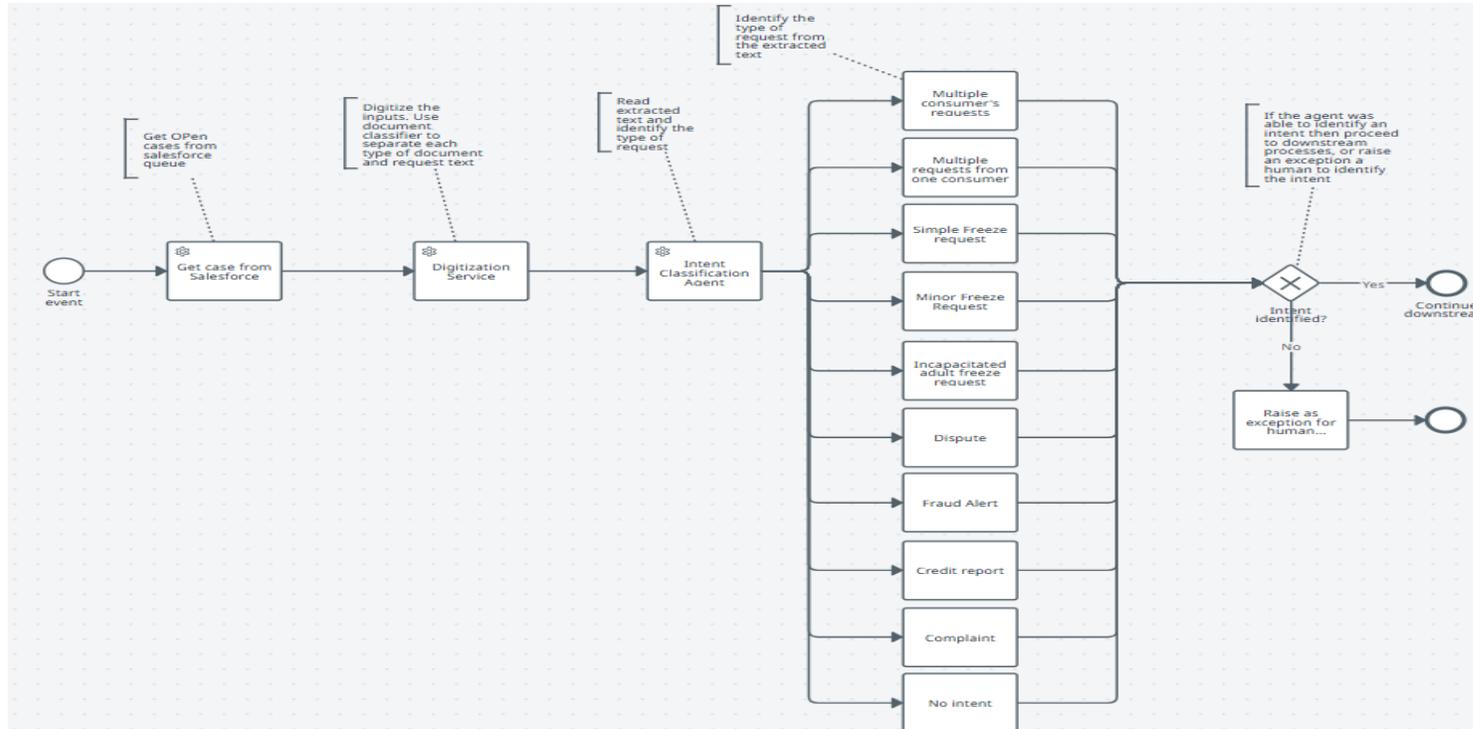
Business Problem:
Contact centers are entirely staffed by human agents with limited interactive voice response (IVR) options. Quality controls are manual, use limited sampling, and are designed to detect errors after they occur.
- 87% overall satisfaction with agents. External events can create volume swings that stress the goal of answering 80% of calls within 30 seconds.

Entire contact center metrics:
- 2,000+ FTEs/contractors
- $57 million operating cost
- 36 million requests: 7.8 million manually worked by human agents

Solution:
The goal is to have contact center traffic, received through email, handled primarily by AI agents with human agents available for escalations. Quality controls are automated, continuous, and designed to prevent errors. Automation helps drive CSAT to 90+% overall satisfaction. External events no longer present an issue for the AI agent-led contact center.

Measure pilot performance vs. baseline to assess performance. Based on pilot results, determine strategy to automate the entire contact center.

Systems & Tools: Salesforce
UiPath Capabilities: Agent, RPA robots, external app integration, tools usage, context grounding
Time to Deploy: 4 weeks (PoC)

Real-world Scenario:

Insurance: *companies handle millions of mail items related to claims and policy changes. AI agents classify claim types, extract data, and initiate workflows.*
Banking: *banks receive millions of mail items about loans, credit cards, and account issues. AI agents classify intents and trigger automated workflows.*

Contact Center Mail Management: Consumer Authentication

Industry: Finance
Domain: Customer Service (Contact Center)
Persona: Secure Verifier Agents
Benefactor: Consumers, Contact Center agents
Delivery: UiPath Services

Business Problem:
Contact centers rely heavily on human agents to manually authenticate consumers through mail-based or other interactions.
This involves:
- Searching for consumer records using identifiers like a Social Security number (SSN).
- Manually validating attached documents against business rules.
- Comparing PII data with credit files.

There's a high risk of errors and delays. And external volume spikes strain SLAs and increase costs.

Solution:
The **Authentication AI Agent**:
- Identifies consumer records using SSN or other identifiers.
- Validates attached documents using rule-based and AI-powered checks.
- Matches PII data from documents with credit file data to determine authentication status.
- Reduces manual workload, improves accuracy, and enhances fraud detection.
- Requires human agents only for escalations or edge cases.
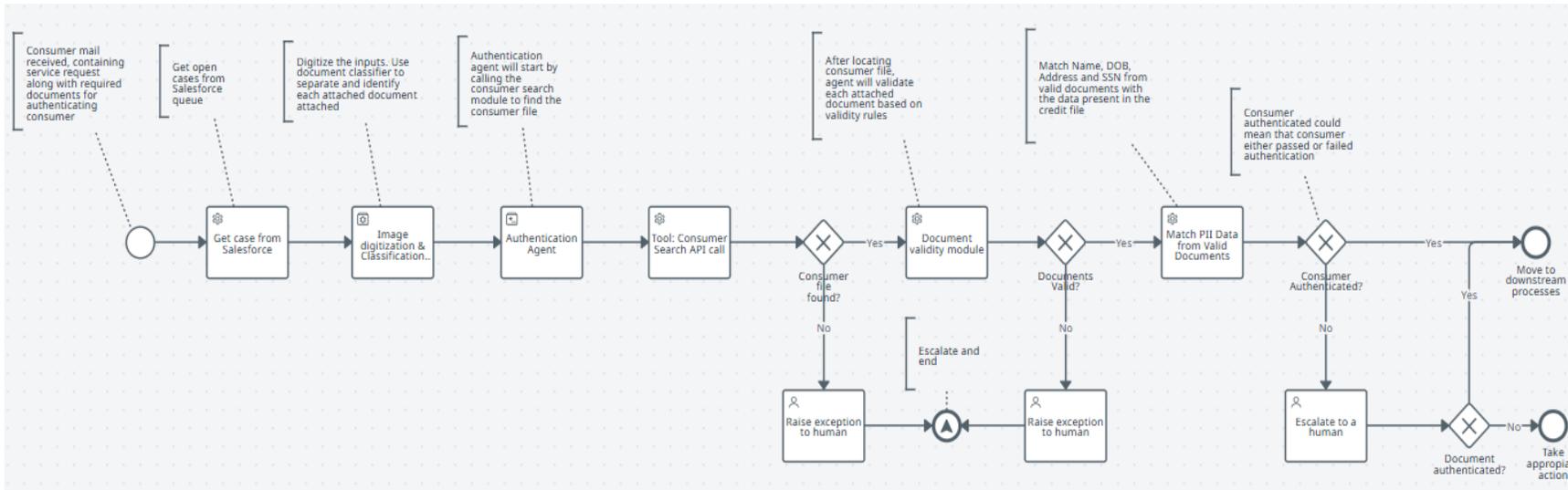
Real-world Scenario:
Banking: Automates identity verification for loan applications, credit disputes, and account access requests using consumer documents and credit file matching.
Insurance: Validates policyholder identity during claims processing by matching submitted documents with internal records.

Systems & Tools: Salesforce
UiPath Capabilities: Agent, RPA, external app integration, context grounding

Time to Deploy: 7 weeks (PoC)

Contact Center Mail Management: Quality Check
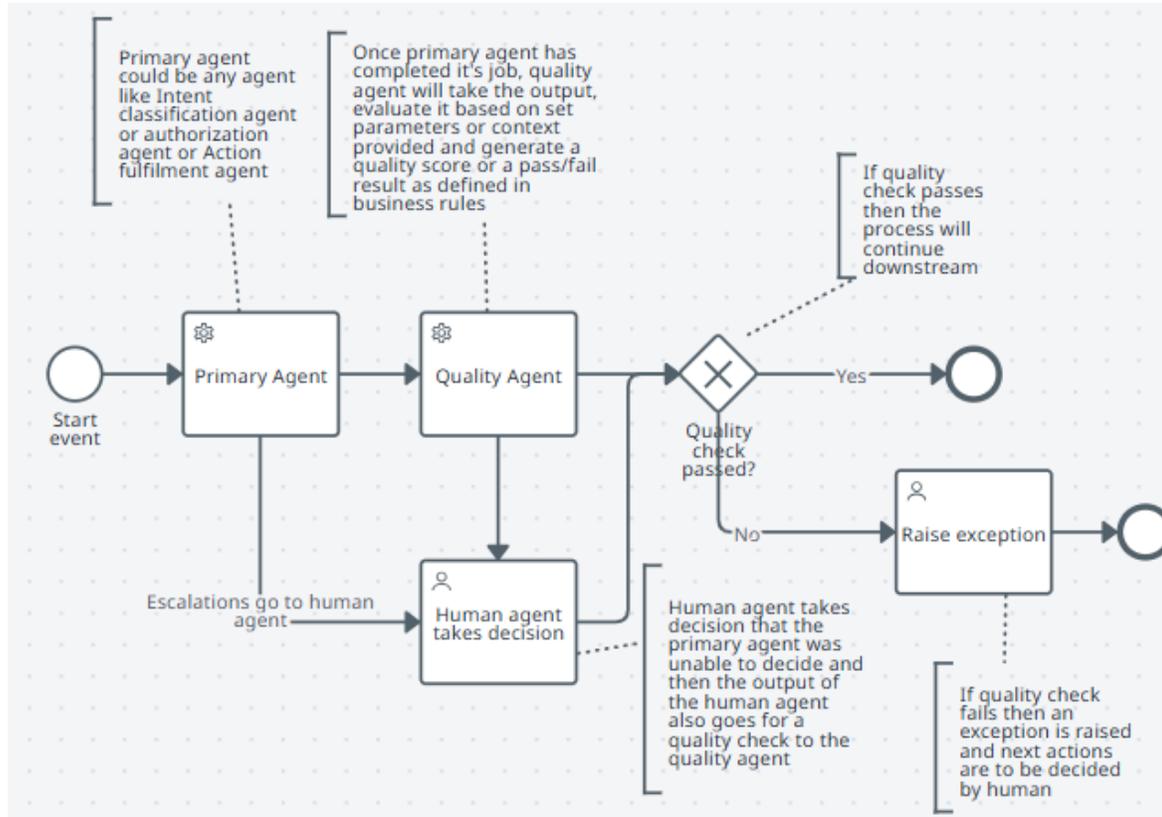
Industry: Finance
Domain: Customer Service (Contact Center)
Persona: Evaluator
Benefactor: Consumers, Contact Center agents
Delivery: UiPath Services

Primary agent could be any agent like Intent classification agent or authorization agent or Action fulfilment agent

Once primary agent has completed it's job, quality agent will take the output, evaluate it based on set parameters or context provided and generate a quality score or a pass/fail result as defined in business rules

If quality check passes then the process will continue downstream

Start event

Primary Agent

Quality Agent

Quality check passed?

Yes

No

Escalations go to human agent

Human agent takes decision

Raise exception

Human agent takes decision that the primary agent was unable to decide and then the output of the human agent also goes for a quality check to the quality agent

If quality check fails then an exception is raised and next actions are to be decided by human

Business Problem:
- Contact centers are entirely staffed by human agents.
- Quality controls are manual and use limited sampling designed only to detect errors after they occur.
- All of which results in a high risk of errors and delays.

Solution:
- Automating real time quality controls, designed to prevent errors.
- The solution reduces manual workload, improving accuracy and quality.
- An AI agent only involves human agents for escalations or edge cases.

Real-world Scenario:
Healthcare: Patient support centers
AI agents handle patient queries and identity verification ensures compliance, accuracy, and safe routing.
Retail: Customer service automation
Evaluates how well AI agents classify customer intents (returns, complaints) and authenticate users before initiating actions.

Systems & Tools: Salesforce
UiPath Capabilities: Agent, RPA, context grounding

Time to Deploy: 7 weeks (PoC)

UiPath

# Contact Center Mail Management: Action Fulfillment (Freeze) Agent

Business Problem:
Manual action fulfillment for consumer requests—such as freeze-related requests received via physical mail—require agents to take actions manually (such as adding, removing, or lifting a freeze). These tasks consume significant time, delay response times, and increase operational costs, making these tasks ideal candidates for automation.

Solution:
UiPath is automating the fulfillment of freeze-related actions using agents and robots to reduce manual effort and improve speed and accuracy.

This pilot will serve as a foundation for expanding automation to other request types in future phases.
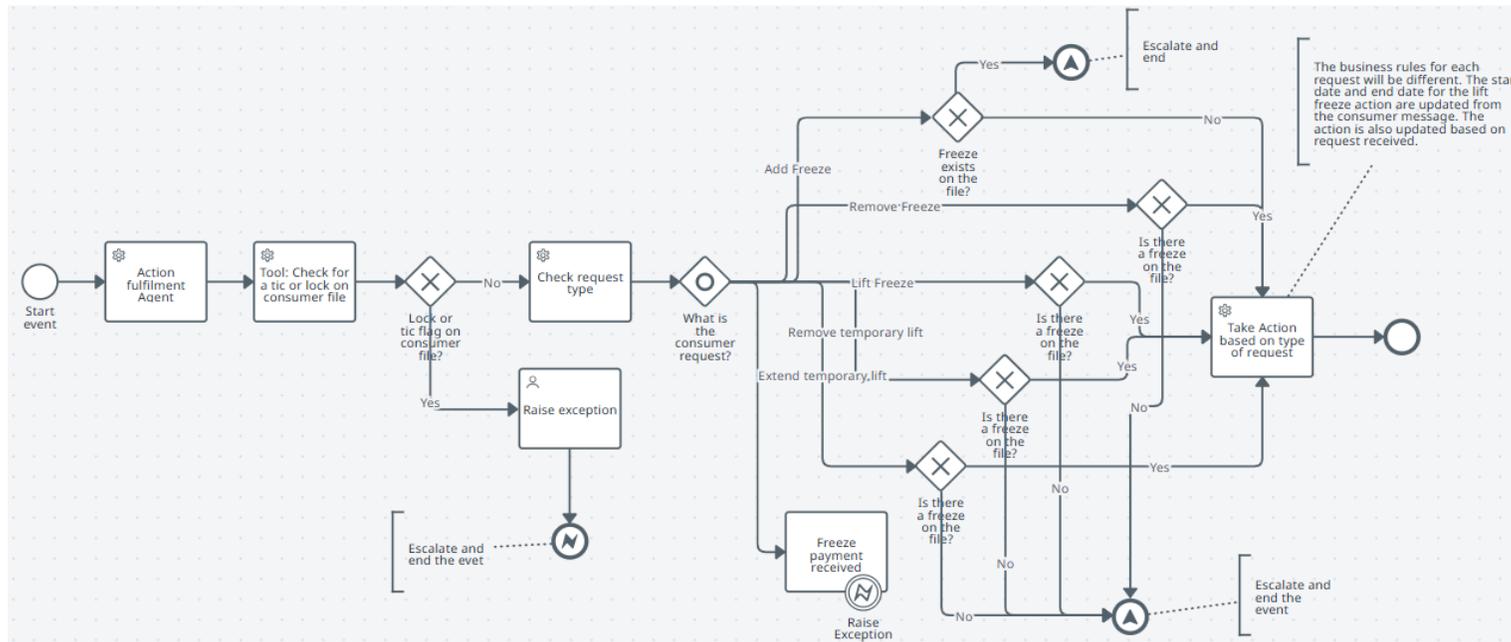
Real-world Scenario:
Banking: a customer emails to update their address. AI classifies the intent, authenticates the user, and updates the record—no human needed unless flagged.
Retail: a buyer requests a refund via email. AI identifies the intent, verifies the purchase, and initiates the refund, escalating only if policy exceptions apply.

Systems & Tools: Salesforce
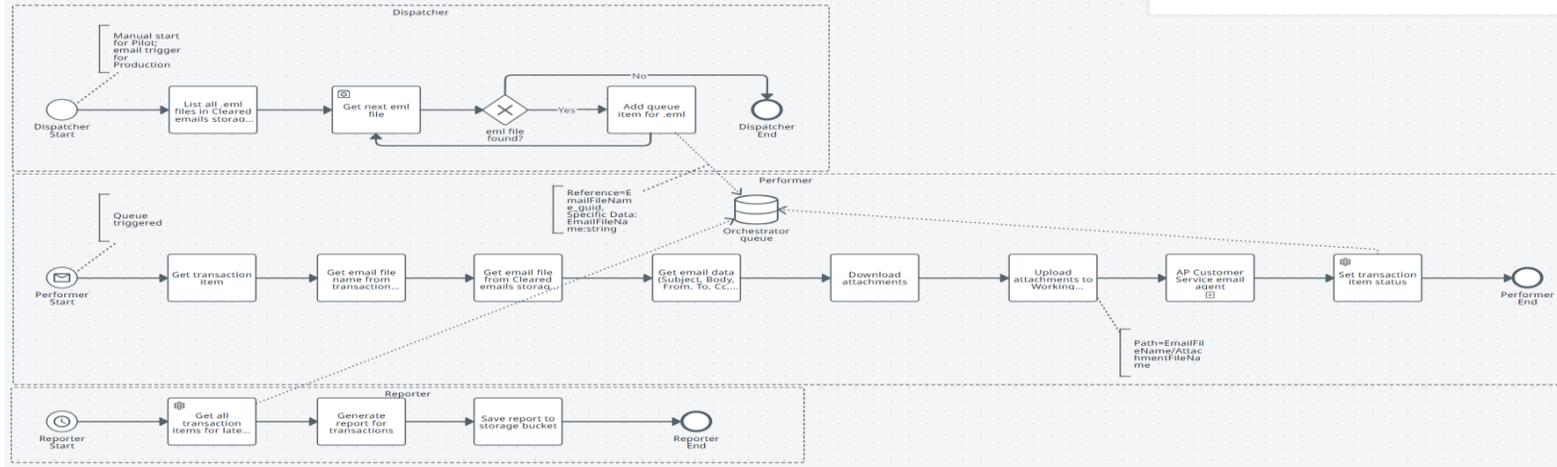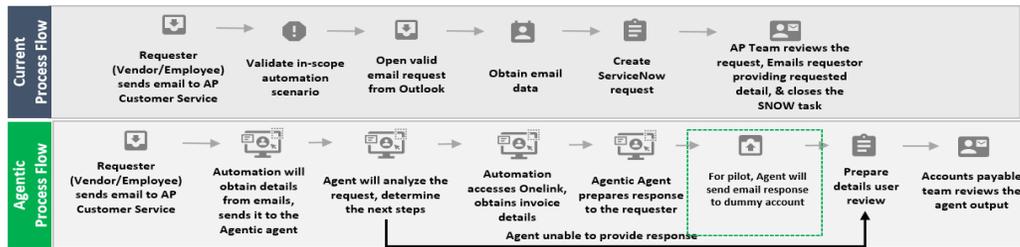UiPath Capabilities: Agent, RPA, context grounding

Time to Deploy: 7 weeks (POC)

AP Customer Service Email Response

Industry: Healthcare
Domain: F&A
Persona: Customer Service Agent
Benefactor: Accounts payable team, vendors
Delivery: UiPath Services

UiPath

High-level process overview

Real-world Scenario: *The AP team's productivity previously declined as they spent excessive time addressing vendor inquiries, resulting in strained relationships due to delayed or insufficient responses. However, with the introduction of a UiPath Agent and automation handling 60-70% of requests, vendors now receive faster, more efficient resolutions, allowing the AP team to focus on high-priority tasks that require their expertise and immediate attention.*

Business Problem:
AP Customer Service Mailbox receives a daily average of 600-800 emails, all of which require the team's attention. They currently utilizes automation to sort this influx of data and create tasks in ServiceNow for users to review. However, this response management process, unchanged for over a decade, remains entirely manual. Significant effort required to support the process and longer response time is common due to large volume.

Solution:
As part of an agentic AI pilot, UiPath implemented solution to leverage RPA and agentic capability. The solution:
- Accesses emails and retrieves key metadata
- Analyzes details to determine request intent and resolution requirements
- Pulls invoice information from the database (status, amount, payment details, etc.)
- If all required information is available, the agent responds with the appropriate details (or creates a SNOW ticket for the AP team).

Systems & Tools: OneLink, ServiceNow
UiPath Capabilities: Agent, unattended robot

Time to Deploy: 14 weeks

Plasma Donor Screening

UiPath

Business Problem:
After the registration and screening phases for a plasma donor are concluded, medical staff associates (MSAs) proceed to assess the donor for acceptance or deferral for donation. During this assessment, the MSAs meticulously review multiple standard operating procedures (SOPs) to ensure adherence to established protocols. Moreover, they may seek input from medical operations team to enhance their understanding.

Solution:
UiPath Autopilot(TM) provides a powerful set of AI-powered experiences across the UiPath Platform(TM). MSAs can engage in natural language conversations with Autopilot and Autopilot leverages the organization's enterprise content such as SOP documents to deliver accurate, context-based answers. Autopilot not only responds to questions but also provides direct references and relevant sections from the underlying SOPs. This transparency ensures trust while streamlining the decision-making process. By reducing manual lookups and SOP navigation, the solution improves efficiency, accuracy, and productivity.
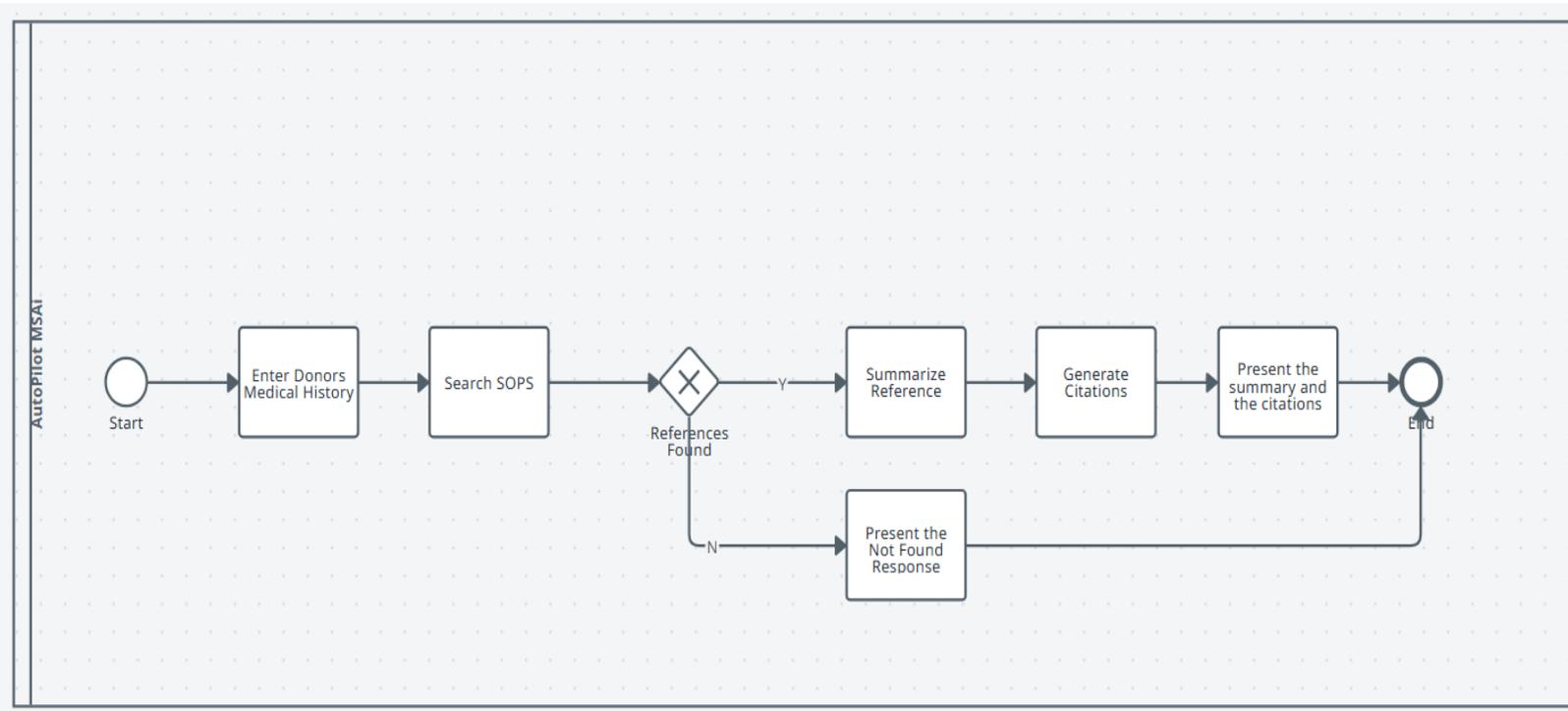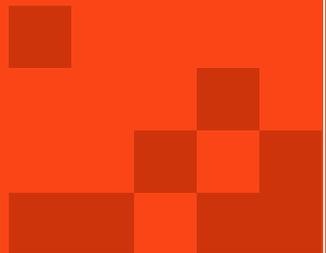
Systems & Tools: SOP documents in PDF format
UiPath Capabilities: UiPath Assistant, Autopilot, context grounding, Agent Builder in Studio

Pilot preparation to Deployment: 20-24 weeks

Why UiPath is different

Why choose UiPath for agentic automation?

UiPath

Orchestration at the core

Most vendors talk about agents as standalone tools. UiPath provides orchestration across AI agents, robots, and people, ensuring they work together seamlessly in complex financial workflows.

Breadth of validated use cases

From consumer lending to capital markets, UiPath has validated examples across the full financial services lifecycle. These are not hypothetical scenarios—they are proofs of value in real institutions.

Enterprise-grade trust

With compliance, governance, and security built in, UiPath ensures that agentic automation isn't just powerful, but also safe, auditable, and enterprise-ready.

Conclusion

The gap between hype and reality in agentic AI is wide. While many vendors are just talking, UiPath is delivering. With UiPath Maestro™, organizations can orchestrate intelligent agents, robots, and people into seamless, compliant, and high-value workflows.

For banks and insurers, this is more than automation. It's a blueprint for resilient growth, efficiency, and competitive advantage in the years ahead.

Learn more about UiPath in financial services on our UiPath.com industry pages:
- Banking
- Insurance

Contact our industry experts to dive deeper:

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