

## CASE STUDY

# BOND BROKERAGE

## INDUSTRY:

Financial Services

## PROJECT BACKGROUND:

A financial services provider needed to find a more efficient way to monitor their bonds portfolio trading in order to submit more competitive and timely bids for a higher return of investment.

## CHALLENGES:

- Highly manual bond monitoring and bidding process
- Lack of resource capacity for competitive bidding process and incentives to end-customers to re-activate their insurance coverage

## SOLUTION:

Our RPA solution architects helped customer deploy solutions that provided:

- Bots that would consistently monitor the value of the bonds and place bids to secure the bond placement within set limits
- 3-4 compliance bots and operational bots were able to submit 2000 bids daily vs 7 FTEs that dealt with less than 100 bonds each, totaling 600 bonds daily

## RESULTS:

- Higher bond investment return
- Manual labor reduction
- Higher employee satisfaction by having bots helping them make more accurate decisions in shorter timeframes, maximizing their KPIs while reducing workload

