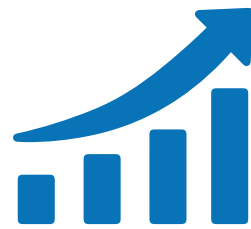**4 Steps**

For

# Automation Success
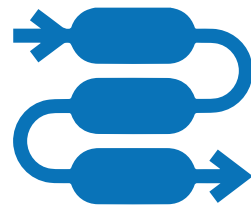
in financial services.



**Swipe Right** →

**Define the desired business outcome**

1

- ✓ New way of working
- ✓ New operations
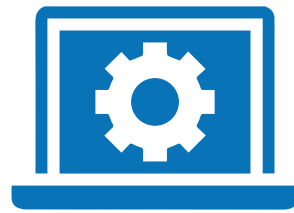- ✓ Increased engagement
- ✓ New services
- ✓ New business

## Redesign the Process

2

- ✓ Enhance
- ✓ Convert
- ✓ Eliminate
- ✓ Hide

# Profinch®

## Choose Automation Tools

3

- ✓ RPA
- ✓ Analytics
- ✓ NLP
- ✓ OCR
- ✓ Biometrics

- ✓ AI
- ✓ Machine learning
- ✓ Chatbots / voicebots
- ✓ iBPM
- ✓ Low-code solutions

**Profinch**®

**Assess Business Value Change**

4



- ✓ Revenue
- ✓ Customer satisfaction
- ✓ Costs
- ✓ Errors

- ✓ Users
- ✓ Compliance
- ✓ Employee impact