

CASE STUDY

Citizens Bank deploys Bizagi to orchestrate data for RPA, touching over 50% of commercial loan portfolio



Citizens Bank®

Customer:

Citizens Bank

Industry:

Financial Services

Location:

United States of America

Citizens Bank is a top performing bank, distinguished by their customer-centric culture. Their plan to ensure the highest quality customer service possible was to deploy Robotic Process Automation in their commercial lending process. But data that was being passed to robots was not in a standardized format, which meant it was not usable.

Bizagi was used to initiate workflows and digitize the data, before passing it to Blue Prism RPA to be executed where appropriate. This coordinated data has helped employees to provide responses to customers in real time and accelerated the customer onboarding from 59 days to just nine days.

40 systems enabled by Bizagi & RPA

85% decrease in customer onboarding time

50% commercial loan portfolios supported by Bizagi & RPA

"We're using Bizagi to orchestrate all that data coming in, we're using Blue Prism and Bizagi to remove the noise that occupies most people's days. And leaving people with valuable work. And we're doing it all in parallel and that's really the critical piece."

Matt Lavoie

Head of Robotic Process Automation & DPA

Objectives

-  Improve customer experience by making data more readily available to employees
-  Reduce the 30 days it takes to complete customer requests
-  Unite colleagues and eliminate silos via a formalized workflow tool
-  Ready data coming into the bank for RPA to handle
-  Implement RPA in commercial lending process

Achievements

-  Optimized customer journey executed by Bizagi, while Blue Prism RPA completes tasks within with 40 different systems across the business
-  85% decrease in customer onboarding time thanks to automation
-  Bizagi allows staff to answer questions in real time by providing 360-degree view of customer data
-  Data formatted by Bizagi before being processed by Blue Prism RPA
-  RPA now touches over 50% of commercial loan portfolio