



Impulsionando a transformação dos negócios com automação inteligente

Rodrigo Cid, Sales Director SS&C Blue Prism

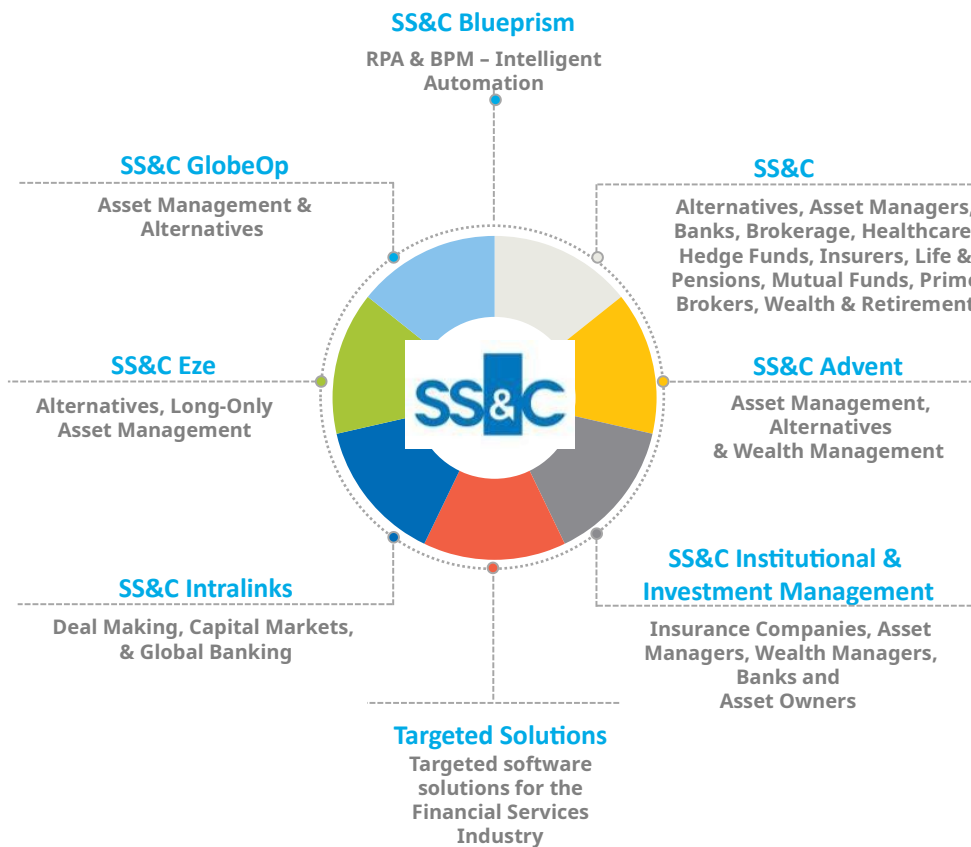




Rodrigo Cid

Sales Director LATAM





SS&C GlobeOp

- Outsourced Middle & Back Office Business Processing
- Tax Reporting
- Performance and Risk Analytics
- Investor Relations, Reporting, & Portal Self-Services
- Pre, Post, & Hypothetical Trade Compliance

SS&C Intralinks

- M&A Due Diligence
- Capital Raising
- Investor Reporting
- Debt Financing

SS&C Eze

- Order Management
- Execution Management
- Compliance
- Commission Management
- Investor Accounting
- Portfolio Management & Accounting

Targeted Solutions

- Financial Institutions
- Financial Markets Group
- FIX Trading Connectivity
- Property Management
- SS&C Learning Institute

SS&C Advent

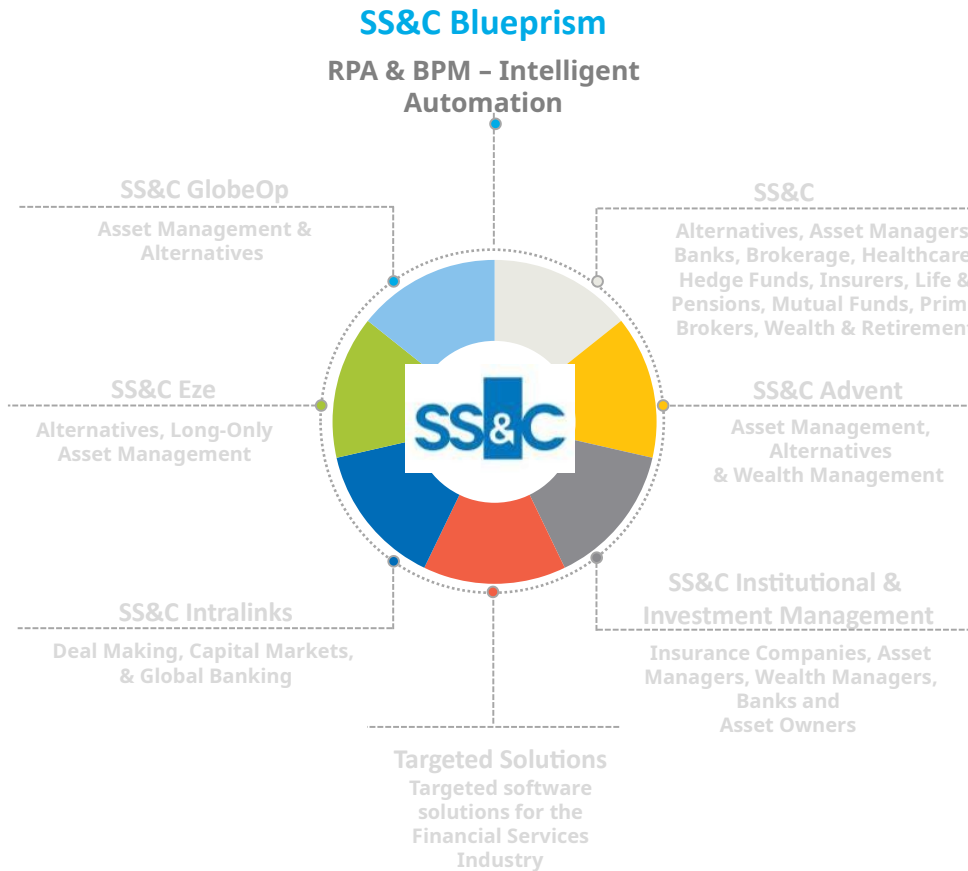
- Portfolio Management & Accounting
- Data Aggregation, Normalization, & Validation
- Standard & Customized Reporting Solutions
- Margin & Finance Management

SS&C Institutional & Investment Management

- Loan Accounting
- Portfolio Construction, Rebalancing, Trading and Compliance
- Client Communications and Portals
- Reserving and Credit Risk
- Reconciliation and Settlement Solutions
- Performance Measurement and Performance Attribution
- Investment Data Management

SS&C Blueprism

- Digital Process Automation/BPM
- OCR/IDP
- Low Code No Code solution
- Process Mining
- Task Mining
- Process Capture
- RPA
- Process Orchestration



SS&C GlobeOp

- Outsourced Middle & Back Office Business Processing
- Tax Reporting
- Performance and Risk Analytics
- Investor Relations, Reporting, & Portal Self-Services
- Pre, Post, & Hypothetical Trade Compliance

SS&C Intralinks

- M&A Due Diligence
- Capital Raising
- Investor Reporting
- Debt Financing

SS&C Eze

- Order Management
- Execution Management
- Compliance
- Commission Management
- Investor Accounting
- Portfolio Management & Accounting

Targeted Solutions

- Financial Institutions
- Financial Markets Group
- FIX Trading Connectivity
- Property Management
- SS&C Learning Institute

SS&C Advent

- Portfolio Management & Accounting
- Data Aggregation, Normalization, & Validation
- Standard & Customized Reporting Solutions
- Margin & Finance Management

SS&C Institutional & Investment Management

- Loan Accounting
- Portfolio Construction, Rebalancing, Trading and Compliance
- Client Communications and Portals
- Reserving and Credit Risk
- Reconciliation and Settlement Solutions
- Performance Measurement and Performance Attribution
- Investment Data Management

SS&C Blueprism

- Digital Process Automation/BPM
- OCR/IDP
- Low Code No Code solution
- Process Mining
- Task Mining
- Process Capture
- RPA
- Process Orchestration

O Retorno da Automação está Além da Economia de Custos



2019

2024

Eficiência operacional

**Desafios estratégicos,
transformação CX,
agilidade**

**Economia de
custos/tempo**

Crescimento, CX, EX

76% das organizações esperam ver um impacto positivo no crescimento dos negócios nos próximos 2 anos a partir de seu programa de IA.

- Forrester

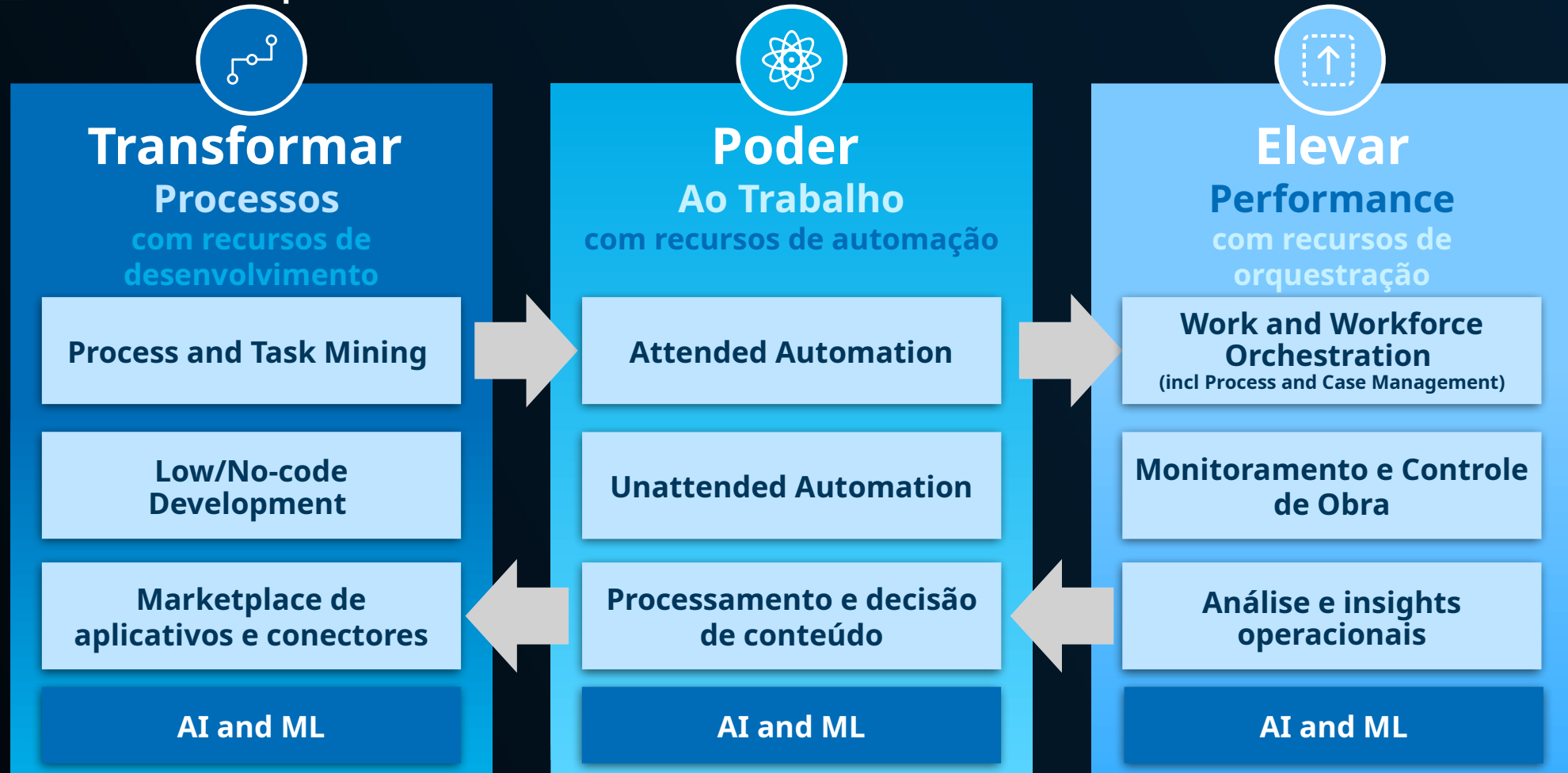
Source: A commissioned Total Economic Impact™ study conducted by Forrester Consulting on behalf of SS&C Blue Prism January 2024.

Base: 166 decision-makers across NA, EMEA and APAC with responsibilities for RPA and/or BPM in their organizations.





SS&C | Blue Prism Intelligent Automation



Delivered through an
AI-powered Intelligent Automation Platform and Operating Model

Automação inteligente com nosso **Ecosystema de parceiros estendido**

Process Intelligence, Process/Task Mining & Discovery	Rapid Development, Testing And Automation	Intelligent Document Processing	Production Management & COE Governance	Intelligent Business Process Management	Advanced Machine Learning	Natural Language Processing	Artificial Intelligence

Core Enterprise Platforms



Business Intelligence



Cybersecurity (Identity Management, Governance, Privileged Access)



Vertical Solutions



Mandato Top-down

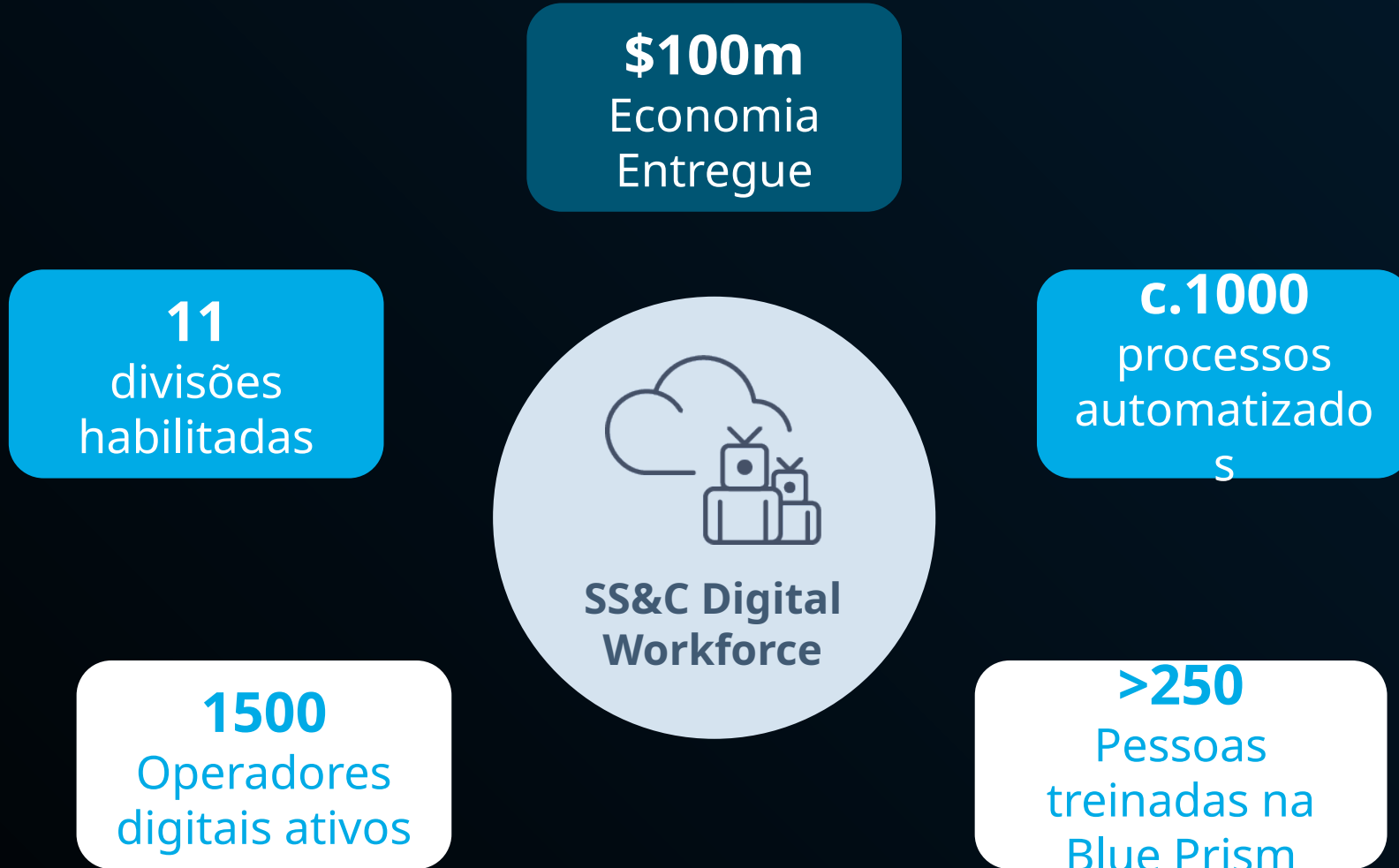


Nossa meta é que os trabalhadores digitais sejam de 5 a 10% de nossa base geral de funcionários até o final de 2023.

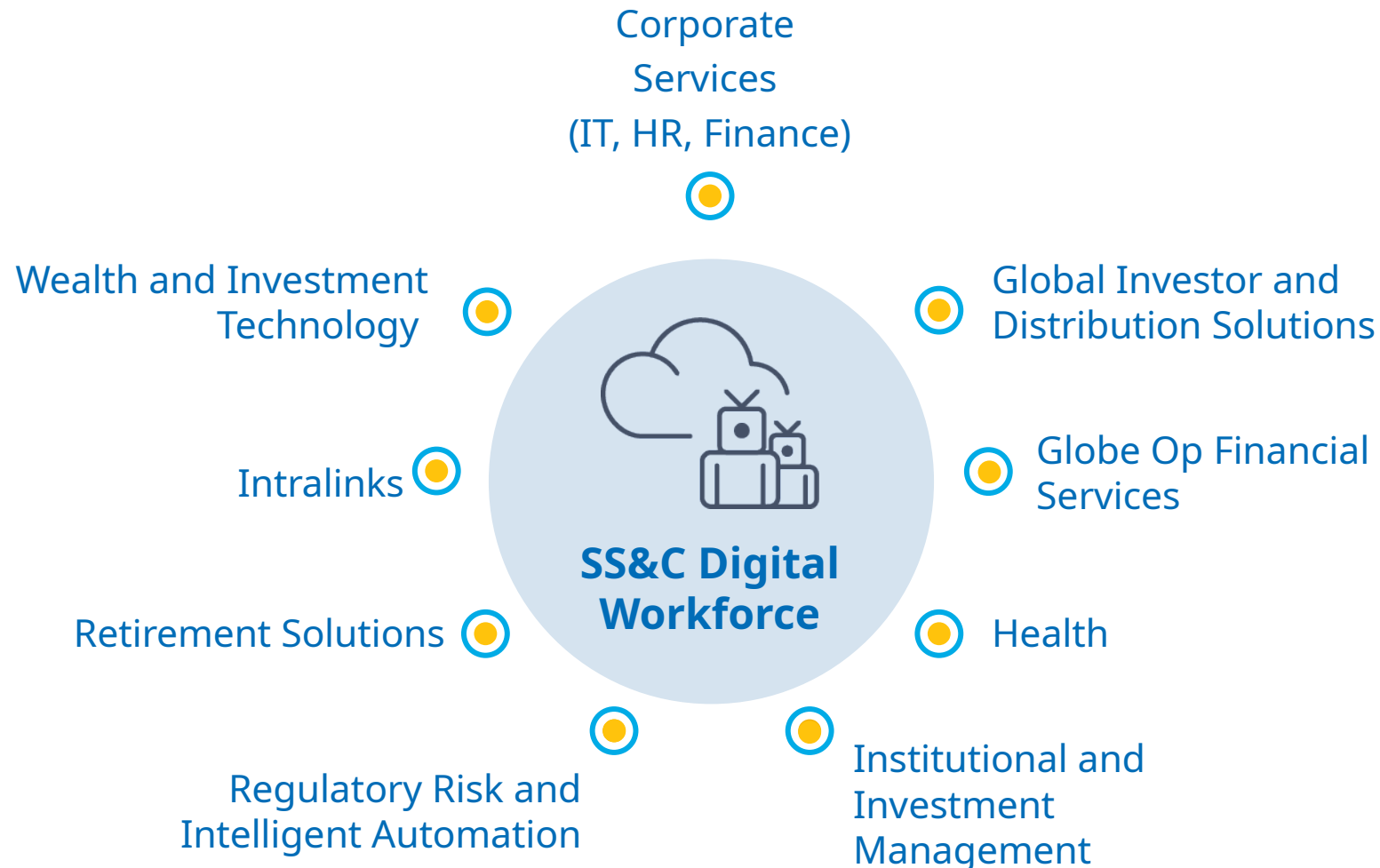
- Bill Stone, CEO SS&C Technologies
Q3 Earnings, October 2022



2023 Achievements



Divisões habilitadas para Blue Prism



Top Use Case Areas

Risco e Conformidade (KYC, AML, TM)

Reconciliações contábeis de fundos

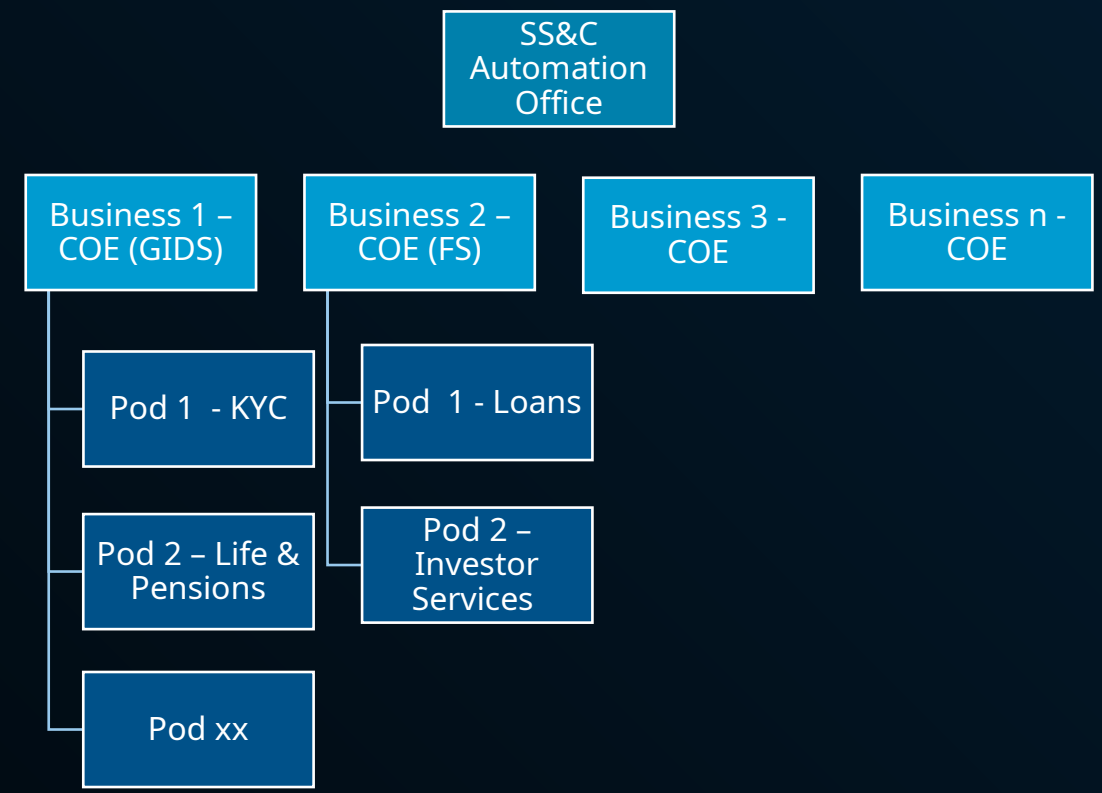
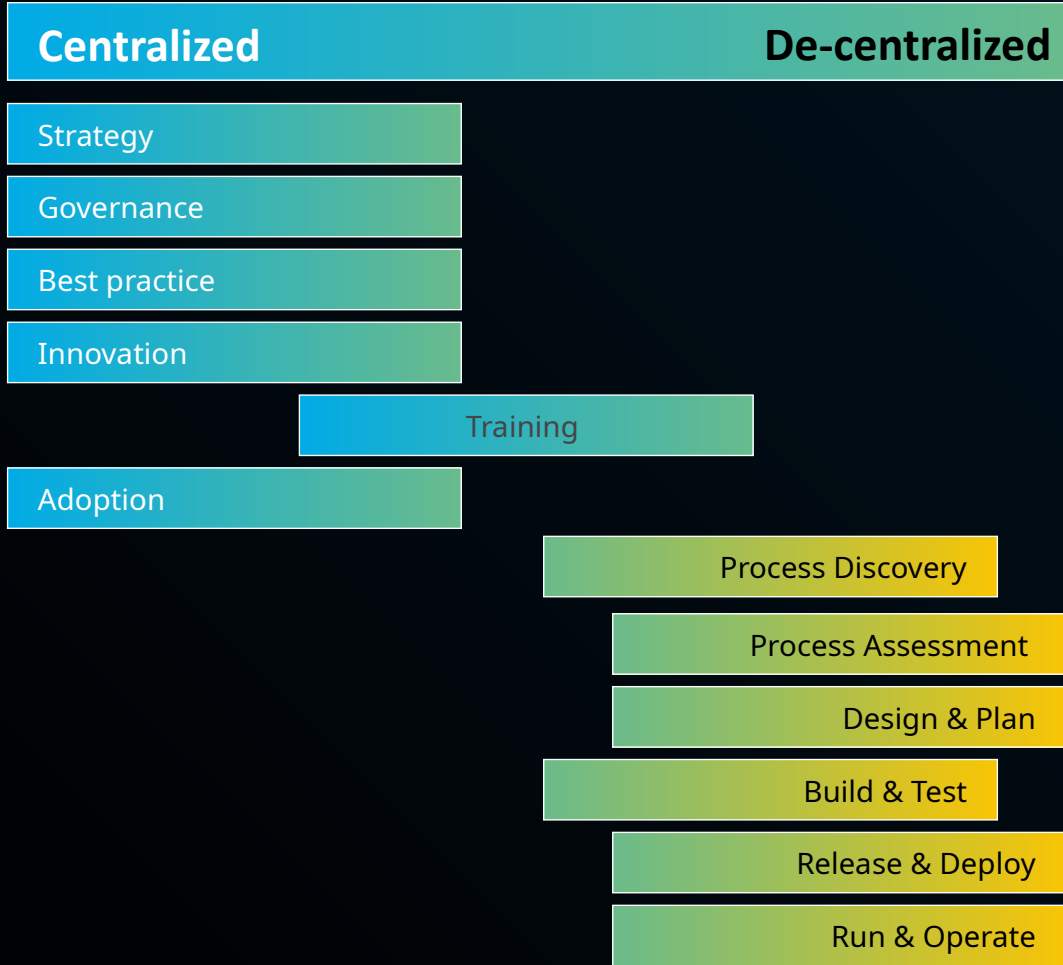
Integração e manutenção do cliente

Agência de Transferência

Administração de Pensões

Processamento de Sinistros (Saúde, Vida)

Operating Model



Por que está funcionando para cada área de negócios



Autossuficiência dá controle às equipes de operações, o que cria confiança e, por sua vez, leva a maneiras criativas de resolver desafios de negócios



Qualificação dos recursos existentes é uma estratégia econômica, alavancando orçamentos, habilidades e número de funcionários existentes, eliminando o custo de novas contratações e garantindo um rápido dimensionamento



Consistente com o modelo operacional existente herda assim os elementos centrais dos processos existentes (SLAs, controles, segurança, continuidade de negócios, gerenciamento de custos)



Controle e governança por meio de uma equipe central de especialistas em automação

GenAI @ SS&C

Before Automation

— CHALLENGES

High Volumes of Manual Repetitive Work

The operations team scans thousands of emails daily, then reviews, processes, and classifies.

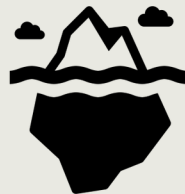
Causes **low morale, employee attrition, and poor productivity**



Increasing Complexity

Large teams dedicated to validating complex trade confirmations. Documents are time-consuming to process, causing increased errors

Causes **re-work, delays, and lower client satisfaction**



Inefficient Knowledge Management

The legal/Finance/Call Center team deploys tools to search a corpus of documents to answer internal and external queries. Humans filter through multiple results returned to identify and collate the best answers.

Causes **slow turnaround times and reduced client satisfaction**



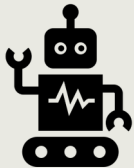
Our Solution

SS&C Blue Prism Digital Workers Powered by GenAI

SOLUTION

Automation & Orchestration

SS&C internally-hosted Gen AI solution powered by Blue Prism digital workers and SS&C Blue Prism Chorus workflow engine.



Simplicity

Frameworks and process flows built using Open Source LLM Llama3 as the core of the GenAI solution. FAISS Vector database provides “local context” for each client.



Secure Data

100% secure with no content leaving the SS&C environment with control & governance in place



IA & Gen AI: Maintenance Address Change

Status: **In Production**

“Emails with address changes are sent frequently and need to be processed manually!”

Logistics Manager

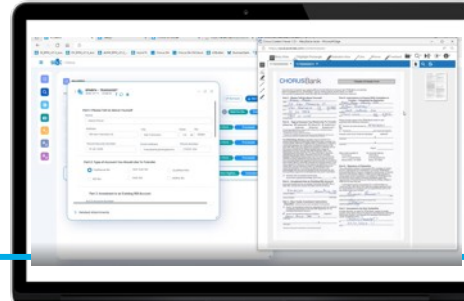


Scan Mailed Documents



Digital worker downloads mailed/ scanned documents from AWD via rest API

Read Document Data



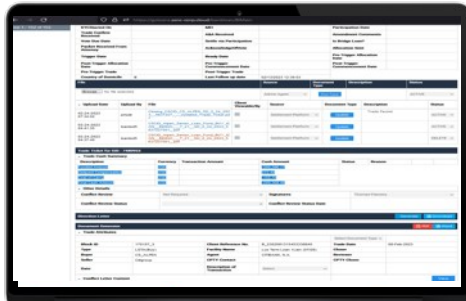
OCR will scan the data using Blue Prism

Query LLM for Address



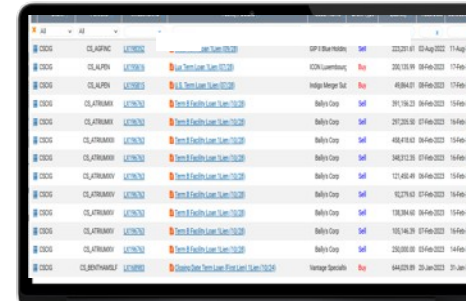
Send the data to LLM to extract address details

Retrieve Address Details



LLM retrieve information from documents and sends back to Blue Prism

Update Master Data



Blue Prism automatically updates details in TA2000

“The process is now almost entirely hands free thanks to IA & Generative AI!”

Logistics Manager



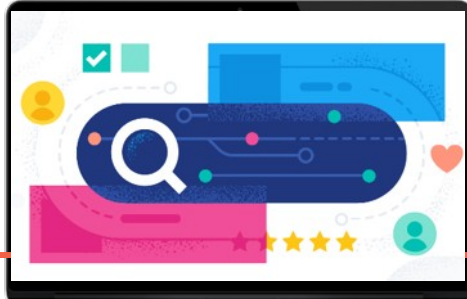
IA & Gen AI: Credit Agreement Processing

Status: **In Production**

"We need to ensure consistent credit data across our systems."

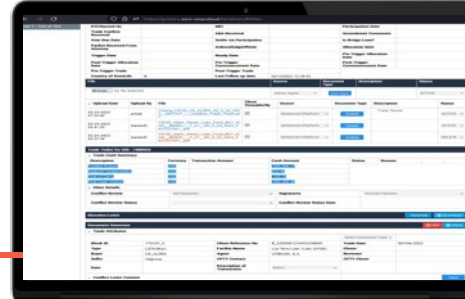
Credit Manager

Access Credit Agreements



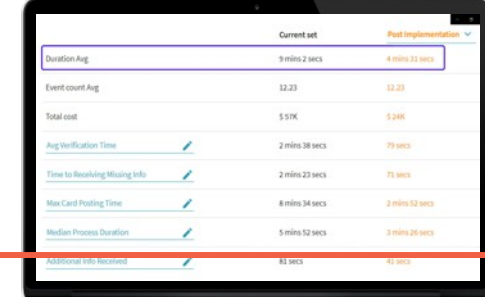
Digital worker downloads credit agreement documents from a shared drive and sends to Gen AI

Gen AI Extracts Key Details



Gen AI extracts the information security details based on the relevant prompt

Fetch GoCSM Mapping Files



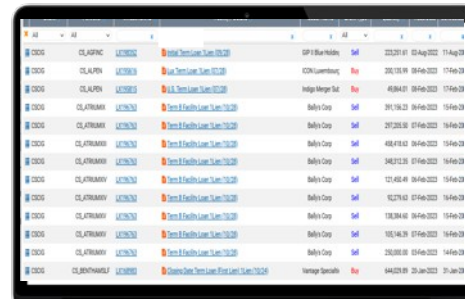
Digital worker downloads GoCSM Mapping files which has all the respective security details

Validate Results



Validate GoCSM mapping file with the GenAI credit agreement result

Update Master Documents



Digital worker sends corrected security details in new upload file to the original shared drive

Reconciliation process is now all done automatically via SS&C Blue Prism and Gen AI



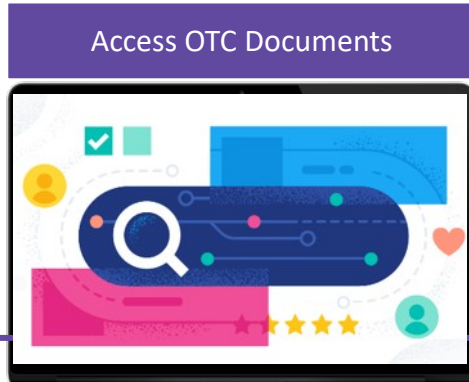
Credit Manager

IA & Gen AI: Order to Cash (OTC) Confirmation

Status: **In Production**

"We need to process 100s of OTC confirmation documents for downstream processing and it gets very intensive!"

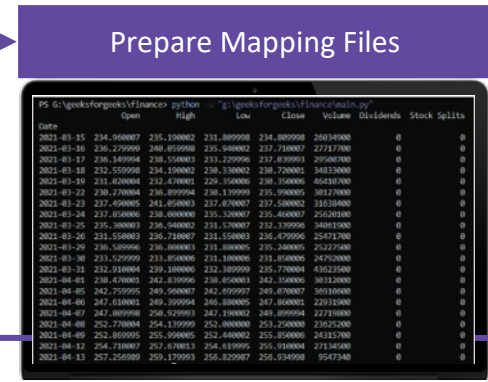
Finance Lead



Digital worker downloads OTC documents from a shared drive and sends to Gen AI



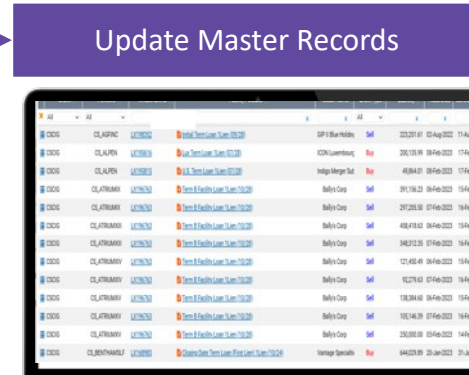
Gen AI extracts information like swap type and account type



SS&C Blue Prism prepares mapping file using extracted data



Validate mapping file with system data



Digital worker sends corrected security details in new upload file to the original shared drive

Processing is completed via SS&C Blue Prism and Gen AI with all systems updated automatically



Finance Lead



A SS&C está a caminho de ter até 3.000 trabalhadores digitais em 2024 e outros 10.000 a 15.000 até 2028'

-Bill Stone, CEO SS&C Technologies



RPA and Automation

Key achievements



331 Process Automations Delivered



231 Running
USD 6 M Savings / Cost Avoidance



25K+ Hours Productivity monthly



118 + FTEs Equivalent



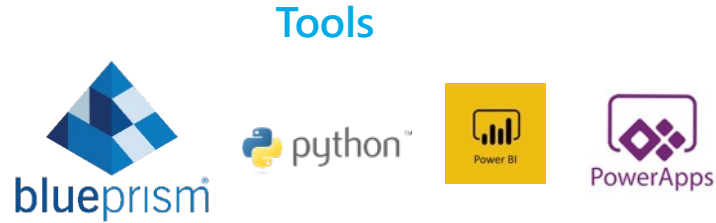
230k+ Executions monthly



260k + Processed Items



6% - Exceptions
2,6% - Terminated



Team structure



Performance and Quality Dashboard



Automations in all processes, from quotation to payment

PTP

Automations for commercial portfolio management and delivery scheduling

CS

Automations from tax calculation to tax payment

TAX

Automations from accounting entries to closing

RTR

- + HR
- + Risk Position
- + FP&A
- + Controlling

Flow control and weighing of trucks up to billing

Wheat

BBS Automations

Automations from credit analysis to reconciliation

CTC

Automations to support export and import procedures, including document reading with OCR

GTE

Automations with Artificial Intelligence

Hexane Price Prediction



In 2023, 26% of BBS Tickets were attended by one of our bots

Alguns Exemplos



Exemplo de Automação – Processo de Faturamento

1

Comercial



Faz a venda e Cria Pedido no SAP



2

Logística



Realiza o agendamento da carga com Dados da DT;



3

Robô



Pega os dados da DT no SAP lança no GoFusion



4

Robô

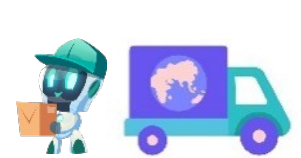


Coleta os dados da 1º Pesagem e Lança no Sistema GoFusion



5

Industria



Caminhão Carregado com a Carga



6

Robô



Coleta os dados da 2º Pesagem e lança no GoFusion



7

Robô Granel



Ajusta a Remessa no SAP e ajusta Laudo no da Carga no GoFusion



8

Robô Envase



Realiza apontamento de estoque e finaliza etapa no GoFusion.



9

Robô Qualidade



Realiza liberação de Qualidade.



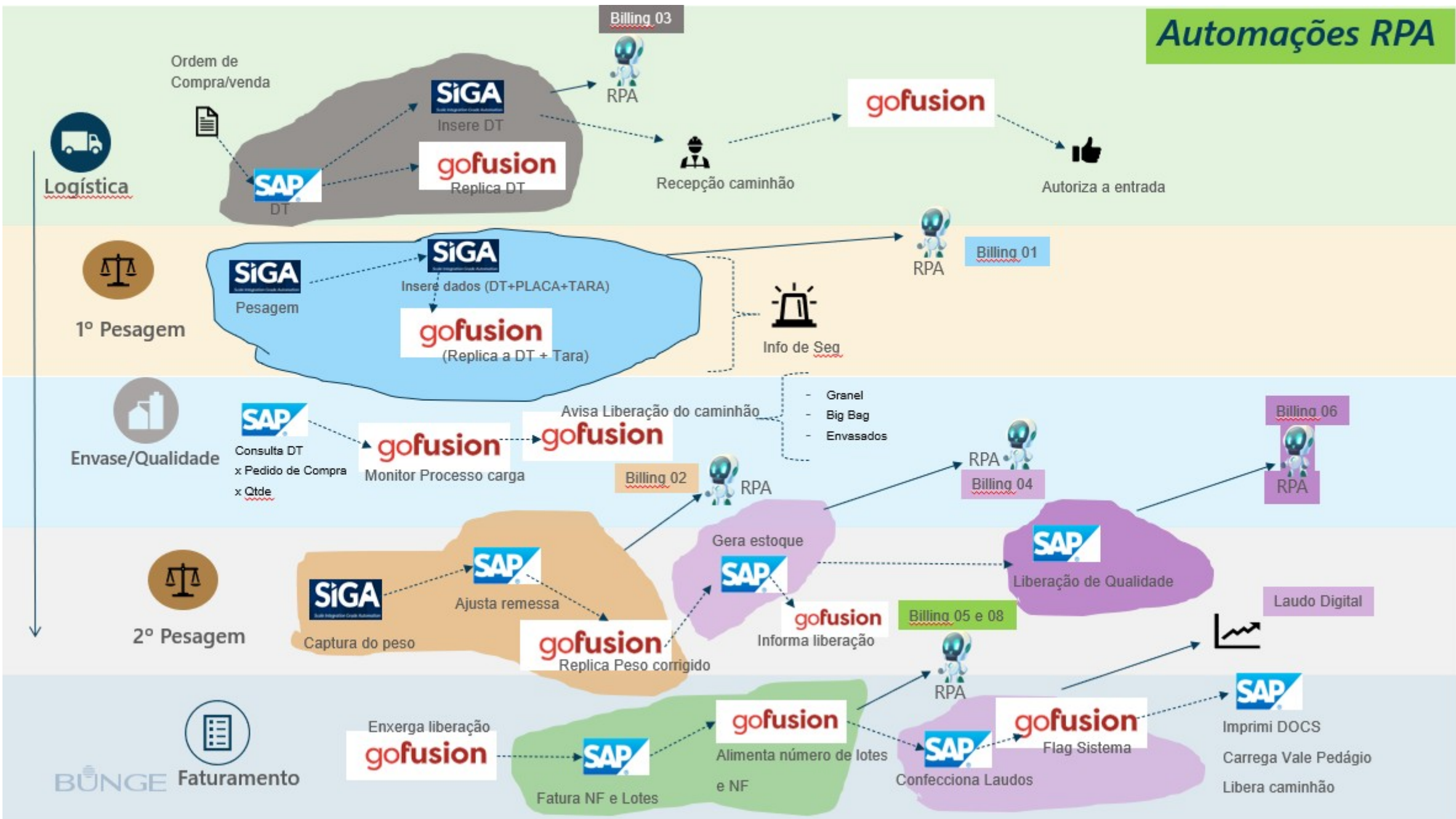
10

Robô Faturamento

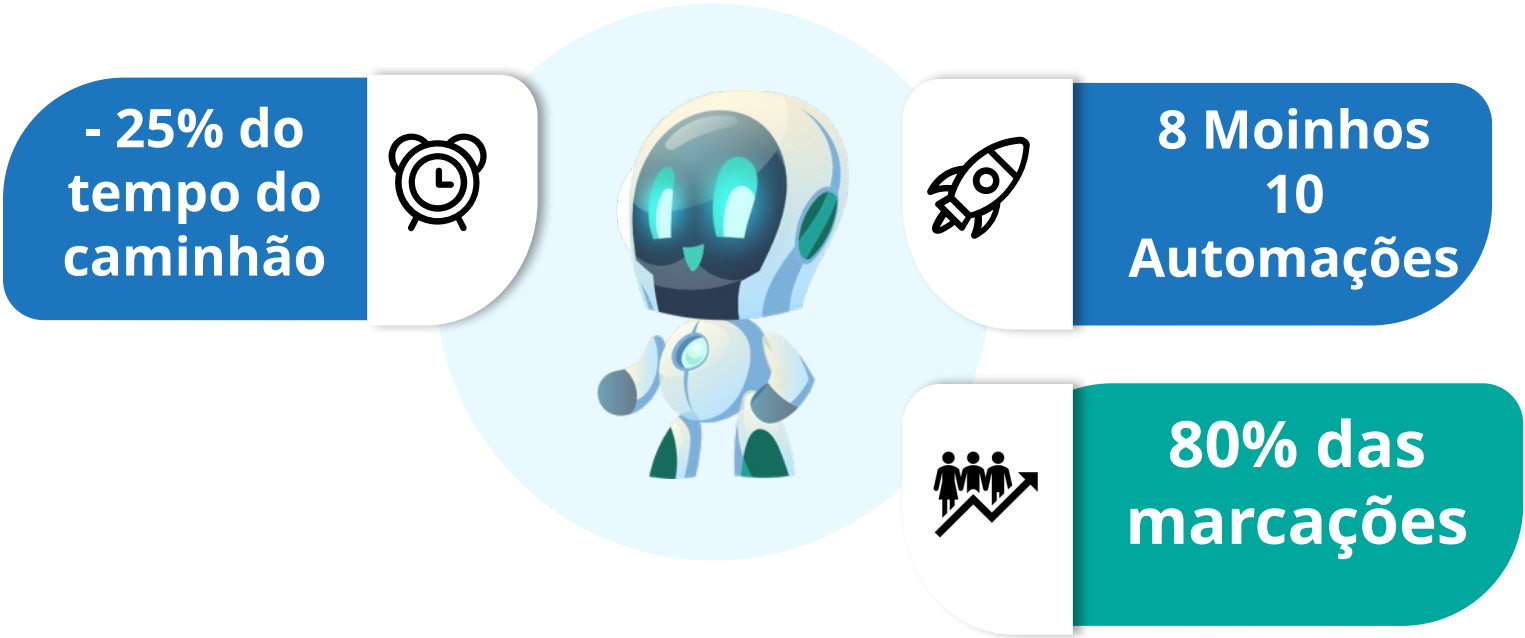


Dispara a etapa de faturamento para liberação da Carga





Resultados



Treinamento



Treinamento de RPA

Mais de
90
Pessoas
Treinadas
em Blue Prism



Na semana do dia 13 de junho, o time de Automação e RPA do BBS Gaspar realizou um treinamento para 40 colaboradores de áreas diversas da empresa como, operação, financeiro e corporativo do Brasil e da Argentina. "A chave da transformação digital é a transformação de pessoas, por isso, estamos muito felizes em ampliar cada vez mais o público dos nossos treinamentos, incluindo também colaboradores da Argentina e de outras áreas do negócio.," afirmou Bruno Beserra, coordenador do time de RPA.

por Jessica Martinez Feller
Publicado 3 dias atrás

👍 Likes 13

CURTIDO POR



Melhores Comentários ▾ 3 COMENTÁRIOS

Genesis Alexis Ramirez Gutier... 3 dias atr...
Foi realmente incrível e enriquecedor!

Escreva um comentário



0/500



SS&C | blueprism[®]

