

AI TRANSFORMATION TALES

Gen AI helps speed up email data extraction by 40%



BACKGROUND

With more than 1,000 experts working from over 15 countries around the world, the client is a global leader in the investment fund industry. Trusted for its technology solutions, research and analysis, international network and expert insights, the client provides transparency and enables efficiency to unlock business potential for fund managers, distributors and financial advisers. In a few words, what made the client approach Aspire to entrust us with this transformative business opportunity was:

The Asset Management team within the client's organization faced a significant challenge in efficiently managing the influx of emails and attachments. The manual process of reading each email, identifying the relevant team or individual, and extracting critical information from attachments was time-consuming and prone to errors. This inefficiency resulted in delayed responses, increased workload, and potential oversight of important information. The team sought Aspire for an innovative and proactive solution to automate this process, enhance their productivity, and ensure that critical information was promptly routed to the right recipients using AI.



BACKGROUND

The objective of this collaboration was to:

- Develop an automated system that could read email bodies, identify relevant recipients, and extract critical information from attachments
- Streamline the routing of emails and information to the respective individuals or teams promptly and accurately
- Enhance their productivity, ensure timely responses, and mitigate the risk of overlooking important information



THE SOLUTION

To address the challenges faced by the Asset Management team, our team of AI specialists designed an innovative solution that revolutionized their email handling processes. By leveraging advanced automation and AI technologies, they aimed to streamline email data extraction and auto-routing, enhancing efficiency and responsiveness.

Moving forward, our experts implemented an intelligent email routing system, ensuring that emails reached the respective teams and individuals promptly and accurately. This automated process eliminated manual intervention, reducing response times and improving overall productivity. As anticipated, the system efficiently directed emails to the right recipients, ensuring no inquiry or critical information was overlooked.

Working closely with the client's asset management team, our experts could understand the context and content of incoming emails, enabling them to generate personalized and informative replies. Now that we have implemented Gen AI to autoreply emails to the customers, users will receive timely updates and statuses. This special effort enhanced the client's responsiveness and customer satisfaction. The following actions were executed during the project:

- **Efficient Query Handling:** We designed an automated system to instantly respond to user queries regarding claim status.
- **Real-time Data Integration:** The AI model integrated with the organization's systems to access and provide accurate, up-to-date information.
- **Self-Service Empowerment:** Users could obtain quick resolutions through this self-service feature, reducing the need for direct customer support interaction.
- **Reduced Support Burden:** By providing direct answers to users, the system lessened the workload on customer support staff, allowing them to focus on more complex inquiries.
- **Enhanced User Experience:** This efficient query handling improved the overall user experience, ensuring timely and accurate information delivery.



TECHNOLOGY SNAPSHOT

- Gen AI and Machine Learning



BUSINESS BENEFITS

- 30-40% decrease in email response time
- Satisfactory SLAs compliance
- Ability to manage high volume of emails
- Reduced error-rate and improved responsiveness



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For more info contact: info@aspireSYS.com or visit www.aspiresys.com

USA

+ 1 630 368 0970

SINGAPORE

+65 3163 3050

INDIA

+91 44 6740 4000

BELGIUM

+ 32 3 204 1942

NETHERLANDS

+ 31 (0)30 800 92 16

POLAND

+48 58 732 77 71

MEXICO

+52 222 980 0115