

# CASE STUDY



## 100% Automating Account Opening & Amendment for a leading Banking Partner

### BUSINESS CHALLENGES

One of our Big-4 Australian banking partners needed to streamline the time-consuming and repetitive process of opening and amending CCA and PFA accounts. The existing manual workflow involved reading data from XML and PDF files, updating records in the bank's internal web software, and creating communication materials like flyers and welcome emails—resulting in delays and human errors.

### OUR APPROACH

We built a fully automated, end-to-end solution that eliminated manual intervention.

The system:

- Extracts data intelligently from XML and PDF files
- Executes required actions within the bank's internal web application
- Automatically generates personalized Word documents, welcome emails, and flyers ensuring consistent communication at every step

### TECHNOLOGY USED

- **Power Automate Desktop RPA** for robust and secure process automation
- **OCR & Data Extraction** to handle both structured (XML) and unstructured (PDF) content
- **System Integration** with internal web-based banking software
- **Document Automation** for compliant and branded communication material creation

### VALUE DELIVERED

- Achieved **100% automation** of the account opening and amendment process
- Reduced turnaround time with significant time savings
- Eliminated manual errors and improved data accuracy
- Enhanced operational efficiency and freed up teams for higher-value tasks

