# Zarion
# Automate
Core back-office processes, made simple

**If your business units suffer from administrative backlogs and back-office processing delays, Zarion Automate will increase your productivity and streamline processes. Using automated processes means lower operating costs and increased efficiencies, ensuring your staff can focus on skilled tasks, allowing technology to do the groundwork.**

### High regulatory standards requires robust back-office processing

Large, highly regulated, process-centric businesses need to improve operational efficiency and gain an overall view of all activities by streamlining and improving processes and driving automation. However, the time required and high costs of implementing document and process management solutions is frustrating for business users who have often invested in solutions that failed to roll-out beyond one or two business areas. Coupled with this is the ongoing high cost of maintaining and developing customised applications.

In many instances, after the initial implementation, businesses are left with complex, outdated, closed applications that cannot be further developed to meet their changing needs. This leaves the business users with an unsuitable legacy application and an extensive investment in infrastructure and platforms which can be difficult to discard. While the importance of process improvement in Financial Services is undoubted, solutions that encourage flexibility and drive continuous improvement should be prioritised. Your business needs a robust framework for the automation, distribution and monitoring of work in your organisation with effective and efficient processes. A focussed application devoted to process improvement, implemented by experienced engineers, will identify the most appropriate configuration for your network and tailor it based on your business requirements.

### Zarion Automate is used to improve processing in the following areas

- Customer On-boarding and Servicing
- New Business Underwriting
- Policy Administration
- Mortgage Processing and Servicing
- And more…

### Why customers choose Zarion software?

Our experience, built up over 15 years addressing workflow and process challenges in financial services, has enabled us to develop innovative software which helps reduce costs, increase operational efficiency – and meet audit and compliance requirements.

Our team of experts work closely with our clients to implement our software products, providing the knowledge and experience necessary to successfully meet the needs of global businesses and quickly and reliably deliver business benefit. We work with both business and IT teams to ensure that IT is enabling the business every minute of every day.



simplifying the complex

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## How does Zarion Automate work?

Zarion Automate focuses on eliminating high-volume, low value tasks, ensuring your team members can focus on skilled or value-added tasks. The tasks handled by Zarion Automate range from automated opening of customer accounts to document capture and many tasks in between.
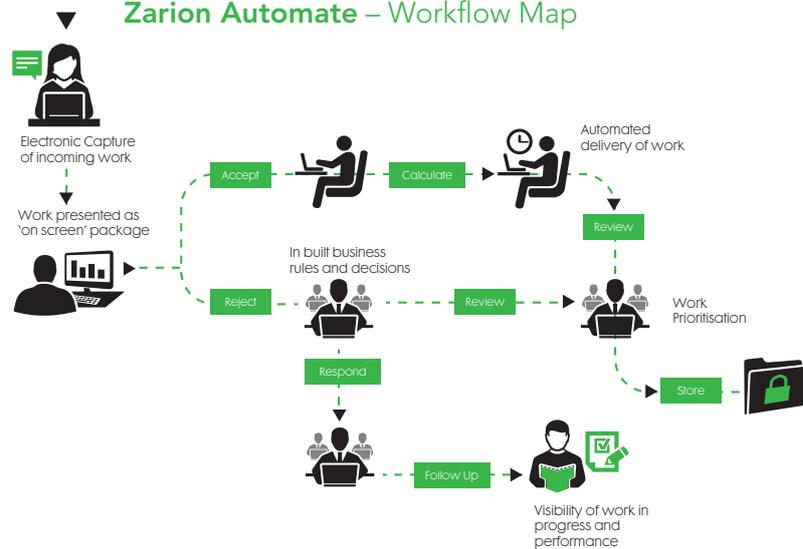
All incoming information and items of work (e.g. paper, forms, email, fax, web forms, office docs, outbound docs, voice, etc) are captured at the point of origination. Business information and work items are automatically identified and categorised, routed to the appropriate process or department and tracked until they have been completed. Zarion will work with you to identify and isolate the exact processes which will be improved and ensure your implementation targets specific issues relative to your business requirements.

Your team members have instant access to all the information they need to accelerate their workflows and respond to customers much more quickly and with greater accuracy.

Measurement and monitoring reports will equip your supervisors and team leaders with clear visibility of multiple processes and provide actionable insights right across your organisation.

### Zarion Automate – Workflow Map

Electronic Capture of incoming work

Work presented as 'on screen' package

Accept — Calculate — Automated delivery of work — Review

In built business rules and decisions

Reject — Review — Work Prioritisation

Respond

Store

Follow Up

Visibility of work in progress and performance

## Key Features – at a glance

- Case and Document processing in a single **easy to use flexible, configurable** user interface
- **Automated rule-based** case work scheduling, routing and tracking
- **Multiple integration points** allowing you to integrate data from multiple systems
- Online access to content on repository allows ad-hoc users to **retrieve and view content easily**
- **Iterative approach** means you can deploy new processes or build in functionality according to your business needs.
- Rich functionality and Intuitive front-end design ensures **fast and easy deployment.**

*Using Zarion Automate, you can ensure that your business processes are streamlined, your dependencies on paper and manual intervention are eliminated, your turnaround and response times to customer queries are faster and your productivity is significantly enhanced.*

## What Zarion Automate can do for your organisation...

**Increase productivity** – transform your work processes by capturing critical business information at the point of origin. Improve your ability to search and retrieve documents. Find critical information when and where you need it and make more informed decisions.

**Streamline processes** – remove bottlenecks associated with lost or missing information by safely storing and managing documents and automating information-routing within your critical business processes.

**Reduce cost of operations** – gain economies of scale by reducing system maintenance and labour costs through process automation.

**Enhance customer satisfaction** – by automating processes you'll enhance your customer's experience every step along the way from account opening through to ongoing retention.

**Support regulatory compliance** – improve your internal controls, ensure compliance and reduce risk with an auditable record of your work.

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