

# DELIVERING TRANSFORMATIONAL VALUE THROUGH INTELLIGENT AUTOMATION

SS&C Blue Prism on Amazon Web Services (AWS)

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# Agenda

- Who is SS&C Blue Prism?
- Intelligent Automation – Business case and results
- Blue Prism Platform & AWS Services
- Blue Prism Cloud On AWS & AWS Marketplace

# Who we are: SS&C Technologies



- Public company with \$20B+ market capitalization (NASDAQ: SSNC)
- SEC reporting made publicly available at [ssctech.com](https://ssctech.com)
- Operation in 106 cities across 40 countries
- \$15.2 billion invested in research and development and acquisitions since 2012



## Focus on Expertise

- 25,000+ employees world-wide
- Committed to continuous training and employee development
- Employee certifications include Ph.D., CPA, CFA, CA, PMP, CBCP, MBA, etc.
- Employee stock option grants align SS&C's business objectives with client satisfaction



## Track Record of Delivery

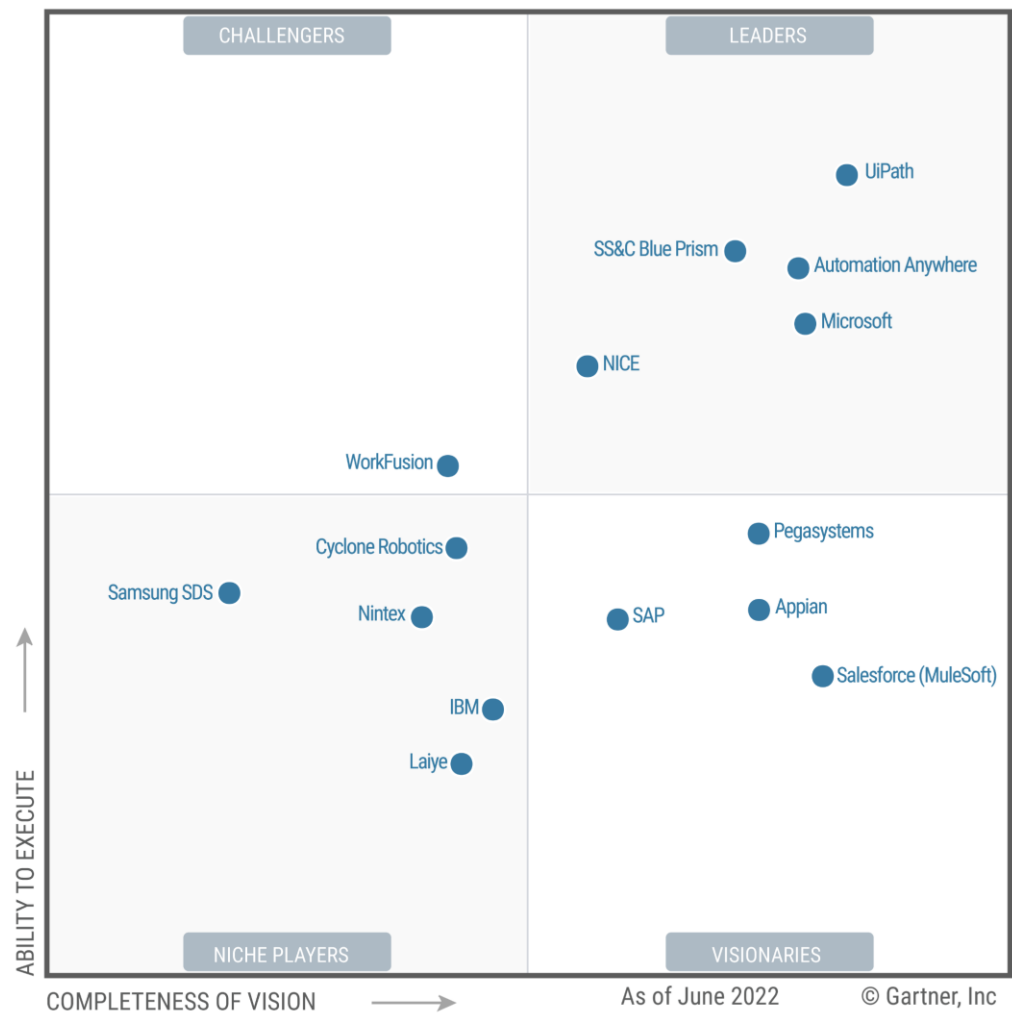
- Provide market-leading software and service solutions to financial and healthcare industries globally
- Own and operate our data centers and private cloud
- SaaS, PaaS, license, services, and hybrid delivery models
- Largest financial services and healthcare firms in the world rely on SS&C technology



## Trusted Proven Provider

- 20,000+ financial services and healthcare companies
- \$3.4+ trillion in assets under administration
- 56.7 million accounts maintained on SS&C's transfer agency platform
- 497 million health claims processed using SS&C's pharmacy solutions

Figure 1: Magic Quadrant for Robotic Process Automation



Source: Gartner (July 2022)

# SS&C BLUE PRISM Named 2022 Gartner® Magic Quadrant™ Leader For RPA

For the 4th consecutive year, SS&C Blue Prism is a Leader in the 2022 Gartner Magic Quadrant for Robotic Process Automation for Completeness of Vision and Ability to Execute.

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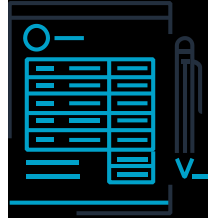
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# Digital transformation is easier said than done...



**Legacy systems lack the ability to integrate to emerging technologies**



**Manual tasks significantly hinder operational efficiency**



**AI models don't typically account for security and compliance standards**

**“Majority of all transformation initiatives will fail to deliver the business results companies expect.”**

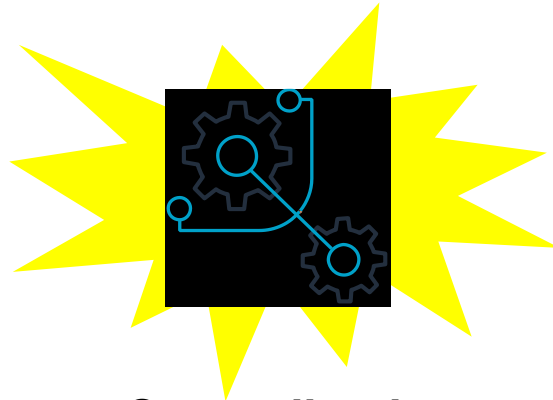
— McKinsey, BCG, KPMG and Bain & Company

# How Blue Prism enables digital transformation

Intelligent Automation on AWS (IA)



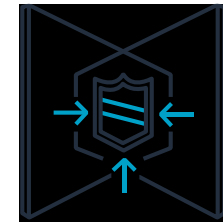
**Reusable process  
automation**



**Streamlined  
access to AI/ML**



**Flexible design and  
configuration**



**Strict access and  
compliance controls**

Intelligent automation is the most  
impactful lever to deliver your goals.

# Key AWS artificial intelligence & machine learning integrations

Blue Prism RPA is an efficient gateway to AI/ML for any business process

Blue Prism natively integrates to AWS AI and machine learning (ML) services to enhance any existing automation workflows



## Amazon Rekognition

AI-enhanced image and video analysis that identifies objects, people, text, scenes, and activities, and also detects inappropriate content



## AWS Comprehend

Natural language processing (NLP) that uses machine learning to find insights and relationships in text, including key phrases, places, people, brands, and even the connotation of content being analyzed



## AWS Textract

Machine learning is used to instantly “read” virtually any type of document without the need for custom code, reducing the time it takes to process documents

# Intelligent Automation Is Unlocking Transformational Business Value

Profitability / EPS	<b>\$3.8m</b>	Revenue contribution by reducing customer attrition	Financial Services <b>ATB Financial</b>
Driving Change & Innovation	<b>£1m</b>	Business value by driving a culture of continual innovation	Manufacturing <b>Jaguar Land Rover</b>
Productivity	<b>300%</b>	Increase in customer support productivity	Telecommunications <b>Telefonica</b>
Customer Experience	“The ultimate goal is to give capacity back to our frontline care delivery teams .... to focus toward that human element of providing clinical care.”		Healthcare <b>Alberta Health Services</b>
Employee Engagement	“We want our employees to be on the edge of innovation — driving creativity and opportunities.”		Manufacturing <b>Coca Cola</b>

# Customer Success Story: WEX



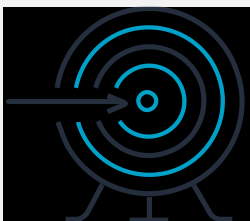
## Challenge:

WEX needed to import 175K new accounts into Siebel, including the printing of 1.1M cards. Their existing process only allowed for 25K total accounts and would still have taken six months to finish. Additionally, their data was not ready, and needed to be cleaned.



## Solution:

Invoke, a Blue Prism partner, used Trifacta – an AWS tool available via Amazon Machine Image (AMI) – to efficiently clean the data without involving IT. Invoke used Blue Prism to build an RPA-based import engine that could import files 24/7, leveraging built-in error control and reporting for easy tracking.



## Outcome:

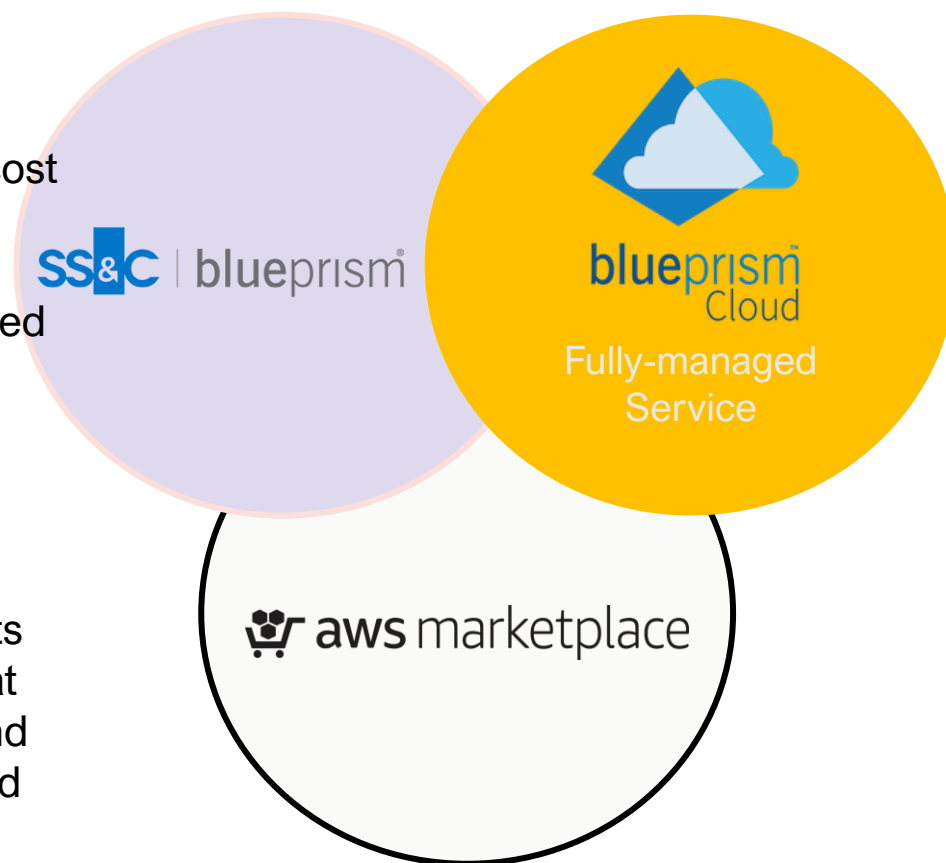
- Trifacta reduced the 7-week data cleansing process to 1-2 weeks
- Blue Prism cut the 10-week migration down to 4 weeks
- The joint solution enabled WEX to complete their Siebel import on-time, with no additional impact to the business
- WEX continues to use the process to import new accounts.

# Introducing Blue Prism Cloud on AWS

## SS&C | Blue Prism Cloud on AWS

– a fully managed, intelligent automation platform – empowers organizations to accelerate their business transformation, while significantly reducing their total cost of ownership.

- Secure platform with guaranteed service levels (monitoring, redundancy and business continuity)
- Pre-configured digital workers
- Dedicated instance tailored to specific customer requirements
- Flexible commercial model that allows the client to scale up and down to meet dynamic demand



## B e n e f i t s

### Increased Operational Efficiency

Improve operations holistically across entire customer journeys and increase company-wide productivity.

### Maximum Return on Investment

Reduce effort and infrastructure costs while maintaining the highest levels of security, performance and governance.

### Faster Time to Value

Move at speed your business demands and maximize limited resources with the digital workforce.

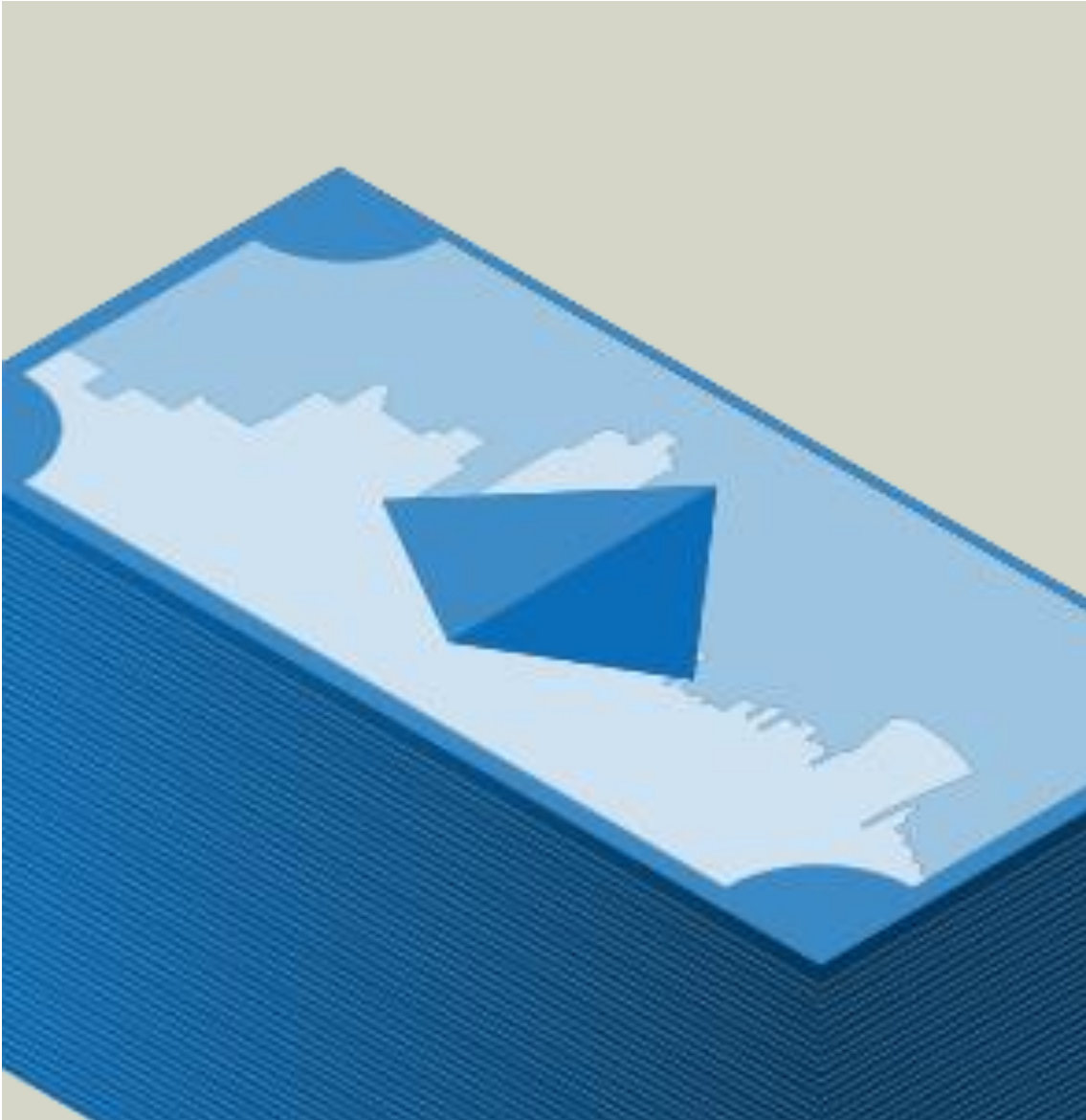
### Flexibility & Constantly Adapting

Rapidly scale up to meet demand peaks and adapt to changing business priorities with agility and precision.

**Thank you!**

**Any questions, please reach out to us  
at [apac.marketing@blueprism.com](mailto:apac.marketing@blueprism.com)**





# WEALTH MANAGEMENT with SS&C Blue Prism

WEALTH MANAGEMENT USE CASE

# Wealth Management: Acquisition

## Transfer of Financial Assets

### — TYPICAL CHALLENGES

#### Customer delays and frustration

- Slow turnaround times
- Common mistakes and errors
- Poor customer service

#### Poor employee experience

- Time-consuming, repetitive, manual work
- Inconsistent, unstructured processes
- Multiple, unintegrated systems
- Customer disputes / frustration

#### Low productivity and straight-through

- Labor-intensive, error-prone, costly activities
- Large volumes of paper in various formats & places
- Poorly designed workflows / limited visibility



#### Poor compliance & security

- Error-prone processing
- Potential for fraud
- Inconsistent processes and workflows

# Wealth Management: Acquisition

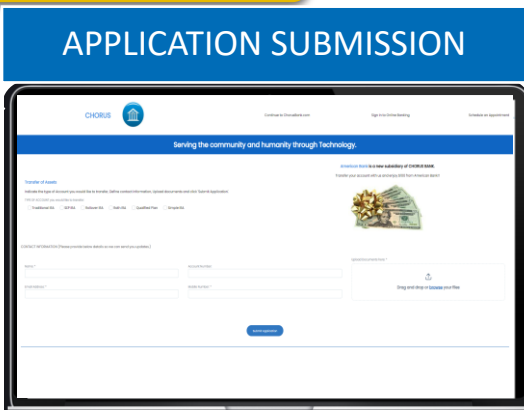
## Transfer of Financial Assets

### + VALUE AND BENEFITS

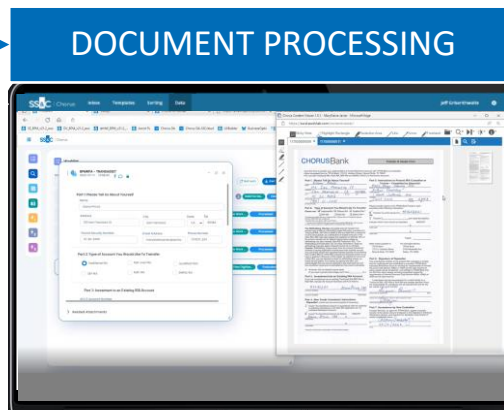
Enhanced customer experience	Higher productivity and straight-through	Improved employee experience	Higher compliance, lower costs
<b>99% reduction</b> In time to process monthly rebalance of trades	<b>85% reduction</b> In resource hours per month	"The overall investment experience has improved the morale within the team."	<b>100% accuracy</b> Operational risk of human errors completely removed
 MMC	Large American mutual fund	Large New Zealand investment services co	 MMC

# Wealth Management: Transfer of Financial Assets

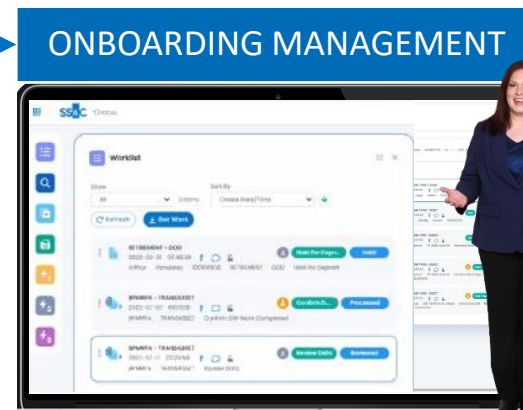
Diana wants to start saving for retirement and applies for an IRA



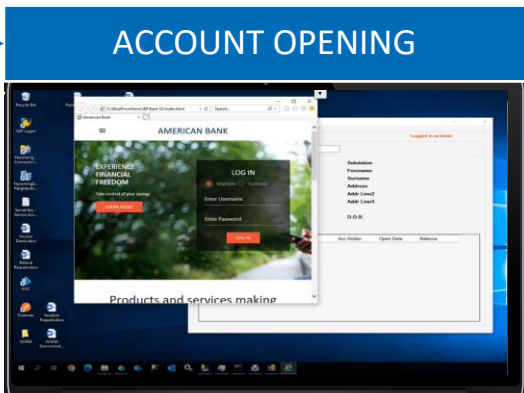
Connect **journeys**; transform **experiences**



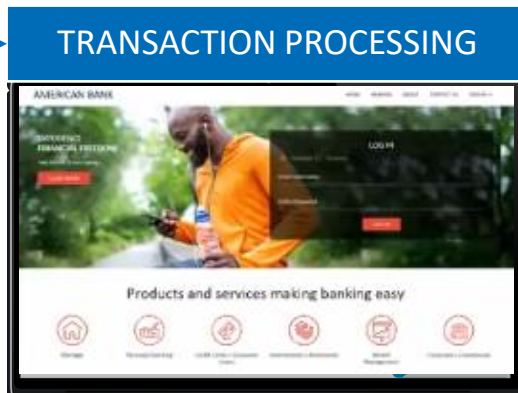
Process documents quickly with **98% accuracy**



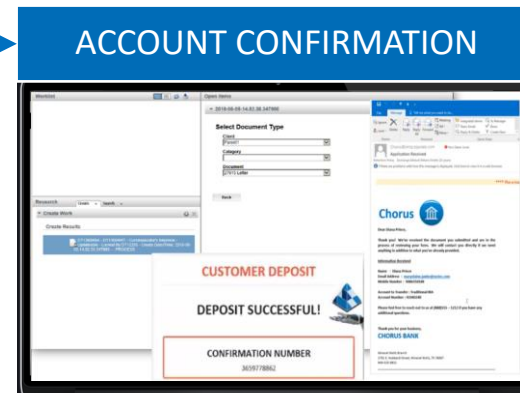
Monitor, orchestrate and optimize **end-to-end journey**



Automate and augment work for **better, faster results**



Automate data-sensitive tasks **responsibly**



Keep customers informed **automatically, instantly, continuously**



A delighted Diana is on the path to a financially secure retirement!