Using Robotic Process Automation + AI to Impact Business : An American Fidelity Case Study

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Ui Path 🤖 DataRobot

Speakers

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"Where else can you start and get a one-year return on your money. The big success comes when you tie your RPA to your analytics and your RPA analytics to your data science"

Michael "Chet" Chambers
Former Senior Director of Innovation @ HP
Current Chief Evangelist at UiPath

RPA improves productivity and lays the groundwork for AI

- Robotic process automation (RPA)—typically used to automate structured, back office digital process tasks — is a key part of many digital transformation strategies.

- RPA lays the groundwork for machine learning and more intelligent applications. Goal is to integrate RPA + AI: Bots that make decisions or interact with humans involving machine learning
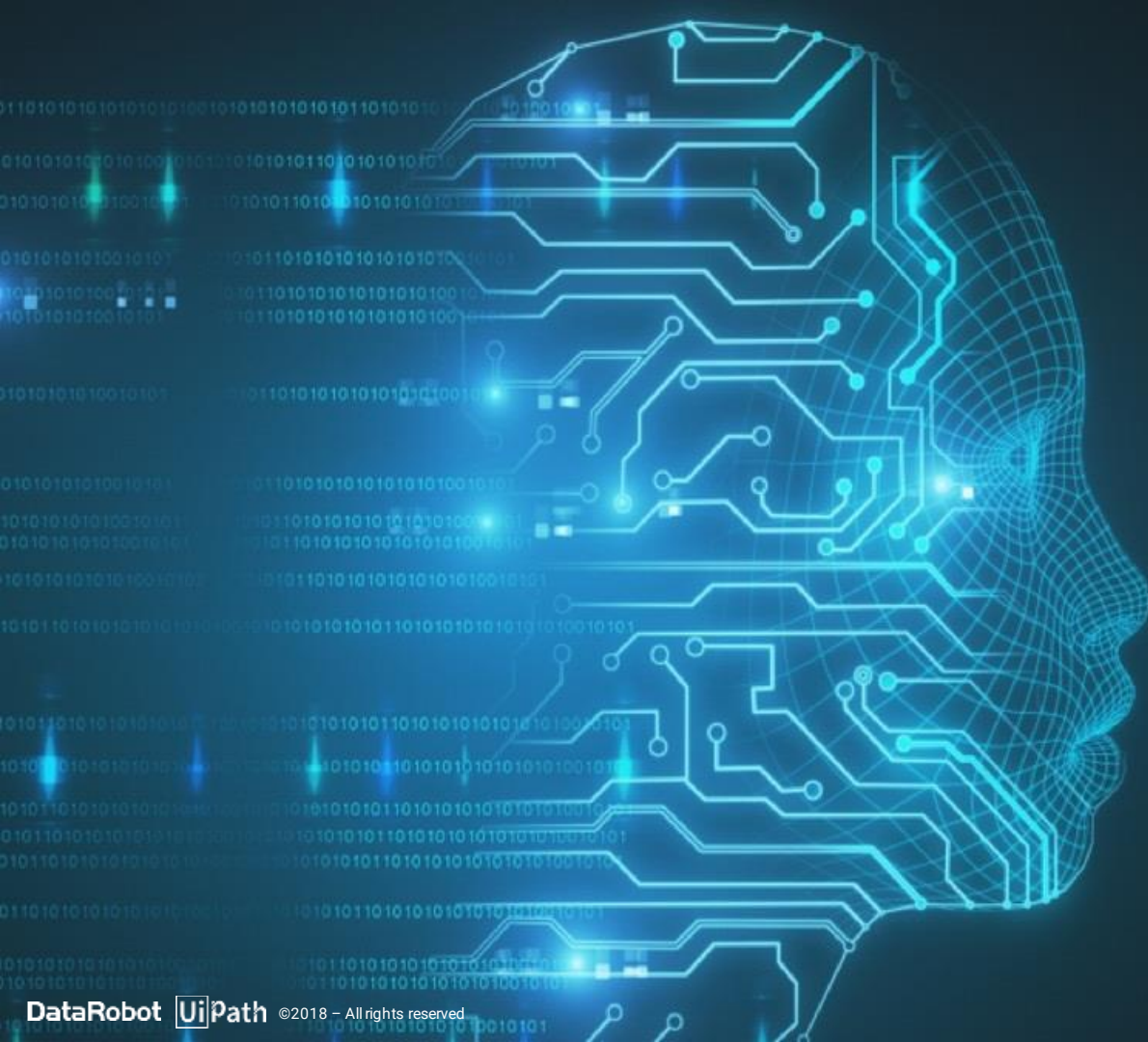
Why Robotic Process Automation + AI Matters?

The Role of RPA and AI in Process Automation

RPA

Systems Based on Rules

- **Automates "As-Is" tasks**
  - Bots that access legacy system data, filling in web forms, copy data from one system to another etc.
- **A key part of many digital transformation strategies**
- **Lays the groundwork for machine learning and more intelligent applications**
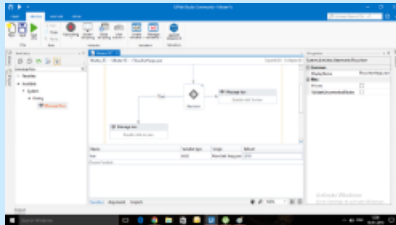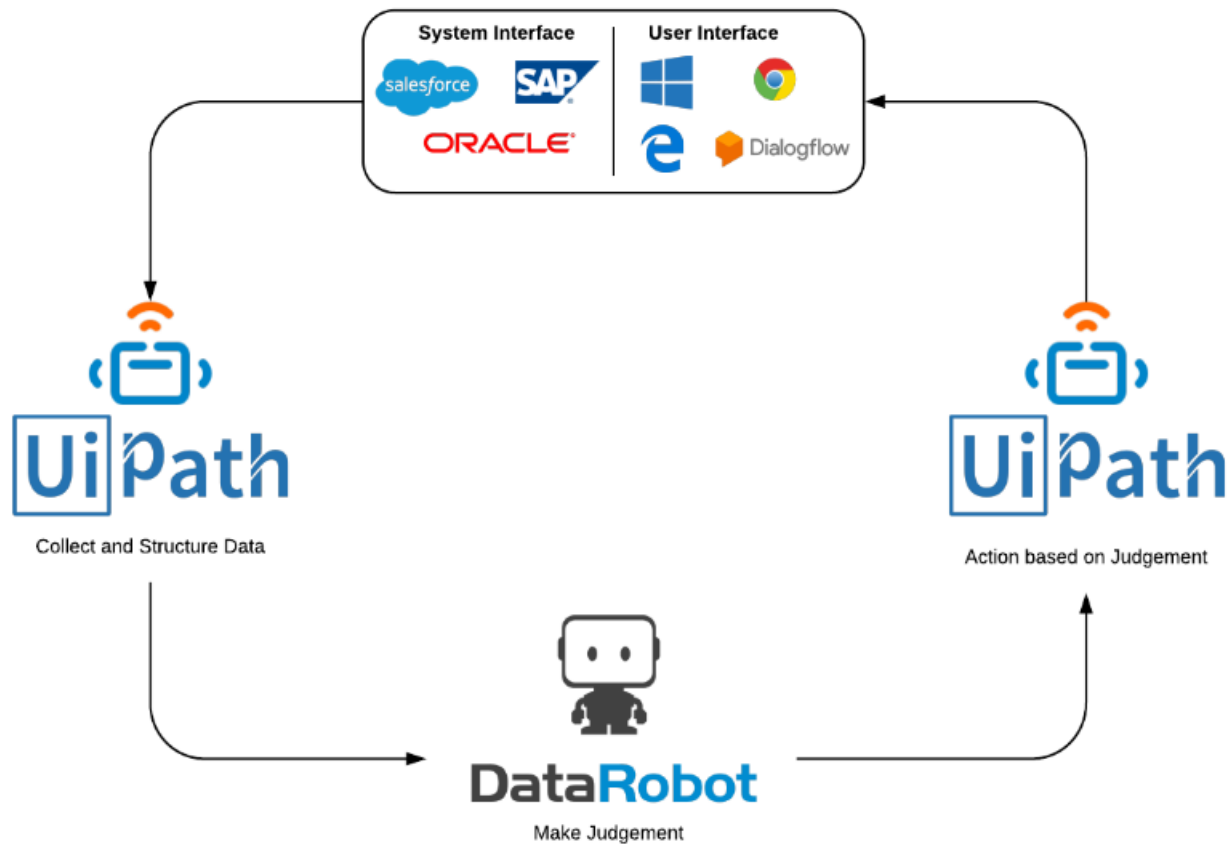

RPA + AI (ML)

Systems that Learn

- **AI Learns to mimic and improve processes based on data gathered within the RPA workflow**
- **Bots that make decisions faster or interact with humans involving machine learning**

Process Driven

AI Driven

DataRobot + UiPath

Demo

The American Fidelity Story

About American Fidelity

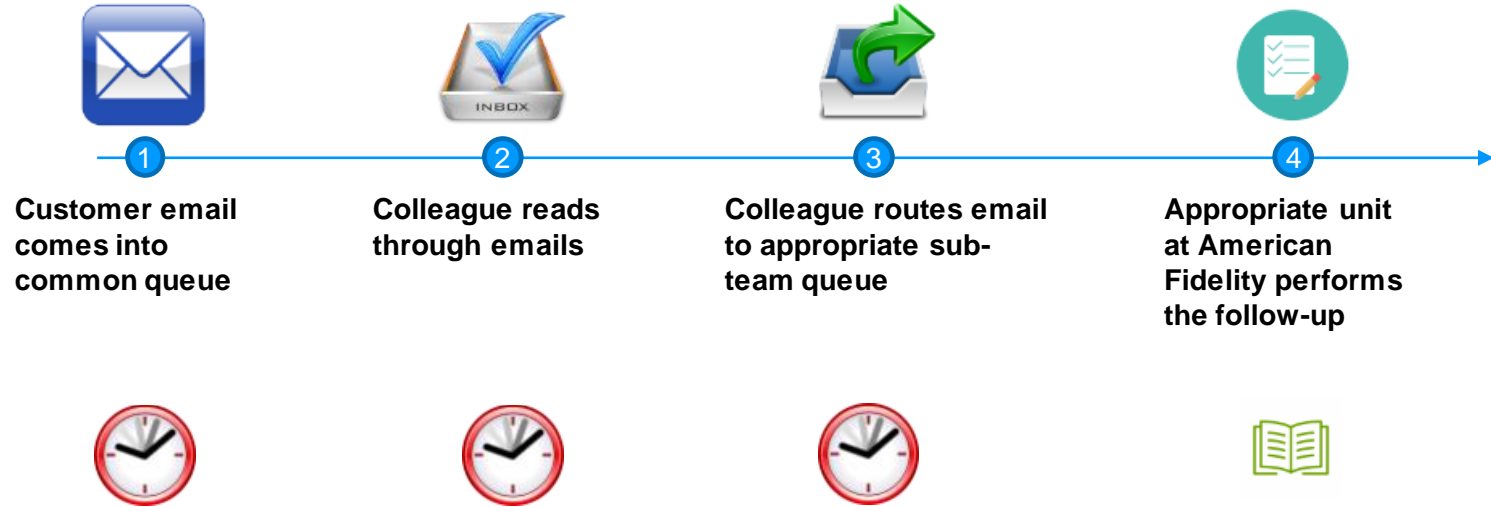**1**
MILLION +
active policy holders

9
THOUSAND +
employer groups

55
YEARS
in business with more
than 1,700 employees

The Challenge

1. Customer email comes into common queue

2. Colleague reads through emails

3. Colleague routes email to appropriate sub-team queue

4. Appropriate unit at American Fidelity performs the follow-up
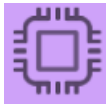
The Solution

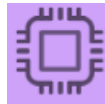| 1	2	3	4
UiPath Robot reads incoming email queries	UiPath Robot sends to DataRobot to automatically create a machine learning model to classify the request	DataRobot cleans, labels the data and classifies the request, then routes the request to the appropriate channel for follow-up	Appropriate unit at American Fidelity performs the follow-up resulting in improved customer service
RPA	RPA	AutoML	Result

The Benefits

- Significant reduction in email communication turnaround time

- Proof of Concept that any of our legacy (or modern) systems can be AI enabled

- Freed up staff to take more phone calls

- Happy customers

mAInframe

The Backstory

- **Started with simple keywords using RPA only**
  - Realized that wasn't going to work

- **DataRobot model took less than two hours to find best-fitting algorithm**

- **Most time consuming part was getting the training data**
  - Had historical incoming emails and which team replied
  - 2 columns of data – email text and team that responded to customer

- **Turned skeptics into believers**

- **Easy to get into production**
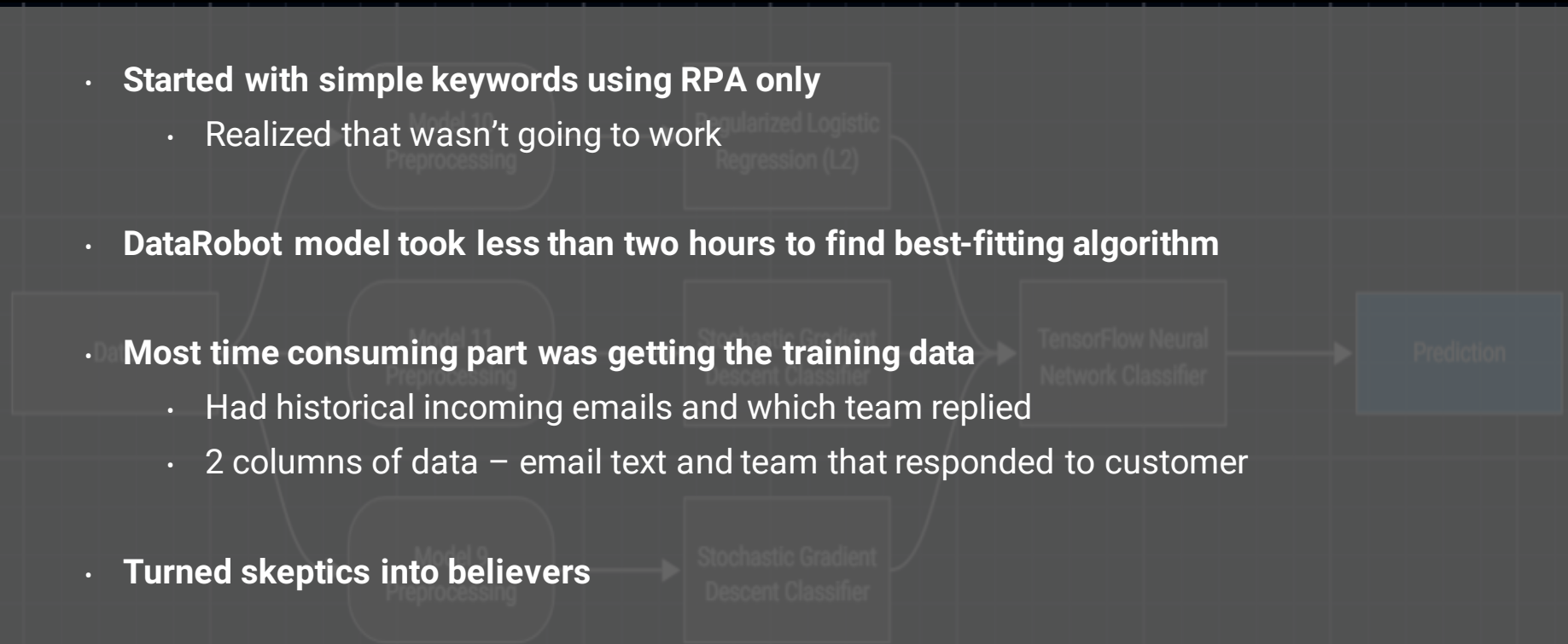
Summary

Gain Efficiency and Accuracy

- Let bots handle repetitive and mundane tasks or scale human tasks

Enhance the Rules-Based Process

- Increase worker performance, reduce operational risks, and improve response times

End-to-End AI-Driven Process Automation

- Humans, robots, and systems working together to make smarter decisions outside of the defined rules

Q&A

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