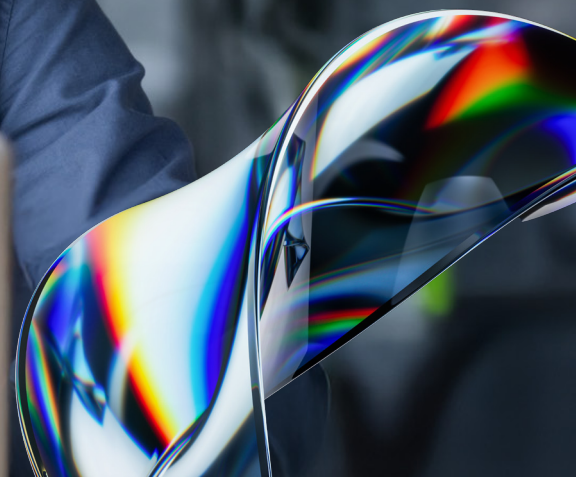
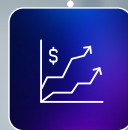


BROCHURE

From RPA to APA

Agentic Process Automation for
Financial Services



Financial services organizations face growing pressure to do more with less. Agentic Process Automation (APA) is how leading organizations are responding.

Where RPA automated 20 to 40% of tasks, APA pushes that to 60 to 80%, extending automation to complex, long-running processes that rule-based bots could never reach.

As an APA Certified Advanced partner, NuSummit and Automation Anywhere are helping financial services organizations make that shift.



The Need for APA in Financial Services



Missing domain specific view.



Delays due to manual data entry.



Many resources dedicated to maker and checker roles.



Limited automation scope due to restricted OCR capabilities.



Lack of Intelligent decision making and workflow routing.



Lack of contextual understanding.

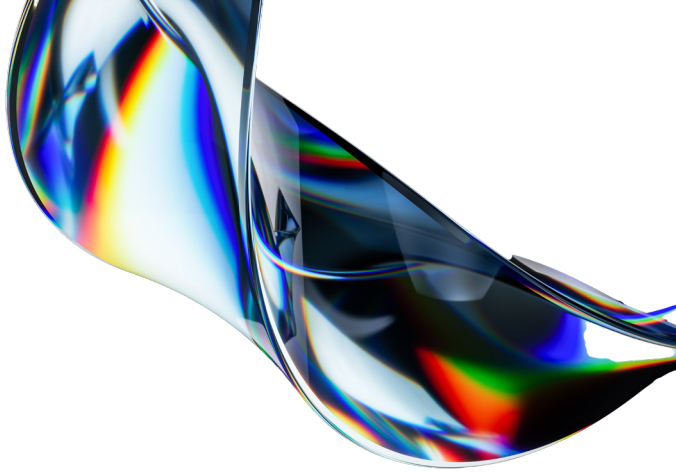


Time-consuming processes of reading templates and formats.



Tedious document management with a mix of hard copies and digital documents.

These are exactly the challenges where the move from RPA to APA makes its case. Where RPA handles structured back-office tasks, APA brings AI agents into the mix, capable of reasoning, deciding, and acting across the front, mid, and back office.



APA Use Cases for Financial Services



Loan Processing

Document verification, compliance checks, and eligibility determination are all handled by AI agents. What took 6 hours now takes 45 minutes, with a 20% NPS improvement and 45% increase in loan closing rates.



Invoice Processing

End-to-end invoice and payment workflows, with humans stepping in only for final approval. Turnaround moves from weeks to hours.



Insurance Claims Processing

AI agents manage intake, validation, and straight-through processing, cutting multi-day claims cycles to hours and freeing teams to handle exceptions.



Prior Authorization

Form completion, payer communication, and medical necessity validation are all automated. A process that took days now takes under 2 hours.



KYC and Onboarding

Handwritten forms, scanned IDs, Aadhaar, PAN, passport copies, extracted, validated, and processed accurately, at speed.



Bank Account Opening

Application forms, ID proofs, and salary slips are largely automated end-to-end, with exceptions routed to human review.

NuSummit APA Services

Built on Automation Anywhere's APA platform and NuSummit's deep financial services expertise, our offerings span the full automation stack:



AI-Powered Document Processing

Accurate extraction from scanned images, handwritten forms, and PDFs, well beyond what traditional OCR can handle.



Domain Centric AI Process Agents

Purpose-built for financial services workflows, reasoning, and acting across systems without human intervention at every step.



Self-Healing Automation

AI that writes and self-repairs automation, significantly reducing build and maintenance effort.



Co-pilot Collaboration

Humans brought into the workflow at the right points, via co-pilot capabilities embedded in the tools they already use.



AI Governance and Security

Real-time monitoring, PII masking, traceability, and audit, built in, not bolted on.



Aadhaar Masking and Identity Verification

Facial recognition, anti-spoofing, signature matching, and Aadhaar masking for Indian financial services compliance.

Why NuSummit



APA Certified Advanced

NuSummit is an Automation Anywhere APA Advanced certified partner, demonstrating strong expertise in agentic automation delivery.



Value Added Service Partner

NuSummit is recognized as a Value Added Service partner by Automation Anywhere. These certifications are provided based on the actual client responses to the implementation & other services rendered by the partner.



25+ Years in Financial Services Domain

We understand the regulatory, operational, and technology landscape that financial services organizations navigate every day.



300+ Clients Worldwide

Including 22 Fortune 500 companies, across banking, insurance, and capital markets.



3,000+ Professionals

With on-ground delivery capability across India and global markets.



End-to-End Ownership

From process assessment and bot development to AI agent deployment and ongoing governance, we own the outcome.



Built for Scale

Our engagements don't stop at pilots. We help organizations move from fragmented automation to enterprise-wide impact.

Case Study

Client

Claims Processing
Automation for India's
Leading Insurance
Company



Business Need

Our client, India's leading insurance provider, wanted to modernise their claims process. Their key objectives:

- Use automation to drive transformation across claims.
- Handle post-office-hours claims with quick turnaround.
- Reduce delays in customer service and improve TAT.
- Cut turnaround time for reconciliation.
- Reduce operational costs.
- Remove dependency on human intervention where possible.
- Enable straight-through processing for high-volume transactions.
- Stay compliant with regulatory requirements.

The NuSummit Solution

Working with Automation Anywhere's platform, NuSummit deployed a Agentic solution powered by LLM's to manage dockets and scanned policy documents. The solution created a single source of truth for claims data, enabled intelligent reporting, and allowed adjusters and examiners to work from consistent, data-driven inputs, at scale.

What started as an RPA-led initiative has since evolved, with AI agents now taking on more complex decision-making within the claims workflow, reducing manual touchpoints further.

Benefits Delivered

- Significant improvement in client satisfaction.
- TAT per claim reduced from 7 days to 2 days.
- Reduced resource costs with better employee utilization.
- Up to, 60-65% claims directly serviced by AI agents.
- 24/7/365 claims availability, with first response in under 5 minutes.

From RPA to APA

RPA gave organizations a strong foundation, automating repeatable, rules-based tasks and delivering tens of millions in savings. APA builds on that foundation, bringing AI agents into complex, multi-step processes across systems and teams.

NuSummit and Automation Anywhere are helping organizations make this journey, not by replacing what already works, but by building intelligently on top of it.

Learn how NuSummit and Automation Anywhere can support your APA journey.

About NuSummit

NuSummit is a global technology leader in AI-led digital transformation, specializing in applications, data, analytics, cloud, and cybersecurity. With over 300 clients worldwide, including 22 Fortune 500 companies, NuSummit supports organizations across industries. Our core expertise lies in banking, insurance, and capital markets, where we offer specialized solutions for these sectors.

With over two decades of experience and 3,000+ professionals, we deliver AI-driven, end-to-end solutions that integrate advanced cloud infrastructure and cybersecurity. Certified to top industry standards and backed by a robust partner ecosystem of hyperscalers and niche innovators, NuSummit is a trusted partner for secure, impactful digital innovation.

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