

**Case Study: Intelligent Automation /Banking**

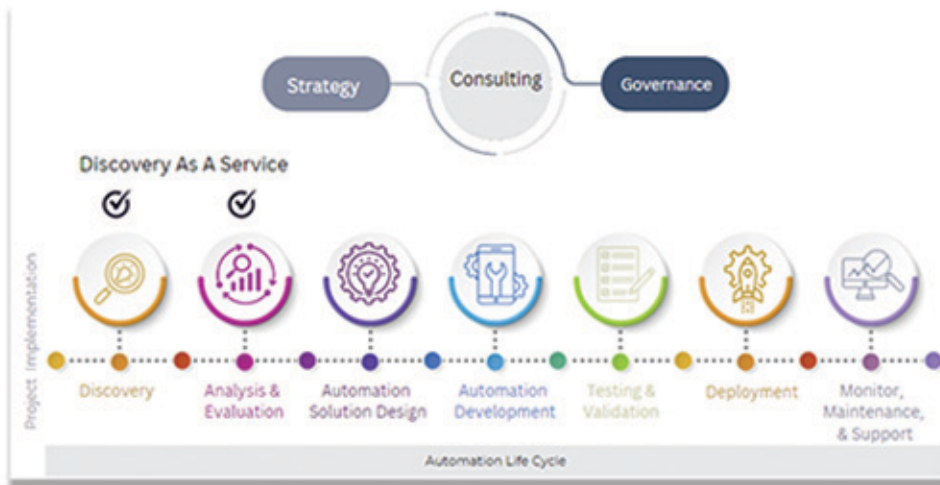
# Achieving \$1M in Savings through RPA Driven Loan Processing Transformation

## Business Challenges

A reputable bank faced challenges in streamlining its loan processing and mortgage workflows, particularly in the areas of reading loan documents and updating internal and external applications. With increasing manual effort involved, the bank also anticipated upcoming challenges based on the Mortgage Bankers Association's 2025 forecasts for mortgage origination volumes. To address these issues, the bank sought to automate these processes using RPA. The bank partnered with Primus to leverage its Discovery as a Service, identifying automation opportunities within the loan processing and mortgage closing functions.

## What We Did

Primus successfully utilized Discovery to uncover automation opportunities within the loan process and mortgage closing functions. This initiative highlighted areas where RPA and Intelligent Document Processing could streamline workflows, significantly reducing reliance on manual processing. Leveraging PrimeOne, Primus Discovery Specialist identified annual savings exceeding 5000 hours with a 5-year cumulative ROI totaling \$1M. With the projected mortgage origination volumes in 2025, these savings are expected to grow substantially.



## Business Benefits

- **Accurate Process Identification:** RPA Discovery as a Service uses advanced analytics and process observations to identify key processes for automation, ensuring the bank targets impactful tasks.
- **Prioritization for Maximizing ROI:** The service prioritizes automation opportunities based on complexity, volume, and business value to maximize ROI and efficiency.
- **Accelerated Automation Implementation:** The discovery service accelerates automation by reducing manual assessments, speeding up the entire process from identification to implementation.
- **Improved Governance and Compliance:** The service ensures RPA compliance by providing insights into cross-department processes and adhering to regulatory standards, reducing risks.
- **Data-Driven Decision Making:** RPA Discovery as a Service provides analytics to help organizations make informed decisions on RPA deployment, track performance, and drive improvements.

## Technologies Used

PRIME  ne



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## **About Primus**

Primus is a trusted technology solutions leader, dedicated to serving its partners for nearly 30 years with exceptional solutions that enhance business efficiency, increase productivity, and boost profitability. Our comprehensive suite of services includes Enterprise Data Solutions, Intelligent Automation Solutions, Cloud Engineering Solutions, and Staffing Solutions, catering to various industry verticals such as Healthcare, Insurance, Telecommunications, Logistics, Food & Beverage, Media, Automotive, Real Estate, Manufacturing, Banking & Finance, and Energy.

## **About the Primus Intelligent Automation Practice**

At Primus, our IA Practice leverages advanced technologies to empower organizations in their digital transformation efforts. By leveraging cutting-edge tools and solutions, we help businesses streamline operations, enhance process efficiency, drive innovation and deliver measured impact and ROI to the business. Our expertise in Intelligent Automation and hyperautomation ensures that companies can navigate the complexities of digital change, achieving significant improvements in performance and maintaining a competitive edge in today's fast-paced market.

### **Our core Intelligent Automation technologies include:**

- **Robotic Process Automation (RPA)**
- **Business Process Mapping (BPM) & Task Mining**
- **Chatbot**
- **GenAI, Artificial Intelligence, and Machine Learning**
- **Intelligent Document Processing (IDP) and Optical Character Recognition (OCR)**



AICPA  
SOC 2 Type 2 report covering Security, Availability and Privacy



ISO 27001:2013, ISO 9001:2015



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