ALTILIA

intelligent automation _

Use case applications

Financial Statements Analysis to Enhance Corporate Customers Profiling

In the **banking industry**, AIA enables the automatic reading of Balance Sheets, Income Statements and Notes to Financial Statements to extract financial data, and to identify and classify derivative contracts. The data is used for corporate clients profiling and automatically create a summary report of target companies.

The *solution* automatically reads more than 50,000 financial statements per year, reducing analysis time, increasing the productivity of the sales department, and enabling a timelier response to sales opportunities.

Doc. Types: **1**   Extracted datapoints: **70**   Processed pages / year: **~5million**

Streamlined KYC Processes for loan Assessment Operations

In the **banking industry**, AIA enables to streamline KYC (Know Your Customer) processes for the evaluation of loan applications by automatically collecting personal earnings and personal identification data reported in the documentation submitted by applicants, and by automating their comparison with internal data sources, when available.

The *solution* cuts down the time of data entry operations, allowing the bank to handle more applications in less time and improving accuracy in evaluating loan applications.

Doc. Types: **11**   Extracted datapoints: **86**   Processed pages / year: **~35.000**

Enhancing ESG profiling with streamlined data integration

In the **banking industry**, AIA integrates data and information from a variety of unstructured sources (i.e., financial reports, sustainability reports, corporate websites, etc.) to create and maintain corporate ESG reports, for marketing and lending profiling purposes.

The *solution* involves the automatic import and reading of documents (of different types and formats) from external sources, integrating the extracted data with information contained in the bank's own databases and CRMs. This allows to increase the number of companies analysed, and to generate more detailed ESG profiles that consider more datapoints as reference.

Doc. Types: **4**   Extracted datapoints: **24**   Processed pages / year: **~30.000**

Automated Data Extraction for Commercial Credit Factoring

In the **banking industry**, AIA improves commercial credit factoring processes by automating the classification and extraction of target data from acquired credit files (i.e., invoice headers, invoice dates, order headers, order dates, etc.), for their evaluation.

The *solution* eliminates manual data extraction operations, increases productivity and improves credit recovery capacity, both in terms of volumes of credit files handled and in terms of value of the credit recovered.

Doc. Types: **4**   Extracted datapoints: **21**   Processed pages / year: **~150.000**

Enabling online payments of F24 (tax payment) modules via mobile App

In the **banking industry**, AIA enables the automatic reading of F24 forms (Italian tax payment form) via photos. By using Altilia technology, banks digital service providers can enable online tax payment of F24 forms via mobile App.

The *solution* automatically reads the F24 modules form photos and transfers the data to a SDK (Software Development Kit) to automatically fills in the data required to process the payment via mobile App. This enables banks to provide a simplified service to their customers, that benefits the overall user experience and improves the quality of service.

Doc. Types: **1**   Extracted datapoints: **30**   Processed pages / year: **~15.000**

Automated Data Extraction for NPL Portfolios evaluations

In the **NPL servicing industry**, AIA improves and accelerates the evaluations of Non-Performing Loan portfolios (NPLs) by automatically reading and classifying loan file documents with large-scale extraction of target data for the evaluation (i.e., creditor personal data, property owner data, cadastral data, etc.).

The *solution* makes it possible to automatically completing and enriching NPL information datasets (data tapes) used for portfolio valuations, thus drastically reducing times for information retrieval. This allows for a greater number of portfolios to be analysed and more accurate pricing assessments to be made, increasing the revenue margins of the credit servicing business.

Doc. Types: **8**   Extracted datapoints: **9**   Processed pages / year: **~ 130million**

Automated Data Capture for Insurance Claims Management

In the **Insurance industry**, AIA simplifies the management of claims for damages and judicial documents by automating documents classification and the extraction of relevant data for the procedures (i.e. notification dates, judge records, competent court, PEC certified email data, etc.).

The *solution* allows to handle a greater volume of insurance claims in a shorter time, increasing operational efficiency and ensuring greater accuracy for claims evaluations, while also preventing human error in data entry operations.

Doc. Types: **5**   Extracted datapoints: **21**   Processed pages / year: **~150.000**

Automatic Reading of Energy Bills to Streamline Contract Activations

In the **Energy and Utilities sector,** AIA automates the reading of specific end-user supply data (i.e., housing unit address, power meter ID, power output, etc.) contained in utility bills, to simplify contract turn-over procedures to new energy and gas suppliers.

The *solution* analyses photos or PDF scans of the bills of previous suppliers for processing the required information to fill in new contract activation requests in real time. This greatly simplifies the user experience, reducing the cost of processing the request, while ensuring the reliability and integrity of captured information.

Doc. Types: **2**   Extracted datapoints: **25**   Processed pages / year: **~25.000**

Automatic Reading of Activity Reports for Enterprise Asset Management

In the **Telecommunications industry**, AIA simplifies enterprise asset management of towers and audio-visual components for broadcasting, by automatically reading activity reports for installation, maintenance, and decommissioning operations.

The *solution* extracts target data of interest from activity reports and sends them to the invoice management system of the customer. The solution improves data quality by eliminating human errors in transcriptions and saves time for the invoicing, reducing response times to end customers.

Doc. Types: **3**   Extracted datapoints: **20**   Processed pages / year: **~ 1.000**

Streamlining of Cash Payment Recordings

For the **Energy and Utilities sector**, AIA simplifies the registration of payments made at front office counters by automating data entry operations with scans of payment slips.

The *solution* duplicates cash register transactions into the customer's ERP system, by automatically reading payment slip scans. This minimizes the risk of human error due to incorrect transcriptions and reduces the waiting time at the counters for front office customers.

Doc. Types: **1**   Extracted datapoints: **13**   Processed pages / year: **~15.000**

Automatic Data Extraction for Supply Chain Vendor Screening

To support **Procurement Departments**, AIA accelerates the processing of data and information submitted by new suppliers, streamlining the vendor screening process and helping organizations to select reliable, high-quality suppliers more quickly.

The *solution* automates the reading and extraction of data from suppliers documents (i.e., contracts, invoices, work execution certificates), reducing costs and time for evaluations, improving the accuracy and guaranteeing the high quality of the supplier screening process.

Doc. Types: **6**   Extracted datapoints: **22**   Processed pages / year: **~50.000**

Automated CVs Analysis for HR Recruitment

To support **HR Departments**, AIA simplifies and speeds up the recruitment process, by automating the reading of CVs and matching with the skills required for open job positions.

The *solution* automatically analyses CVs to find the best matchings between the stated skills of candidates and the needs expressed in the job description. This makes it possible to increase the number of processed CVs and to facilitate the evaluation of candidates, with shorter recruitment times.

Doc. Types: **1**   Extracted datapoints: **12**   Processed pages / year: **~3.000**

Automated Reading and Classification of Complaints for Customer Care

To support **customer care services**, AIA speeds up and simplifies the handling of customer complaints. By automating the identification, classification, and summarization of the subject matter of complaints, it can optimize the process and speed up response times.

The *solution* eliminates any manual activity in the classification procedures thus improving responsiveness. This brings benefits both in terms costs savings for customer care and increased quality of service.

Doc. Types: **1**   Processed pages / year: **~500.000**

Conversational AI Assistant for Individual Pension Advising

In the **Wealth Management indust**ry, AIA improves the accessibility to regulatory compliance information and to products documentation for wealth management consultants, allowing them to obtain accurate and timely information to support their end-client queries.

The *solution* involves a generative AI conversational assistant (AltiliaGPT) that answers questions made by consultants in natural language, by searching and elaborating the information contained within the client's document knowledgebase. This simplifies the work of consultants and allows to improve the quality of service for end customers.

Doc. Types: **10**   Processed pages / year: **~20.000**

Conversational AI Assistant for Internal Procedures

In **Manufacturing and Utilities industries**, AIA simplifies the access to business procedures for performing operational tasks (i.e., internal procedures for procurement, internal procedures for enterprise asset management) to speed up decision-making processes.

The *solution* involves a generative AI conversational assistant (AltiliaGPT) that answers questions made by internal users in natural language, by searching and elaborating the information contained within the client's document knowledgebase. This augments the responsiveness and accuracy of operations allowing for an overall increase in productivity.