



# HOW A LEADING ORGANIZATION AUTOMATED BULK CASE CREATION TO CUT PROCESSING TIME FROM DAYS TO MINUTES

Enhancing Operational Efficiency through an Automated  
Solution for Faster, Streamlined Workflow

# About the Customer

A leading global provider of business administration and compliance solutions, serving thousands of clients with high-volume, data-intensive service operations.

## Engagement Story

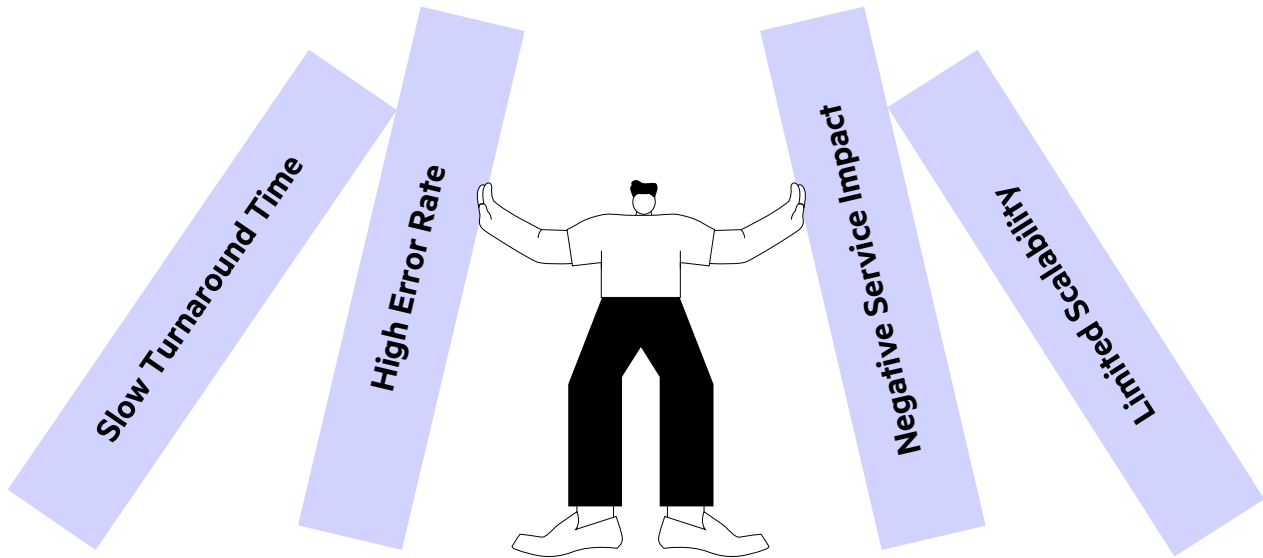
Manual case creation has become a major bottleneck in the company's service operations. Each request required multiple touchpoints and spreadsheet updates, leading to delays that often stretched from hours to several days. The process demanded continuous staffing, kept teams occupied with repetitive tasks, and increased the risk of error. These inefficiencies slowed response times and placed additional strain on already busy operations.

To address these issues and enhance operational efficiency, the client collaborated with EvonSys, a trusted low-code implementation partner, to develop and deploy an automated case creation system.

Manual case creation led to service delays and operational bottlenecks, while increasing the risk of errors.

# Key Business Challenges

The client faced numerous challenges, and the most pressing ones were:



## Slow Turnaround Time

The manual case creation from Excel files, with up to 10,000 rows dragged-out case creation, consuming days of effort.

## High Error Rate

The manual grouping and entering of data led to frequent mistakes and rework, consuming lots of effort and time.

## Negative Service Impact

The delays in case creation adversely affected the quality and timeliness of customer service.

## Limited Scalability

The teams struggled to keep up with the growing data volumes, limiting operational scalability.

Manual processes slowed operations, introducing errors and limiting the client's ability to scale efficiently.

# Desired Goals

- To reduce case creation time through automation.
- Improve accuracy by addressing manual entry mistakes.
- Enable scalability across multiple services.
- Deliver faster, better customer experience.

The client was looking for a faster, more accurate, and scalable solution to streamline case creation and improve customer service.

# Solution

The solution involved deploying a scalable system that replaced slow manual processes, addressing every key challenge the client faced:



## Automated Case Creation

Based on the provided Excel data, cases are created automatically through Pega case management. The system groups relevant lines into a single case without manual effort.

## Smart Data Validation

The system automatically checks errors in the uploaded Excel data and displays an error icon, which lists the properties in the specific line to resolve issues.

## Seamless Integrations

Multiple APIs were integrated to fetch additional data and validate information automatically, ensuring cases had complete and accurate details before creation.

## User-Friendly Portal

A user-friendly and interactive portal allows users to upload Excel files, visualize the data in table format, select multiple services for processing, and track the status of each case.

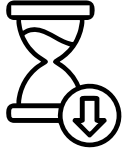
EvonSys built a solution tailored to the client's exact needs, blending automation, integration, and usability.

# Key Activities Involved

- Built automated workflows to process thousands of records quickly.
- Integrated with APIs to include additional case information.
- Created error handling mechanisms.
- Expanded automation to multiple services post initial rollout.

# Business Outcome

Following the implementation, significant improvements have been observed:



## Case Creation Time Reduction

What took 2-3 business days is now completed within minutes, which helps to improve operational efficiency.



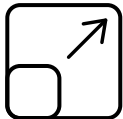
## High Volume Processing of Data

The system now handles Excel files with 10,000+ rows in a fraction of the time.



## Improved Accuracy

With automated validations and clear error reporting, the risk of manual data entry mistakes is significantly reduced.



## Built for Scale

Initially launched for a single service in just 2 months, the solution has already been extended to three distinct services, with more in the pipeline.

A high-impact solution delivered within two months, continuously expanded to serve multiple services.

# Simplify complex processes with EvonSys

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