

Automating the Enterprise - NAB's Unique take on Case Management

## WHAT IS NAB UNIVERSAL WORKFLOW?

What is it?

As a result of changing customer expectations, competitive dynamics and regulatory risk, National Australia Bank (NAB) has embarked on a multi-year transformation program focussed on making itself simpler and faster.

A key requirement within the program is to transform human centric work in to a market leading digital process automation capability. NAB Universal Workflow (NUW) is a framework of re-useable enterprise components that can be configured by the business and deployed in to production to meet their workflow needs within weeks.

## **Enhanced Capabilities**



## Improved Experience



"I have full confidence and understanding of how and when my request will be actioned."



Team Managers

"I finally have a view of all the work in my business and how we are meeting our customer's expectations."



"I can rely on the system to prioritise and fulfil my customer's needs."

Key Benefits

15-20%

Uplift in efficiency



Reduced customer follow up enquiries



Customer Satisfaction

## WHAT ARE THE KEY FEATURES OF NAB UNIVERSAL WORKFLOW?

## **Key Features**

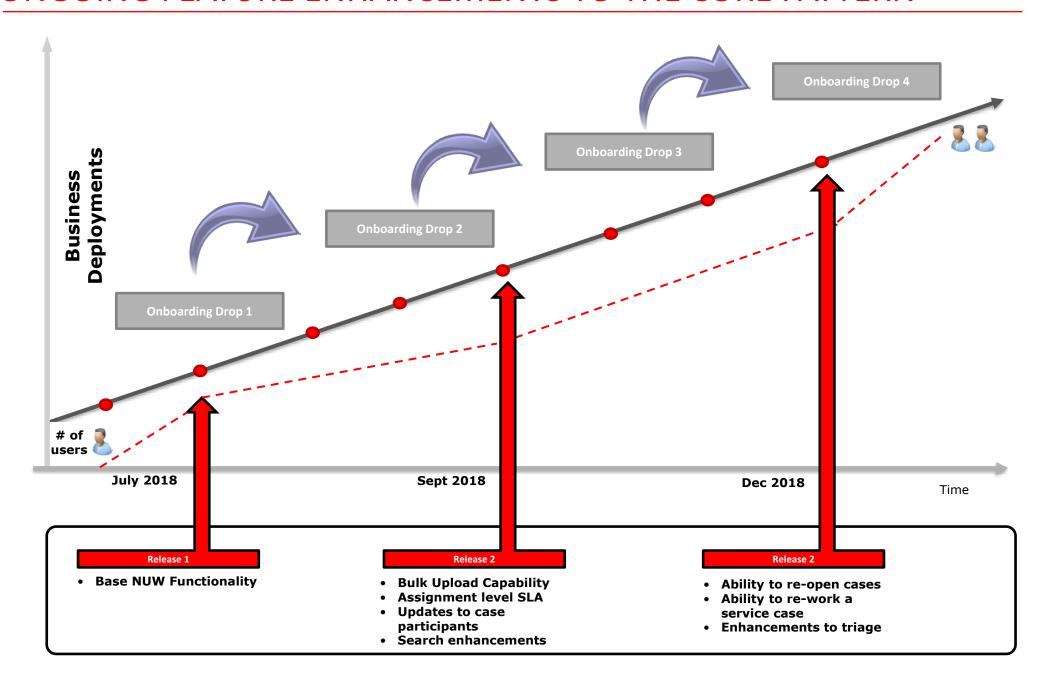
- ✓ Natural Language Processing with machine learning: Perform automated classification of email requests into cases.
- ✓ Dynamic processes based on pre-configured conditions and business rules.
- ✓ Configurable data model per case type.
- ✓ Real-time operational reporting
- ✓ Configurable SLAs set at overarching case and underlying step level.
- ✓ Integrated Robotic Automation including RPA and RDA
- ✓ Auto case creation via multiple channels including email, API etc.
- ✓ Bulk case creation of business unit specific cases supported via csv template upload.
- ✓ In-built correspondence management capability.
- ✓ Single sign-on.

#### THE INTELLIGENT VIRTUAL ASSISTANT

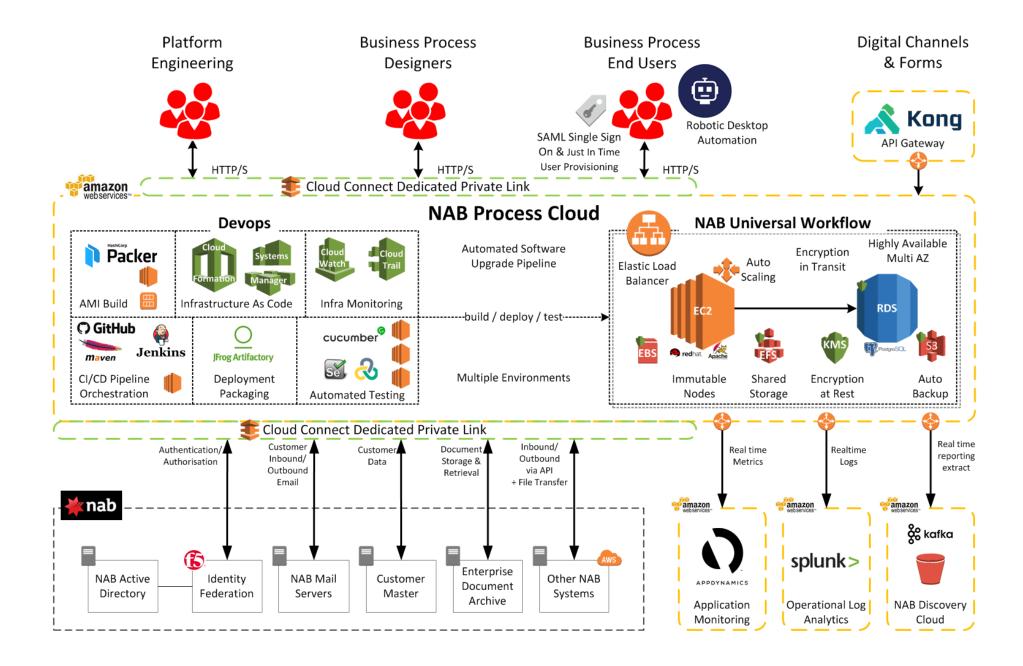
Eight Business Units In Production Using the Intelligent Virtual Assistant:

- **✓** Nineteen email listeners live in production.
- ✓ Over thirty four thousand emails processed by IVA in Universal Workflow to date.
- ✓ Over 75% of service cases auto classified leveraging the natural language processing (NLP) model without human intervention.
- ✓ Business teams are able to update and maintain their own NLP models which is constantly improving the auto classification rates.

## ONGOING FEATURE ENHANCEMENTS TO THE CORE PATTERN



## PLATFORM CLOUD ARCHITECTURE LEVERAGING AWS



## A BUSINESS DELIVERY MODEL

- ✓ Our NAB business units complete an engagement & demand assessment which determines suitability. If assessed as a fit for Universal Workflow, the team handover the initiative to a dedicated onboarding squad.
- ✓ The Onboarding squad follow a predefined process which generally takes between 8-10 weeks.

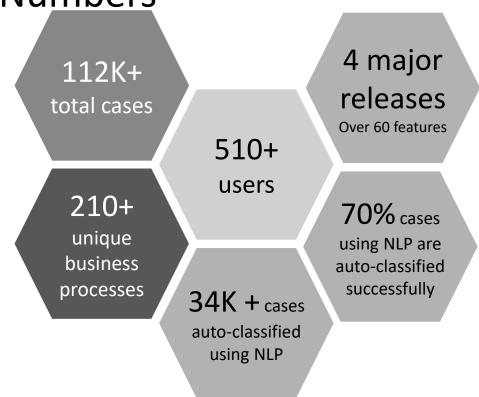
Design	Configure and Test	Test Sign Off	Go-Live	Hypercare
<ul> <li>Finalise         Scope</li> <li>Define key         parameters,</li> <li>Confirm team         roles and         capabilities</li> </ul>	<ul> <li>Configure workflows</li> <li>Create screens and data capture</li> <li>Configure SLAs, urgency values, and prioritisation requirements</li> <li>Configure correspondence templates</li> <li>Use Direct Capture capability to allow instantaneous showcase of configuration to the business</li> </ul>	<ul><li>System     Testing</li><li>User     Acceptance     Testing</li></ul>	<ul> <li>Confirm go-live and support plan</li> <li>Promote configuration to production</li> </ul>	<ul> <li>✓ On premise support post go-live for 2 weeks</li> <li>✓ Transition to BAU support</li> </ul>
	+ Change planning and training  + Reports solutioning (standard out of the box reports and customisation)  + Communication management			
1 – 2 weeks	Sprint cycle = 2 weeks	2 – 4 weeks		2 weeks

## ACHIEVEMENTS AND BUSINESS ROLLOUT

- √ 60+ successful deployments into production from 28th May to 31<sup>st</sup> Jan at an average of 1 deployment every 3 days.
- ✓ Completed pilot deployment of Pega Robotics (RDA) opportunity for NAB Payments Operations.



# Universal Workflow By the Numbers



# **Future Roadmap**

FY '19 Business Rollout 50+ opportunities in the pipeline including: **Business Bank Financial Crime Services Business Lending Home Lending** and many more... Group Tax Weekly HR feature Business releases Risk and Bank Policv Managem 20+ teams ent Australia wide Retail Operations