



Email Management

The Challenge

Our customer, a financial services organisation was facing significant challenges in managing their email communications effectively. With over five active email addresses, they were receiving hundreds of client emails daily.

Some key pain points included:

- **Duplicate Emails:** Clients often sent the same email to multiple addresses, hoping for faster response times. This led to duplicated effort and processing time, as multiple teams addressed the same queries.
- **Misrouted Emails:** Clients frequently sent emails to incorrect addresses, bypassing the intended team, which caused delays and inefficiencies. Often, teams that were not responsible for certain types of queries were sent emails from clients simply because the client knew this team responded faster.
- **Manual Processing:** Many employees were involved in reading, routing, and signposting emails, resulting in significant time spent on administrative tasks rather than higher-value work.
- **Lack of reporting:** The management teams did not have an overview of the type of client support emails, or how long it was taking to respond back to client emails.
- **Customer service:** The organisation was concerned that it was not giving their client's the services that were expecting.

These inefficiencies were costing the business in terms of impact to the brand, a significant amount of manpower time, resulting in lost productivity and inflated operational costs.

Our Solution

iThink365 introduced a custom AI-powered Email Processing Agent to transform the way the financial services organisation handled incoming email communications. The solution involved the following key components:

- **Duplicate Email Detection and Filtering:** We implemented an AI engine capable of detecting and discarding duplicate emails. By recognising instances where the same email was sent to multiple addresses, the system ensured only one copy was processed, cutting down on unnecessary effort.
- **Intelligent Email Categorisation:** Using advanced Natural Language Processing (NLP) techniques, we trained the AI agent to analyse the content and sentiment of each email. Through prompt engineering, we tailored the AI to recognise specific categories of queries as defined by the client. This enabled the system to accurately tag and categorise each email, streamlining how it was handled.
- **Automated Routing via Power Platform:** We integrated the AI agent with Microsoft's Power Platform suite. Once categorised, emails were automatically routed



to the correct department or team based on the tagged category. This eliminated the need for manual signposting and reduced the delays caused by misrouted emails.

- **Email Management Reporting:** The AI agent provided reporting data on the emails being received, their sentiment and crucially provided how long before an email was responded to.

Results and Benefits

By implementing this AI-driven solution, we achieved the following outcomes for the client:

- **Increased Efficiency:** Duplicate emails were automatically removed from the process, eliminating redundant effort. This led to faster response times and a more streamlined workflow.
- **Reduced Operational Costs:** The significant reduction in manual processing meant fewer staff hours were required for handling emails, which translated to substantial cost savings.
- **Improved Email Accuracy:** The AI agent ensured that emails were categorised correctly and routed to the appropriate department, reducing the miscommunication and delays caused by incorrect email handling.
- **Enhanced Client Experience:** Clients received more accurate and timely responses, as emails were directed to the right team without delay, improving overall client satisfaction.

Conclusion

This case study demonstrates how iThink365 helped a Financial Services organisation transform their email processes using an AI-powered solution. By leveraging intelligent email categorisation and the automation capabilities of the Power Platform, we were able to save the client significant time and operational costs, all while improving their client's experience.

If your organisation is facing similar challenges with managing email workflows, iThink365 can help tailor an AI-driven solution to streamline your processes and boost productivity.