**Building a Smart Automation Ecosystem**

One of the biggest global suppliers of asset management and insurance is Generali. It was founded in 1831 and now has operations in 50 countries, employing more than 72,000 people to serve 61 million consumers.

Generali Group unveiled a new digital strategy two years ago to concentrate more on their core business. Agile, Innovation, Customer Relationship Management (CRM), Data Analytics and Artificial Intelligence (AI), and Smart Automation make up the five pillars of this strategy. The Generali Group headquarters oversees and directs the Smart Automation program while collaborating with groups within the various country offices and business units. In a few local business units, Generali began collaborating with UiPath on several automation efforts and prototypes at the end of 2016.

**Overview**

In co-leadership with Generali Italia, Generali Group Head Office established a center of excellence (CoE) intending to expedite the convergence of the Smart Automation strategy and execution. The CoE is made up of a small group of diverse professionals from various nationalities and backgrounds who get together to discuss various automation use cases, work on scaling global assets, and serve as a unifier and accelerator for company-wide Smart Automation efforts.

The CoE actively searches for the best technology available, identifies group-preferred solutions in coordination with specialists from business units, and seeks out the most promising procedures that can be automated. Additionally, they aim to increase understanding of automation among all of the group's business units, support services, and markets.

**Establishing a robust technological ecosystem**

As time has gone on, the business has begun to increase the use of robotic process automation (RPA), realizing that when combined with other technologies, RPA served as the foundation for genuinely Smart Automation. The ability to mimic human actions, such as clicking on screens, downloading papers, and—most importantly—identifying pertinent information—was essential to this trip.

Generali discovered that UiPath robots could click and access programs, and when integrated with additional technologies such as computer vision and natural language processing, they could now gather data and make informed judgments based on that data. RPA was effective on its own, but it only has much greater potential when combined with an ecosystem of other technologies. Optical character recognition (OCR), which enables them to scan and interpret the printed text as well as handwritten material, is another technology that RPA collaborates with.

As a result of advancements in artificial intelligence (AI), UiPath robots can now read papers, filter out irrelevant material and background noise, and extract the necessary information. The processing of forms is one instance of how these synergies produce tangible outcomes. Customers send Generali a variety of forms in various formats, many of which are hand-filled. The Robots can extract the material using AI, OCR, and natural language processing (NLP), and they can then suggest possible actions to the operator after doing so. Following the extraction and validation of the data, AI will clean the document, rotate photos as necessary, reduce noise, and identify outliers before presenting it to a human with a recommended course of action.

**Automating the easy tasks**

The 2020 COVID-19 pandemic sowed the seeds for the creation of "a robot for every personTM." During this time, the Smart Automation CoE and UiPath collaborated to create fresh ideas for how they could support the Generali team during a moment of significant stress and upheaval.

Their solution was to provide staff members the ability to design their automation. So they chose to concentrate on smaller, simpler operations that are repetitious rather than major processes that would produce much higher savings but would take more time. They had to make sure that workers had the necessary knowledge and abilities, and they had to make sure that the technology was in place to support this program. The Generali Smart Automation CoE chose to use UiPath StudioX, a simpler but more user-friendly version of the program its developers used so that staff members without any programming knowledge could construct their automation.

The CoE searched for a small group of co-workers keen to participate in the first pilot and learn more about automation. Then, with the help of UiPath Professional Services, a training plan was developed, resulting in a three-week training program that lasted two hours each week, followed by two months of on-the-job training. This setup has made it easier for staff members to recognize straightforward tasks that they can later automate.

**Conclusion**

Employees might create automation that would, for instance, download email attachments, copy and paste data from files, or move documents across folders. Most crucially, this has given Generali employees control over automation, creating the groundwork for future citizen developers to be able to construct their automation that other employees might potentially use in the future even if they did not create them themselves.

"Everyone is aware of RPA's potential and how it supports our Smart Automation goal. We want to advance this technology and promote its advantages across the organization.”