

# ISSA



**SYMPOSIUM 19**

**23 – 25 May 2018**

## **Feedback Breakout Group 'Robotics / Artificial Intelligence'**

**Dan Thieke, DTCC, 25 May 2018**

### Question 1

**What are the most relevant automation & robotics techniques for your organization and why?**

1. Robotics process automation (RPA)
2. Smart workflows
3. Machine learning
4. Natural language tools
5. Cognitive agents

#### **Answer:**

- RPA is most prevalent but there is a build-up to the more advanced technologies like AI/ML and cognitive agents.
- General consensus is that the first two items are less strategic versus the last three which provide more value-added opportunities.

### Question 2

**What is your perspective on automation & robotics versus other efficiency levers?**

1. Lean
2. Near- & offshoring
3. Outsourcing

#### **Answer:**

- Consensus was: A focus on Lean with more of an "onshoring" approach combined with RPA
- Provides a greater level of control for the business

### Question 3

**In which parts of the securities services value chain have you already seen and/or do you expect the highest impact from automation & robotics at your organization? What is the impact you have seen/expect?**

1. Clearing and settlement services
2. Custody services
3. Fund admin services
4. Corporate trustee services
5. Ancillary services
6. IT

#### **Answer:**

- RPA use cases span all of the different aspects of the value chain but it is largely driven by the scope of the business, volumes, level of prior investment and the nature of the process
- AI use cases could have a big impact on client satisfaction and revenue generation

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### **Recommendation from the Breakout Sessions**

ISSA should produce a summary of the Symposium discussions, which should not require the formation of a Working Group