

AI-Built SmartBots Help Centralize AP Operations at Brown & Brown

CASE STUDY SMARTVENDOR : AP HELPDESK

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SETTING THE STAGE

Brown & Brown markets and sells insurance products and services primarily in the United States, as well as in England, Bermuda, and the Cayman Islands.

Brown & Brown's retail segment provides property insurance relating to physical damage to property and resultant interruption of business and offers risk management and lost control surveys and analysis, consultation, and claims processing services.

The company's national programs segment offers professional liability and related package insurance products for professional groups.

Brown & Brown's services segment offers third-party claims administration and medical utilization management services.

BROWN & BROWN THE DETAILS

- 6th largest insurance brokerage globally
- More than 80 years in business
- 16,000+ employees
- 500+ agencies on the team
- 2024 Forbes Best Workplaces
- 2023-2024 Platinum Level Bell Seal for Workplace Mental Health

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An early adopter of Workday Financial Management, Brown & Brown's growth strategy focused on acquisitions. Consequently, each acquisition introduced new systems, processes, and supplier relationships into the existing payables framework, adding layers of complexity to an already beleaguered AP process.



INTRODUCING AUDITORIA

Brown & Brown needed to integrate their sophisticated Workday finance system into a manual and fragmented AP process. The outdated AP processes hampered the ability to collect and analyze AP data efficiently, and each new acquisition required significant effort to standardize operations under the shared services group.

With more than 20K active suppliers and 120K annual invoices, the manual processing of such high invoice volumes across five divisions and hundreds of locations was inherently inefficient and prone to bottlenecks.

Brown & Brown wanted an innovative approach that incorporated automation into the AP process. The transition to an automated approach would require technical integration and a cultural shift towards centralized processing and standardization across divisions and locations.

Brown & Brown identified Auditoria.AI's AP Helpdesk, with certified integration into Workday, as the solution to help centralize AP operations and consolidate processes to streamline AP workflows.

AP Helpdesk aggregated data from incoming emails in shared accounting inboxes, offering a consolidated data and task view for the Brown & Brown team. The AP Helpdesk SmartBots, AI-infused intelligent, finance-trained applications handled more than 90% of the incoming requests, executing authorized tasks and responding to questions.

FAST FACTS

- Centralized AP operations to streamline workflows and consolidate processes
- Reduced process workload by 70%+
- Increased speed, accuracy, and efficiency for AP teams

Auditoria's AP Helpdesk SmartBots processed AP mailbox emails via 24/7 inbox monitoring and autonomous contact verification. Intent detection was powered by Large Language Models and finance-specific Small Language Models, with AI-assisted request fulfillment and task resolution.

AP Helpdesk SmartBots also handled invoice submission intake, flagged duplicate invoices, and transferred new invoice files directly to Workday Financial Management.

AP Helpdesk Collaborative Mode human-in-the-loop (HITL) workflow empowered users to review, modify, and approve SmartBot processing outcomes, which included detected intents and SmartBot-generated replies. Insights on mailbox activity, detected intents, task handling, and more were available via the AP Helpdesk console.

THE LEVEL OF AUDITORIA'S INTELLIGENT AUTOMATION ALLOWED THE BROWN & BROWN FINANCE AND ACCOUNTING TEAMS TO CONCENTRATE ON ANALYSIS AND ACTION, WHILE ALSO CENTRALIZING AP OPERATIONS



REALIZING IMPACTFUL RESULTS

Brown & Brown's ongoing multi-year effort to centralize AP was a strategic move toward improving efficiency and control. It required change management, process reengineering, and system integration. Brown & Brown's automation leaders convinced divisions and locations to adopt a unified approach, addressing concerns related to autonomy, job security, and learning new systems and processes.

Brown & Brown saw value quickly through Auditoria's API-certified Workday connections and enterprise integrations, with minimal IT dependence, thanks to pre-built programming and best-in-class protocols. This gave their finance teams the ability to consolidate AP operations and improve speed, accuracy, and efficiency for their finance department operations.

Summary email extraction insights, such as intent detection, replies, and tasks, were displayed and exportable for Brown & Brown's team with SmartBot performance reporting to highlight the value and insights gained.

*"Finding the right technology business partners can help organizations **harness technology for improved operations...** Organizations that automate key functions will better endure business slowdowns."*

***Artificial intelligence is central to digital transformation,** allowing companies to gather data and perform repetitive tasks more efficiently."*



Andy Watts

Chief Financial Officer
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Brown & Brown
INSURANCE*

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ABOUT AUDITORIA.AI

Auditoria.AI is a ground-breaking SaaS solution that addresses the most pressing challenges of the finance office. Auditoria increases finance teams' speed, accuracy, and efficiency using AI-enabled SmartBots to automate redundant and manual back-office processes and derive greater cash position visibility.

Purpose-built for finance with GenAI, natural language technologies, Computer Vision, AI, and machine learning, Auditoria SmartBots integrate with systems of record and email boxes to streamline collections, optimize vendor management, and handle accounting inquiries using automation. By transforming these key functions, Auditoria improves the lives of finance and accounting professionals by applying technology to automate the routine, repetitive, and laborious parts of the finance function, freeing teams to perform higher-level business functions and more strategic initiatives.

The advanced software delivers generated AI-driven workflows and decision support across massive volumes of enterprise data, augmenting finance teams with intelligent automation to execute business processes, deliver rapid insights, and quickly respond to customer and vendor needs.

