Finland-Based Global Engineering and Service Company

Processes 40,000+ Contracts in 100 hours to Deliver a Smooth After-Sales Experience

Overview

Every day, millions of people across the world use escalators, elevators, automatic doors, and moving walkways manufactured by a global leader in engineering and services. The Finland-based giant operates in more than 60 countries and has a worldwide network of distributors that serves over 450,000 building owners and facilities management customers. Aside from product installations, the company also provides after-sales services based on the contract agreement, ensuring better customer retention and loyalty.

This organization opted for Astera ReportMiner, to automate its data extraction processes and enables after-sales team to withdraw coverage information from contracts and process claims accurately.

Business Case

Installing multiple elevators, moving walkways, and escalators in malls, airports, offices, hotels, and other types of commercial buildings requires a lot of planning and due diligence. To ensure smooth execution, the engineering and service company prepares physical documents, including contracts, that outline project details, deadlines, and terms and conditions for claims. Once the company and its customers reach an agreement, their legal team reviews the documentation before both parties sign it. Finally, the completed paperwork is converted into regular or scanned PDFs for digital recordkeeping and stored in the company's ERP system.

Due to its large global customer base, this engineering and service giant frequently receives claim requests for maintenance and servicing on broken or faulty parts. The after-sales team, comprising of a few paralegals, handles these requests and reviews each customer's case to determine the claims' validity.

However, coverage and exclusion information aren't readily available in a tabular format as it is buried within the legal verbiage of contracts. To retrieve this information, the paralegal team has to manually sift through entire agreements to find out whether a customer is for its under-warranty services.

Challenges

The leading international engineering and service corporation always emphasized its ability to deliver exceptional after-sales experience to customers. This customer-first mindset has allowed the company to build a stellar reputation while maintaining its position as an industry leader in the urban engineering sector. However, the complexity and costs involved in the claims management process are among the critical aspects that pose a challenge for corporation's position.

Since elevators, escalators, moving walkways, and other similar products have hundreds of moving parts, only some specific components were covered for repair, replacement, and maintenance services. In this scenario, the biggest challenge for this global leader in the elevator and escalator industry was extracting coverage and exclusion information from 40,000+ contracts manually. Each contract contained heavy legal verbiage that spanned up to 250 pages. It took anywhere between several hours to days for the paralegals to review each contract and draw out a synopsis for claim eligibility.

Due to the sheer volume of contracts and lack of resources, reviewing every document with precision and verifying customers' claims would've taken the team thousands of man-days. They needed a solution that could automate data extraction and produce the information in a structured format.

Astera Solution and Results

After thoroughly searching the market, the corporation decided to opt for Astera's professional services to design and implement a custom solution to meet their data extraction and reporting needs.

Building a Custom Solution with Astera's Engineers

Astera's professional services team worked with the company to track specific keywords and phrases related to various parts of its products found under coverage and exclusion sections in contracts. Since the information was scattered across various legal documents, the PDF files followed three different templates. Also, the batches contained both text-based and image-based PDFs, which the team standardized through OCR.

Using Astera ReportMiner, our engineers created three report models to extract from all PDF formats. They designed a workflow that used custom logic to run through batches of contracts for finding and extracting the predefined set of keywords and phrases. Using features like Pattern Match, finding those keywords in each document took only a few seconds. The final step involved loading the extracted data into an Excel file that presented the keyword data in a tabular format.

Astera
Enabling **Data-Driven** Innovation

40,000+ Contract PDFs Processed in Approx. 4 Days

At first, the international corporation's team ran the workflow on smaller batches of 50 and 100 documents to ensure that Astera ReportMiner generated the desired results. After the testing phase was completed, they exponentially scaled the process and began feeding batches of 1000+ contracts in a single go.

It took approximately 3-4 days (about 100 hours) to clear out the piled-up batch of 40,000+ contracts. The company uploaded the final Excel reports in its ERP system to make the coverage information available to all departments. Since the process is repeatable and customizable, it now takes them a few minutes to extract coverage information from new contracts and make accurate decisions on approving or rejecting claims.

The company has also substantially sped up and improved its after-sales services to keep people across the globe moving closer to their destinations in an effortless manner.

> **"What used to take us weeks now only takes a few days as we process over 40,000 PDF contracts of various claims in approximately 4 days with Astera ReportMiner" — Legal Analyst, Business Operations**

About Astera ReportMiner

Astera ReportMiner is a complete data extraction solution that is purpose-built to handle a range of unstructured data formats, including PDFs, PDF forms, TXT, PRN, RTF, XLS, and XLSX. It combines rule-based data extraction with an enterprise-grade ETL engine to help businesses streamline the ETL process to liberate data trapped in unstructured files.

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