



# The Future is Now: Agentic Automation and AI Governance

Powered by the SS&C Innovation Lab

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# SS&C AT A GLANCE

**38+**  
years in business

**27,000**  
employees

**20,000**  
clients

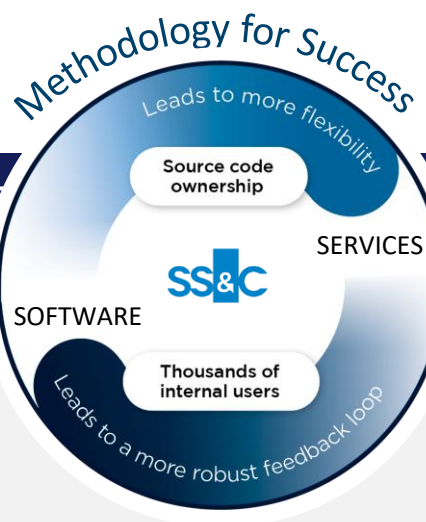
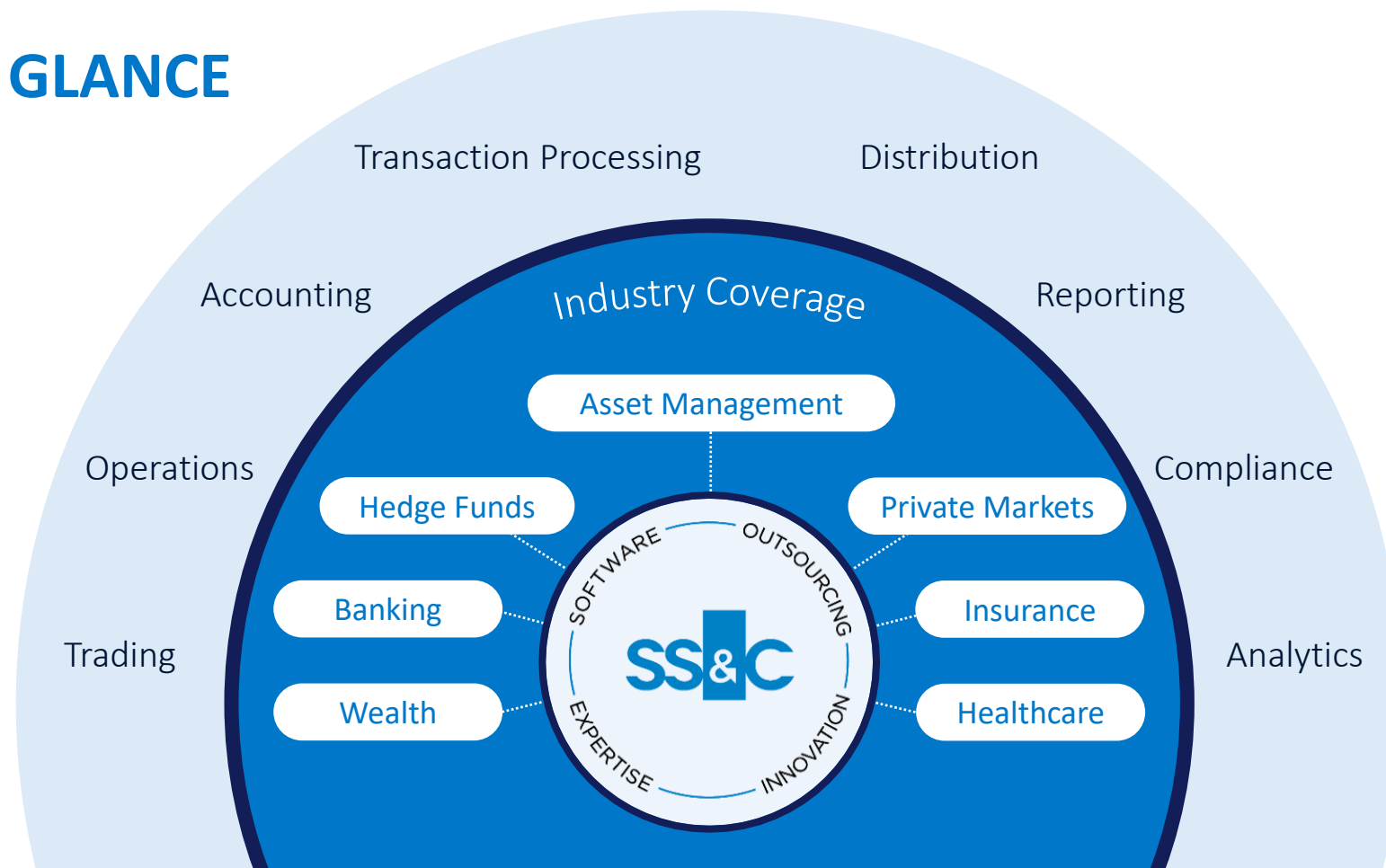
**200**  
products & services

**\$22 Billion**  
enterprise value

**30M**  
Covered Lives - Pharma

**47M**  
Members- Medical  
Claims

NASDAQ: SSNC



AUTOMATION

DATA

CLOUD

CONSULTING

## People

Global reach, local presence

Certified and licensed professionals:  
Ph.D., CPA, CFA, CA, PMP, CBCP, MBA, RPh

High tenure, high retention

## Process

Design and deploy target operating model

Comprehensive understanding  
of requirements

Institutional development feedback loop

## Technology

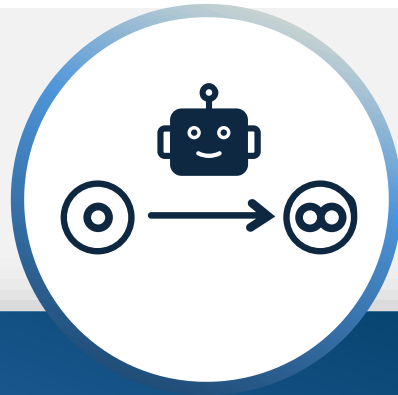
SOC 2, high level and controls

2000+ software/system engineers

Best of breed solutions, integrated platform

Blue Prism and AI throughout

# Top Trend in 2025: The Rise of AI Agents



## Traditional Process Automation

No "Thinking", just "Doing"

Deterministic, rules-based

Designed by people

**Workflow – RPA – ICR - OCR**



## Agentic Process Automation

"Thinking, Doing, Learning, Adapting"

Complex, dynamic, non-deterministic

Designed by agents

**Agents - Gen AI - LLM**

# 1 The Opportunity Is Transformative

But for Most Organizations, Value Realization is an Issue!

95%

of gen AI projects fail,  
delivering little to no  
measurable impact on P&L<sup>2</sup>



40%

of agentic AI projects canceled due to  
escalating costs, unclear business value  
or inadequate risk controls by 2027<sup>1</sup>



Sources:

1. Emerging Tech: Avoid Agentic AI Failure: Build Success Using Right Use Cases, Gartner, May 2025
2. The GenAI Divide: State of AI in Business 2025, MIT, 2025

## 2 Bridge the **Trust Gulf**

Without trust, you've got nothing

Trust in fully  
autonomous AI agents  
has dropped from

**43%**

to just

**27%**

in one year

Source:

CapGemini, Rise of agentic AI: How trust is the key to human-AI collaboration, 2025

### Kansas hospital sues Blue KC over AI-driven claims denials

An Advent Health hospital is seeking to order Blue Cross and Blue Shield of Kansas City to pay \$2 million for denied claims related to documented diagnoses, and to stop using clinical validation models to deny payments.

Global

Compliance & Legal

By [Andrea Fox](#), Senior Editor | July 14, 2025 | 1:40 PM



### 3 Address the **Skills Gap**

Time to unlearn, retrain, reskill

**39%**

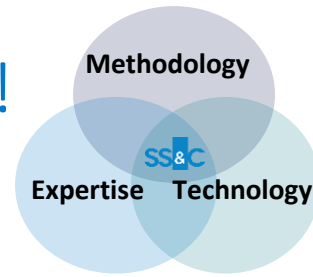
of key skills required in the  
job market will change by 2030

**59%**

of people will need to training  
(up or reskilling) by 2030



# How SS&C Blue Prism **can help!**



## Key Challenges facing AI Adoption:

## How SS&C Blue Prism can Help:

1

Value Realization  
- Low value realization today -



**Tangible Business Outcomes**  
- Proven in SS&C as 'Customer Zero' -

2

Governance Lag  
- Innovation pace vs ability to govern it -



**Responsible AI Adoption**  
- Governance enabled innovation -

3

Skills Gap  
- Time to unlearn, retrain, reskill -



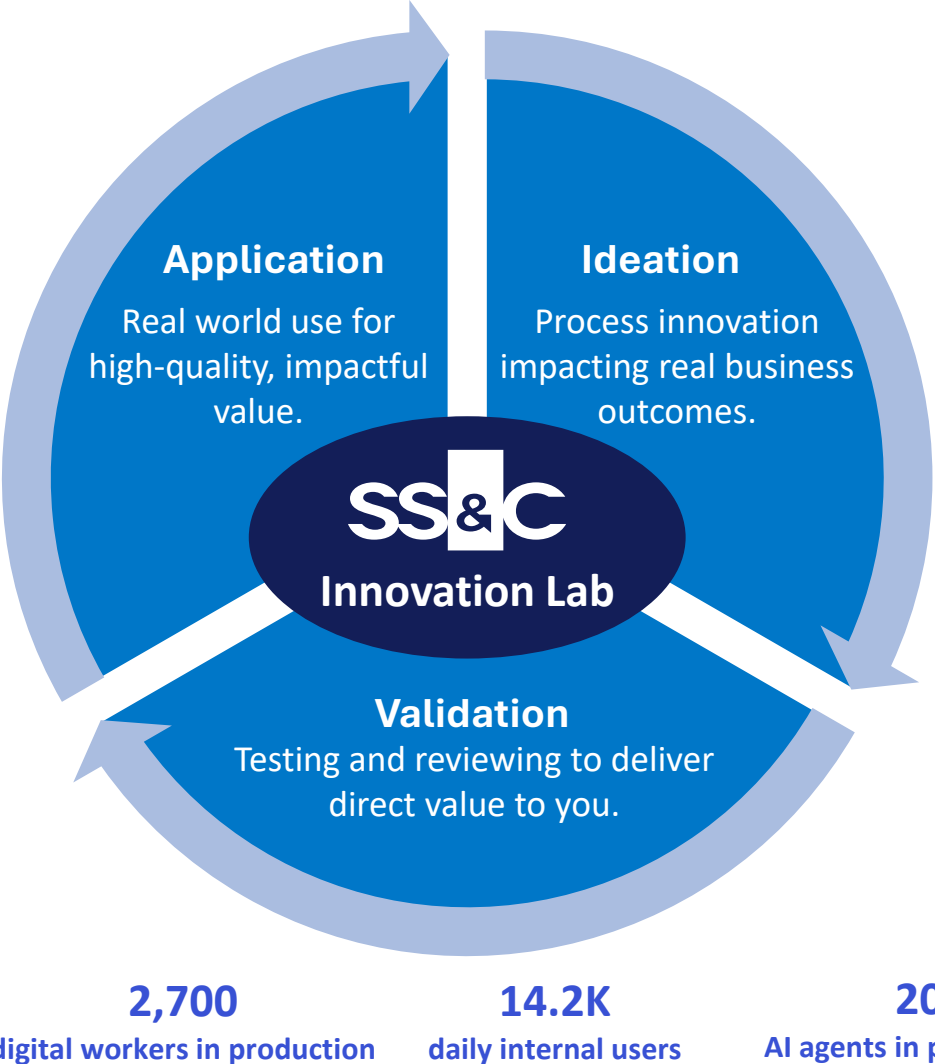
**Solutions, not Technology**  
- Prebuilt blueprints, bespoke services -

Relevant and responsible technology for highly regulated industries

- Vendor Contract Agent
- CPI Contracts Analyzer Agent
- Invoice Processing Agent
- Customer Comms Agent
- Prior Auth Agent
- Medical Coding Agent
- And many more...!

# SS&C Innovation Lab

We are 'Customer Zero'



**1400%**  
increase in funds served

**95%**  
faster credit agreement processing

**3x faster**  
letter generation and response speed

**CX**  
enhanced

**>\$200m**  
savings delivered

Errors  
**eliminated**



# Prior Auth – Preview Demo

Questions Answered

5

Agent Name

Prior Authorization Form Agent

Avg. Confidence

97.0%

Total Citations

5

Total Tokens

9,207

- Patient Information - Answer: John Beggans, 02/14/1965, 93458920

98.2%

Data Field: Patient Information

Answer: John Beggans, 02/14/1965, 93458920

Explanation: The patient's name, date of birth, and member ID can be found in Section III ? PATIENT INFORMATION of the prior authorization request form. The name is listed as John Beggans, the date of birth is 02/14/1965, and the member ID is 93458920.

Question: Extract patient name, date of birth, and member ID from the document

Citations: File Name:priorauthorizationform.pdf Page Number:1 Score:0.5Text:

Tokens Used: 1041

- Diagnosis Code - Answer: M17.11

96.5%

Data Field: Diagnosis Code

Answer: M17.11

Explanation: The ICD-10 diagnosis code is found in Section V of the prior authorization request form, under the column "Diagnosis Description (ICD version ) Code", where it is listed as M17.11 for the diagnosis of unilateral primary osteoarthritis.

Question: What is the ICD-10 diagnosis code associated with the prior authorization request?

Citations: File Name:priorauthorizationform.pdf Page Number:1 Score:0.5Text:



# What to Do TODAY

1. Continue the conversation
2. See a demo
3. Learn more on the website: [blueprism.com](https://blueprism.com)
4. Schedule an AI strategy session

**Customer Communication Agent**  
Combining Orchestration, Automation and Generative AI

**3x** faster response times  
**Resilient** to volume fluctuations  
**Improved** customer satisfaction

When a customer inquiry needs a written response, manually creating letters is time consuming. Using an AI-powered agent to automate the process streamlines manual steps, creating tailored customer letters faster, with exceptional and regulatory compliance.

**Process Implemented**

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**Business Impact**

- 3x faster response times
- Resilient to volume fluctuations
- Improved customer satisfaction

**Agent Benefits**

- 3x faster response times
- Resilient to volume fluctuations
- Improved customer satisfaction

**Contact Us**

Find out how Blue Prism can help you improve your customer communication today.

**Vendor Contract Analysis Agent**  
Combining Intelligent Automation and Generative AI

**10x** faster contract review  
**Increased** contract compliance  
**Increased** contract capacity

Processing and reviewing vendor contracts is a time-consuming and error-prone task. Using an AI-powered agent to automate the process streamlines manual steps, creating tailored contract reviews faster, with exceptional and regulatory compliance.

**Process Implemented**

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**Business Impact**

- 10x faster contract review
- Increased contract compliance
- Increased contract capacity

**Agent Benefits**

- 10x faster contract review
- Increased contract compliance
- Increased contract capacity

**Contact Us**

Find out how Blue Prism can help you improve your contract management today.

**Invoice Data Agent**  
Combining Intelligent Automation and Generative AI

**>90%** reduction in manual effort  
**Faster** invoice processing  
**Reduction** in errors

Manually processing invoices is time-consuming and error-prone. Using an AI-powered agent to automate the process streamlines manual steps, creating tailored invoice processing faster, with exceptional and regulatory compliance.

**Process Implemented**

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**Business Impact**

- >90% reduction in manual effort
- Faster invoice processing
- Reduction in errors

**Agent Benefits**

- >90% reduction in manual effort
- Faster invoice processing
- Reduction in errors

**Contact Us**

Find out how Blue Prism can help you improve your invoice management today.

**Credit Agreement Processing Agent**  
The Joint Power of Automation and Generative AI

**Errors** reduced  
**65%** faster credit agreement processing  
**Enhanced** customer experience

Credit agreements are lengthy and complex documents. Using an AI-powered agent to automate the process streamlines manual steps, creating tailored credit agreement processing faster, with exceptional and regulatory compliance.

**Process Implemented**

Credit agreements are lengthy and complex documents. Using an AI-powered agent to automate the process streamlines manual steps, creating tailored credit agreement processing faster, with exceptional and regulatory compliance.

**Business Impact**

- Errors reduced
- 65% faster credit agreement processing
- Enhanced customer experience

**Agent Benefits**

- Errors reduced
- 65% faster credit agreement processing
- Enhanced customer experience

**Contact Us**

Find out how Blue Prism can help you improve your credit agreement processing today.



**THANK YOU.**

