

Using RPA to Streamline Business Processes and Eliminate Errors

SphereGen Case Study Process Automation & Error Elimination

A large IT service and software provider implemented UiPath automation, saving 6 weeks of employee time annually and reducing transcription error rates to zero.



OVERVIEW

The client is a consulting company that specializes in designing, implementing, and managing secure digital platforms that enable customers to move their businesses at a faster pace. Sales agents at the client company were experiencing lag times in their order process when it came to converting confirmed deals or orders into fulfilled deals. They were spending large amounts of time registering deals and breaking them down into order forms to submit for fulfillment. The company needed to adjust their process to quickly register a deal, once they were in discussions with a client.

Challenges

When evaluating the solution requirements for the client, several challenges emerged related to existing processes:

- For larger, national, clients the deal had to be registered in multiple markets, office locations, and regions, which was time consuming and cumbersome.
- During the registration process, specific information needed to be entered to qualify for a deal discount. This process was time sensitive and human error or delays were costly.
- Once a deal had been reached, the deal had to be broken up into individual orders, based on delivery location. For example, a deal for 250 routers being delivered to 125 office locations would have needed to be broken up into 125 orders, each itemizing 2 routers. Each of the 125 orders required that a unique form be filled out with much of the same information. This was done manually and not only took time away from working on deals, but also introduced points for transcription errors.

Solution

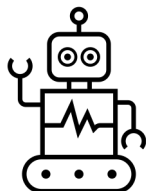
Based on thorough analysis and client input, SphereGen designed three automations using UiPath Software. Those automations related to Deal Registration/Applying Discounts and Processing Orders with multiple locations.

As a result, the automations turned processes which could take a day or more, into a workflow only requiring two hours at most.

RESULTS



Large order processing reduced from **8+ hours to 2 hours!**



Transcription Error rate reduced to **ZERO!**



Deal registration reduced from **6 minutes to 1 minute!**

THE DETAILS

Design and Deployment Process

1. Existing processes were mapped out to identify manual flows suitable for automation
2. The new flows, including automations, were designed and presented to the client
3. Upon approval, SphereGen used UiPath to develop and deploy automations
4. Staff was trained on running and maintaining the new processes. This included:
 - How to use UiPath User Interface
 - Process breakdown for automation
 - Evaluating automation exception notifications for additional support
5. SphereGen provided additional support for:
 - Automation Maintenance and Stabilization
 - Troubleshooting & completing in progress automations
6. SphereGen continues to provide support in the following areas:
 - On demand support calls
 - Automation Creation
 - Survey of automation candidates
 - Training
 - Troubleshooting services

Deal Registration and Discount Application Automation

In automating the Deal Registration process, SphereGen incorporated pulling client data from internal and 3rd party systems to automate forms entry.

The following steps were automated using UiPath RPA.

- Navigation to the deal registration page
- User login
- Entry of required registration information into the deal registration form
- Entry of required discount data into the discount application form

Deal Registration Extension Automation

The automation design process revealed the need to automatically extend the deal registration if closing took longer than the 90-day registration period. A bot was created to monitor an email inbox for key words indicating expiring deals. Upon encountering a designated key word, an email with a forms link and client information pulled from an internal Salesforce database would be sent to the account manager. The account manager could then extend the registration by filling out a form.

The following steps were automated using UiPath RPA.

- Bot which monitors email searching for registration and registration expiration key words
- Email reminder to account manager with all related client info from internal Salesforce database
- Completion of registration extension form using Salesforce data integration
- Replicated registration form sent to client

Deal Breakdown and Order Process Automation

In automating the deal breakdown and ordering process, SphereGen conducted a survey of the order form data fields to determine which information was unique to each order. Non-unique fields were filled in automatically utilizing Salesforce client data.

The following steps were automated using UiPath RPA.

- User login to Salesforce
- After product information is entered, redundant information is replicated across multiple order forms for different delivery locations.
- Creating a sales record on internal side
- Creating a sales record on the client's customers systems

CONCLUSION

Prior to working with the client, Sales Agents were experiencing long lag times between the closing of a deal and the fulfillment of an order. Additionally, an agent's process with prospective clients was slowed down by a lengthy deal registration process. By automating these processes, the client was able to reduce time consuming workflows to a fraction of their original length, while reducing transcription error by 100%.

Transcription Error Reduced by 100%

By utilizing the available tools within the UiPath software such as error logging, SphereGen was able to build an error proof automation. Through the error logging functionality and an in-depth understanding of the client's workflow, transcription error was reduced by 100%. This accuracy was verified between the approved order content and vendor system entry.

Time Intensive Processes Greatly Reduced

When the process automations were deployed, the time to completion for the deal registration, extension, and order breakdown processes were reduced as follows:

- Deals Registration process reduced to 5 minutes
- Large Order Processing reduced from 1-2 days time to under 2 hours
- Total time saved was equal to one worker working for 6 weeks per year
- Time saved allowed for more orders to be processed in a day

Customer and Job Satisfaction

Due to time saved and less tedious work, both customers and employees are happier with the results. Customer orders are processed more quickly. Employees have more time to focus on the challenging aspects of their jobs, increasing their productivity, creativity and quality of work.