Ui Path

Customer Use
Cases Slides

NATIXIS
BEYOND BANKING

Location:	Department	Industry
France	Procurement and Supply Chain	Financial and insurance activities

PROCESS

Customer transaction validation and payment

CHALLENGE

The company had a painfully manual process for handling customer transaction validation and payment. Their retail department was overwhelmed with time-intensive, cumbersome, and wasteful work. Employees received an email from the branch client with the transaction details in a PDF and the validation or invalidation of the international payment. The transaction information was transferred from the PDF to their internal system as well as to the payment system for the corresponding operation reference number to release the payment.

SOLUTION

The UiPath Robot read the mail, sorted the information into the correct folders, and opened and read the attached PDF files with optical character recognition (COR) that extracted the transaction amount and reference number. RPA now handles both the transaction and the new control and audit trail.

RESULTS

- Implemented in **3 months**
- **0** errors
- ROI within less than **12 months**
- **0%** exceptions

PROCESS

Order processing

CHALLENGE

The company was stuck using a manual, time-consuming data entry process that only allowed them to place orders through an enterprise resource planning (ERP) system. Not only was the process prone to human error, but at busy times, the bottleneck of manual work caused massive backlogs and unhappy customers.

SOLUTION

The UiPath Robot provided the ERP with order processing integration, relieving bottlenecks and exceeding the projected results.

RESULTS

- **3 time**s faster processing
- **100%** less customer backlog
- **60%** less SEV1 customer issues
- **90%** drop in short-term staffing requests

UiPath

PROCESS

Citrix automation

CHALLENGE

The company's Citrix-intensive processes through its customer-relationship management (CRM) system was cumbersome and time-consuming. Citrix transaction volumes were so high that the company was considering outsourcing these processes to an external provider despite the large expense. As is, their Citrix CRM setup couldn't be automated because the server sends only screenshots back to the user: good for security but not good for any robotic software requiring logical user interface (UI) elements.

SOLUTION

The UiPath Robots handled 1,000 transactions per day, exceeding expectations in several areas. UiPath's Citrix automation software is so capable the customer will expand its use past Citrix and to other ERM platforms. With the platform's optical character recognition (OCR) and image capturing capabilities, the company will continue to see increased process speeds.

RESULTS

- Implemented in **2 weeks**
- **100%** accurate Citrix automation
- **100%** extendable to other ERM platforms

CC001 | Customer: CenturyLink

PIRAEUS BANK

PROCESS

Fraud detection

CHALLENGE

The bank had an insufficient amount of resources allocated to their fraud detection process, which caused undue stress and work for their team, generating inefficiencies, frustration, and errors.

SOLUTION

The UiPath Robot accessed up to 15 applications and databases, both internal and external, for potential signs of suspicious activity among the bank's clients. It then compiled this information in a report for review by a human fraud analyst. This decreased the required work of employees and streamlined fraud protection.

RESULTS

- Processing time dropped from **45 minutes** to **20 minutes**
- **1 hour** of work was automated to 5 minutes
- **95%** automation
- **0%** exception rate

CP001 | Customer: Pireaus Bank

UiPath

SAP

Location:
Europe, Americas, APAC

Department
Human resources

Industry
Information and communication

PROCESS

New hire, employee transfer & departure processing

CHALLENGE

The company's existing new hire process was costly and involved high-volume manual work that was prone to human error. It took employees 30 minutes to complete each task with very low accuracy rates caused by copying and pasting data.

SOLUTION

UiPath's attended and unattended Robots and Kibana monitored process duration and exception types, improving data input, resource allocation, and error handling. The solution is expandable in cases of peak times or mass hiring.

RESULTS

- Process duration dropped to **3 to 4 minutes** per employee
- **100%** automation achieved
- **10 times** faster processing
- **100%** accuracy rate
- **100%** scalable during peak times

CS001 | Customer: SAP

Heritage Bank

Location: Australia	**Department** Other	**Industry** Financial and insurance activities

PROCESS

Rejected direct debits management

CHALLENGE

The company's rejected direct debits management process wasted employees' time by requiring them to manually check 800 to 1,000 transactions during the first four hours of each day. Based on a printed paper transaction report, they analyzed each customer with an overdrawn account and decided if the bank would honor or reject payment. Unfortunately, process rules weren't clear and bank fees were charged inconsistently.

SOLUTION

The UiPath Robot was used to capture the report and convert it to a spreadsheet, grab customer account information from the core banking system, analyze it, and---using a core set of rules---decide to honor or reject the direct debits. This increased accuracy and allowed the paper-recorded client histories to be added to the customer relationship management (CRM) system.

CH001 | Customer: Heritage Bank

RESULTS

- Implemented within **7-9 weeks**
- **95%** automation rate
- **+AUD 35,000** of monthly revenue gain
- Turnaround time down from **16 hours** to **6 hours** daily

UiPath

Heritage Bank

PROCESS

Verification of loan application documents

CHALLENGE

To verify loan application documents, the bank's employees had to manually check different web portal documents and related information for home loan applications, then collate everything into a single file. They were spending too much time processing 100 loan applications per week and needed to expedite the resolution process for customers.

SOLUTION

The UiPath Robot was used to quickly open different web portals and verify information before sending an email to the person who requested the required documentation for a decision.

RESULTS

- **20 hours** saved per week
- Shortened time to client response

General Electric

PROCESS

Enterprise-wide automation effort

CHALLENGE

The company had already implemented RPA and wanted to expand their automation scope to an enterprise level. Achieving a high-scale adoption and enhanced productivity were the company's two main objectives.

SOLUTION

GE created an RPA Center of Excellence that spanned multiple geographies and trained hundreds of finance professionals on RPA with UiPath's guidance. They saw great results with the first automation and decided to incorporate machine learning and business process management (BPM) into their RPA stack. The company declared: "We selected UiPath for software versatility and product vision. We are going to continue pushing the limit on process automation using RPA as a cornerstone."

CGE001 | Customer: General Electric (GE)

RESULTS

- **$150 million** productivity benefit by the end of 2017

UiPath

Department
Sales/front office,
F&A/procurement,
supply chain, IT, tax,
& compliance

Industry
Manufacturing

PROCESS

Repetitive processes across various service lines

CHALLENGE

Many of the organization's processes were repetitive and laborious tasks that took away from efficiency, production, and accuracy across various service lines: peer-to-peer (P2P), order to cash (O2C), record to analyze (R2A), supply-chain management (SCM), master data management (MDM), analytics, and global business units.

SOLUTION

Together with partner Capgemini, UiPath was selected to establish an RPA Center of Excellence (CoE) and showcase its efficiency using its Enterprise RPA Platform. A successful proof of concept was taken to full scale. UiPath deployed agent-assisted Robots for attended work and unattended Robots for processes running in the background.

RESULTS

- **85%** full-time equivalent capacity created by the end of 2017
- **60%** reduced cycle time
- Robots **3 times** faster than advisers

PCA012 | Customer: Unilever | Partner: Capgemini

PROCESS

Financial operations

CHALLENGE

The company envisioned their future of finance to combine human insights with intelligent automation to create a digital workforce. They had been investing in data analytics, predictive modeling, process improvement, data science, and robotic process automation in order to replace their manual, time-consuming financial operations processes.

SOLUTION

The HP Finance branch developed templates and tools for business units and created a process to integrate subject-matter experts and technical teams with the process owners. These best practices have delivered bottom-line benefits and a culture of innovation. UiPath deployed 109 Robots to drive their RPA development.

RESULTS

- **62,560 hours** saved by the end of 2017
- **$1.6 million** saved by the end of 2017

dentsu

Department
Procurement and
Supply Chain

Industry
Information and
communication

PROCESS
Workstyle reform across various processes

CHALLENGE

Dentsu Inc. marked their employee work environment innovation as one of their most important management issues and knew they needed an RPA solution that was flexible enough to automate various tasks in a wide range of departments to make it better.

Ui|Path

SOLUTION

UiPath's Enterprise RPA Platform supported work-style reform and better productivity in the company's data-intensive accounting processes. Both attended and unattended Robots delivered support for RPA governance and RPA developer training.

RESULTS

- **400** automated processes by the end of 2017
- **2,500** automated processes estimated by the end of 2018
- **10,000** hours saved per month

CD001 | Customer: Dentsu Inc.

Hollard.

Location:
South Africa

Department
Procurement and
Supply Chain /
Finance, Accounting
and Tax / Legal and
Compliance

Industry
Financial and
insurance
activities

PROCESS

Insurance broker-driven service delivery

CHALLENGE

The customer, a large insurer in South Africa, handled 1.5 million emails per year from the broker community. Employees had to interpret information from the emails and review attachments to identify content type. The process required accuracy and meeting timely expectations. Completing the workflow in compliance with service-level agreements (SLAs) and specific regulatory and statutory provisions represented a big challenge.

SOLUTION

Using machine learning, natural language processing (NLP), intelligent optical character recognition (OCR), analytics capabilities, and the UiPath Platform, the company created an expert single user interface. The Robot interprets the content contextually from the email, classifies and extracts all the necessary documentation, updates necessary systems, interacts with the human users to complete specific instructions, and delivers confirmation once the process is complete.

PL001 | Customer: Hollard Group | Partner: LarcAI

RESULTS

- **2,000** hours per month saved
- **98%** fully automated
- **600%** reduction in mean time to execute
- **91%** reduction of cost per transaction

CURO
FUND SERVICES

Location:
South Africa

Department
Procurement and
Supply Chain

Industry
Financial and
insurance
activities

LARCAI
COGNITIVE AUTOMATION

UiPath

PROCESS
Price sourcing in portfolio position management

CHALLENGE
A large South African investment administration services provider was held back by a process that was inefficient for clients, hung up operations, and lacked support. Employees had to handle 250 transactions per day as part of the price-supporting process and manually review pricing input, interpret and validate the information, update systems, and check for updates to ensure the correct transfer.

SOLUTION

The UiPath solution includes deep learning from the Microsoft Cognitive Toolkit, IBM Watson Analytics, Accord, .NET Framework machine learning, and ABBYY optical character recognition (OCR). UiPath Robots locate the email instructions, consult other data sources, update the product pricing and end-of-day positions, create transaction logs, perform basic reporting, and produce an audit report for sign-off.

RESULTS

- **54%** increase in efficiency
- **35%** overall effort displacement
- **1%** error margin
- **65%** rate of automation

| | **Location:** India | **Department** Procurement and Supply Chain | **Industry** Financial and insurance activities |

BRAND NEW DAY
Creating Happy Investors

PROCESS

Customized client services

CHALLENGE

The company was facing efficiency issues in their customized client services processes, which provided their customers with research data for trading and asset purchases. Employees used a secure website with aggregated policy offers from different providers to present options to customers. They were expected to do so the same day they received the request and had to extract the information manually and put it into the customer account to close the case.

SOLUTION

UiPath began with a product demo focused on user interface (UI) automation and data extraction to prove the product features really make automation simple and clear. We provided a trial software so that the customer could try automating processes as demonstrated in the demo session.

RESULTS

- Up to **96%** reduction in process times
- **80%** full-time equivalent reduction in automated processes
- **60%** of process automation done by non-IT staff
- Scalable support process

CBND001 | Customer: Brand New Day | Partner:

Location:
UK

Department
Support and
Servicing

Industry
Public
administration
and defence

Department for Work & Pensions

PROCESS

Mission, pension processing

CHALLENGE

DWP, the largest government department in the UK, handled welfare and pensions services, such as disability, processing about 177 billion payments to 20 million people each year. They had a backlog of 30,000 claims; however, that would have taken 35-40 weeks to clear via manual processes.

SOLUTION

The company had created an "Intelligent Automation Garage" to deploy digital technology to automate manual, routine tasks. First, they focused on bringing 17 existing RPA projects together and creating four pilot programs. With UiPath Robots, they were able to streamline digitalization and clear the backlog in two weeks.

RESULTS

- Implementation within **12 weeks**
- **30,000 c**laims cleared from backlog in 2 weeks
- **15:1** return on investment
- **3 minutes** to deploy new Robots

CD001 | Customer: Department of Work and Pensions

UiPath

Global automotive supplier

ROBOYO
PROZESSE · EFFIZIENT · AUTOMATISIERT

UiPath

PROCESS

Processing purchase requests

CHALLENGE

The company had a manual process that required employees use SAP, email, Excel, and a desktop web portal. The workflow was frustrating to their team, and took them an average of three hours to handle each of the 30 purchase requests (PRs) they received each week. It was structured by rule- and decision-based logic and included interactive support from users. Because of the large amount of manual work required, the process was wasting staff time and creating errors in processing.

SOLUTION

Paper was replaced with a simple, user-friendly web portal that fed purchase requisitions into the UiPath Robot. The Robot then entered the information in SAP, checked for approvals via email, and created the purchase orders automatically. This improved employee experience by reducing the amount of manual work required and accelerated the benefits from digital transformation.

RESULTS

- Implemented within **5 weeks**
- **100%** of effort was automated
- ROI in **8 months**
- **0%** error rate
- Processing time reduced by **78%**
- Manual effort was reduced to **5%**

PR002 | Partner: Roboyo

Location:	Department	Industry
Germany	Sales	Manufacturing

ROBOYO
PROZESSE · EFFIZIENT · AUTOMATISIERT

PROCESS

Daily project management reporting

CHALLENGE

The company's facility managers were responsible for a large volume of emails---500 per day that took 720 seconds each---and were losing valuable time that could otherwise be spent on high-value projects. Three departments used two different applications on desktop to carry out the structured, rule-based process.

UiPath

SOLUTION

The UiPath Robot extracted data from the various SAP tables, personalized it for each facility manager, and sent the personalized lists via email to improve employee experience. The lists included current and future tasks as well as open items in need of attention.

RESULTS

- Implemented in **4 weeks**
- **100%** of efforts automated
- ROI in **6 months**
- **0%** error rate
- Manual effort was reduced to **5%**
- **80%** reduction in processing time

Construction company

Location:
Germany

Department
Sales

Industry
Manufacturing

ROBOYO
PROZESSE · EFFIZIENT · AUTOMATISIERT

PROCESS

Management of old admission tickets

CHALLENGE

The company's process managing their old admission tickets was error-prone and wasting employee time, taking them an average of fifteen minutes to process each of the 500 tickets they received per day. Four full-time equivalents were needed across two departments to carry out of the work using two desktop applications.

SOLUTION

The UiPath Robot searched and took out access card numbers for building admissions from an Excel file, adding information in two customer portals. It saved and converted the data, entered it in the web portal, and carried out actions like deleting and adding new zones as needed. The automation improved customer experiences while accelerating the benefits of their digital transformation.

PR004 | Partner: Roboyo

RESULTS

- Implemented in **4 weeks**
- **100%** of efforts automated
- ROI in **4 months**
- **0%** error rate
- Manual effort was reduced to **10%**
- **60%** reduction in processing time

Construction company

Location:
Germany

Department
Other (Data Processing)

Industry
Manufacturing

ROBOYO
PROZESSE · EFFIZIENT · AUTOMATISIERT

PROCESS

Data extraction and reporting

CHALLENGE

The company's high-volume SAP process heavily taxed the department that was responsible for data extraction and reporting via SAP, Excel, and Access. The remote desktop process had a volume of 1.05 GB of data per day, a runtime of 1.4 hours per day and an average handling time of 14 minutes per report.

SOLUTION

The UiPath Robot prepared reports for a variety of tables in SAP, each with personalized layouts and condition types. This provided the company's employees with more time to concentrate on higher-value processes that involved greater creative thinking, improving employee experience.

RESULTS

- Implemented in **3 weeks**
- **100%** of efforts automated
- **150%** ROI
- **0%** error rate
- Manual effort was reduced to **0%**
- **70%** reduction in processing time

PR005 | Partner: Roboyo

Human resources service provider

ROBOYO
PROZESSE · EFFIZIENT · AUTOMATISIERT

UiPath

PROCESS

Invoice processing for special customers

CHALLENGE

The company's process for handling invoices was convoluted and wasted valuable employee time. With 100 events per month and an average handling time of five minutes per voucher, it was error-prone and slow. Four departments worked with two applications (internal portal and SAP) on both web and desktop to process invoices.

SOLUTION

The UiPath Robot extracted data from SAP for each of the HR service provider's customers and uploaded the created invoice to a procurement portal, entering the data into the correct data fields. This improved employee experience by reducing the amount of manual work they had to do and allowing them to focus on higher-value tasks.

RESULTS

- Implemented in **4 weeks**
- **70%** of efforts automated
- ROI in **3 months**
- **0%** error rate
- Manual effort was reduced to **10%**
- **75%** reduction in processing time
- **60%** cost savings

PR006 | Partner: Roboyo

Human resources service provider

ROBOYO
PROZESSE · EFFIZIENT · AUTOMATISIERT

PROCESS

Booking voucher posting

CHALLENGE

The company's high-volume book voucher process took up valuable employee time across four departments. It took 400 seconds to process each of the 2,000 vouchers each month and required two different web and desktop applications.

UiPath

SOLUTION

The UiPath Robot handled the interface between SAP systems and the web. It exported various documents from SAP (e.g., booking documents and timesheet documents) and uploaded and processed them in the web portal. The implementation of this automation accelerated the benefits of digital transformation for the company.

RESULTS

- Implemented in **4 weeks**
- **70%** of efforts automated
- ROI in **5 months**
- **0%** error rate
- Manual effort was reduced to **15%**
- **85%** reduction in processing time
- **60%** cost savings

PR007 | Partner: Roboyo

Human resources service provider

ROBOYO
PROZESSE · EFFIZIENT · AUTOMATISIERT

PROCESS

Creating work sick certificates

CHALLENGE

Faced with a slow but high-volume process, the company was looking for a way to handle the 2,500 work sick certificates they received per month. It took the department responsible four minutes to process each certificate using two applications on desktop, SAP, and paper.

UiPath

SOLUTION

The UiPath Robot extracted the data from a transaction in SAP, inserted the information in the HR provider's customer's SAP system, and printed it. The automation allowed employees to focus on more cognitive, creative work rather than the manual process.

RESULTS

- Implemented in **3 weeks**
- **90%** of efforts automated
- ROI in **6 months**
- **0%** error rate
- Manual effort was reduced to **5%**
- **80%** reduction in processing time

PR008 | Partner: Roboyo

Human resources service provider

ROBOYO
PROZESSE · EFFIZIENT · AUTOMATISIERT

PROCESS

Creating reports in web portal

CHALLENGE

The company's process for creating reports in their web portal was manual, time-intensive and wasted valuable employee resources in the department responsible for the 50 reports needed each month. It took the team an average of 30 minutes per report using two applications on desktop, SAP, and a web portal.

UiPath

SOLUTION

The UiPath Robot handled the process that extracted data from an SAP web portal, prepared the data in Excel, and printed it. This allowed employees who previously had to manually create reports to focus on higher-value work.

RESULTS

- Implemented in **4 weeks**
- **100%** of efforts automated
- ROI in **7 months**
- **0%** error rate
- Manual effort was reduced to **20%**
- **75%** reduction in processing time

PR009 | Partner: Roboyo

ROBOYO
PROZESSE · EFFIZIENT · AUTOMATISIERT

PROCESS

Predicting maintenance for locomotives

CHALLENGE

Faced with predicting vital maintenance for locomotives, two departments within the company spent 30 minutes a day doing cumbersome, manual work. The process required they use five applications on desktop, web, and SAP.

SOLUTION

The UiPath Robot checked various tools and files from SAP to gather maintenance data for the cargo locomotives and consolidated it in Excel files. This helped the customer to predict maintenance needs with higher accuracy.

RESULTS

- Implemented in **3 weeks**
- **100%** of efforts automated
- ROI in **3 months**
- **0%** error rate
- Manual effort was reduced to **10%**
- **50%** reduction in processing time

Media company

Location:
Switzerland

Department
Procurement and
Supply Chain

Industry
Information and
communication

ROBOYO
PROZESSE · EFFIZIENT · AUTOMATISIERT

UiPath

PROCESS

Processing credit notes (process one)

CHALLENGE

The company's process for credit notes left employees handling 100 Excel files per months, taking eight minutes per table. To do this, the department used three applications (Google Drive, Excel, and SAP) on desktop.

SOLUTION

The UiPath Robot extracted data from various data sources, validated the data for every source, and entered the information into the SAP system. This allowed employees to focus on processes that involved more critical thinking.

RESULTS

- Implemented in **4 weeks**
- **100%** of efforts automated
- ROI in **3 months**
- **0%** error rate
- Manual effort was reduced to **0%**
- **60%** reduction in processing time

PR011 | Partner: Roboyo

Media company

Location:
Switzerland

Department
Procurement and
Supply Chain

Industry
Information and
communication

PROCESS

Processing credit notes (process two)

CHALLENGE

Employees across two departments at the company had to process 150 PDF files per month manually to handle their credit notes. This took each of them 10 minutes per file using four different applications (Google Drive, Adobe Acrobat, Excel, and SAP) on desktop.

SOLUTION

The UiPath Robot extracted data from a PDF file, validated the data for every PDF file against Excel files and an enterprise resource planning (ERP) system, and entered the information into the system. This automation allowed employees to focus on more creative and involved tasks.

RESULTS

- Implemented in **4 weeks**
- **100%** of efforts automated
- ROI in **3 months**
- **0%** error rate
- Manual effort was reduced to **10%**
- **75%** reduction in processing time

PR012 | Partner: Roboyo

Accounting provider

ROBOYO
PROZESSE · EFFIZIENT · AUTOMATISIERT

PROCESS

Exporting and importing from statements of account

CHALLENGE

The company's process for exporting and importing information from statements of account was cumbersome and slow. Employees had to manually process 50 transactions per day, every day, which took them about 10 minutes each time. The department used Excel, DATEV, and SAP on desktop to process the information.

SOLUTION

The UiPath Robot handled the process by exporting the accounts' statements from DATEV to the SAP system. This not only allowed employees time to focus on other work instead of exporting and importing statements, but it created a faster response time for queries.

RESULTS

- Implemented in **3 weeks**
- **100%** of efforts automated
- ROI in **3 months**
- **0%** error rate
- Manual effort was reduced to **5%**
- **85%** reduction in processing time

PR013 | Partner: Roboyo

Accounting provider

ROBOYO
PROZESSE · EFFIZIENT · AUTOMATISIERT

PROCESS

End-of-month accounting

CHALLENGE

Employees at the company had to complete end-of-month accounting manually every few weeks, taking up valuable time and resources that could be better spent on high-value projects with a broken workflow that caused frequent errors. Three departments used five applications to handle 10 transactions per month, which took them 40 minutes each.

SOLUTION

The UiPath Robot carried out a process that included salary accounting, importing and exporting data between DATEV and SAP, and checking that the different bookings were the same in both accounting systems. This improved employee experience by allowing staff to focus on higher-value work, as well as ensured better financial tracking and compliance.

RESULTS

- Implemented in **6 weeks**
- **75%** of efforts automated
- ROI in **5 months**
- **0%** error rate
- Manual effort was reduced to **25%**
- **65%** reduction in processing time

PR014 | Partner: Roboyo

Consumer goods company

Location:
Germany

Department
Procurement and
Supply Chain

Industry
Manufacturing

ROBOYO
PROZESSE · EFFIZIENT · AUTOMATISIERT

UiPath

PROCESS

Processing travel and expenses

CHALLENGE

The company's workflow for processing travel and expenses wasted valuable employee time and resources. Faced with thousands of transactions per month, the department was fighting an uphill battle using four applications, including SAP and MS Office on desktop.

SOLUTION

The UiPath Robot extracted data from a T&E form (Excel form out of SAP) and processed it through a workflow in SAP to enable approval and payment. This automation allowed employees to be redeployed to higher-value activities.

RESULTS

- Implemented in **3 weeks**
- **100%** of efforts automated
- **0%** error rate
- Manual effort was reduced to **15%**
- **75%** reduction in processing time

PR015 | Partner: Roboyo

Medical and pharmaceutical company

ROBOYO
PROZESSE · EFFIZIENT · AUTOMATISIERT

UiPath

PROCESS

Three-way matching in accounts payable

CHALLENGE

The company's accounts payable process was manual and cumbersome. Requiring three full-time equivalents, three departments were responsible for handling approximately 1,800 invoices per month with four applications, including MS Office and email on desktop, as well as paper and optical character recognition (OCR).

SOLUTION

Using ABBYY OCR, The UiPath Robot extracted data from an incoming invoice via email. It validated the PO number, the number of items, and the cost per item against the purchase order and goods received. This allowed employees to focus on higher-value processes that involved more critical thinking.

RESULTS

- Implemented in **4 weeks**
- **100%** of efforts automated
- ROI in **2 months**
- **0%** error rate
- **90%** reduction in processing time
- Manual effort reduced to **10%**

PR016 | Partner: Roboyo

Bank

ROBOYO
PROZESSE · EFFIZIENT · AUTOMATISIERT

UiPath

PROCESS

Exchanging of ATM data

CHALLENGE

Employees of the company were stuck with a manual, time-consuming ATM data exchange process. Two departments had to handle 200 data records per day, which took them 10 seconds per record. They used three applications on both desktop and web to process the information.

SOLUTION

The UiPath Robot extracted and compared data records from a web portal and a desktop application to create an Excel file that contained the collected data. By automating this process, the company was able to respond faster to internal customers.

RESULTS

- Implemented in **4 weeks**
- **90%** of efforts automated
- ROI in **2 months**
- **0%** error rate
- Manual effort was reduced to **0%**
- **70%** reduction in processing time

Bank

Location:
Switzerland

Department
Procurement and
Supply Chain

Industry
Financial and
insurance
activities

ROBOYO
PROZESSE · EFFIZIENT · AUTOMATISIERT

PROCESS

Creating bank accounts for mortgage customers

CHALLENGE

500 times a month, employees in three of the company's departments spent 300 seconds creating bank accounts for mortgage customers. They used two applications on both desktop and web to keep up by referencing existing or new customers, length of mortgage, credit ratings, and other factors.

SOLUTION

The UiPath Robot handled the automation of the interface between the credit information web portal and the core system of the bank.

RESULTS

- Implemented in **4 weeks**
- **100%** of efforts automated
- ROI in **3 months**
- **0%** error rate
- Manual effort was reduced to **5%**
- **75%** reduction in processing time
- **70%** cost savings

Food producer

Location:
Germany

Department
Procurement and
Supply Chain

Industry
Manufacturing

ROBOYO
PROZESSE · EFFIZIENT · AUTOMATISIERT

PROCESS

Managing pallet tracking

CHALLENGE

The company's process for managing pallets relied on a detailed, manual exchange of data between the production system, enterprise resource planning (ERP) system, and logistics supplier. For each of the 20 pallets per day, employees spent 120 seconds using two applications on desktop and web to enter the correct information for their records.

SOLUTION

The UiPath Robot communicates between the production system, the ERP system, and the web portal of a logistics supplier. Human workers send information to the Robot, which looked up the pallet numbers and registered them in the web portal before transferring the rental time to the client. This automation resulted in savings through direct entries into the target system, plus more independence of departments.

RESULTS

- Implemented in **4 weeks**
- **80%** of efforts automated
- ROI in **8 months**
- **0%** error rate
- Manual effort was reduced to **0%**
- **75%** reduction in processing time

PR019 | Partner: Roboyo

Human resources service provider

Location:
Switzerland

Department
Human resources

Industry
Professional, scientific and technical activities

ROBOYO
PROZESSE · EFFIZIENT · AUTOMATISIERT

UiPath

PROCESS

Automating payroll mutations

CHALLENGE

The company's employees struggled to keep up with the 100,000 payroll mutations that came in each month. It took them 60 hours per month---six full-time equivalents---to process the requests using two applications on desktop.

SOLUTION

The UiPath Robot handled payroll changes received via email from the customers and automatically entered them into the SAP system. This allowed capacities to be expanded cost-effectively as the company grew.

RESULTS

- Implemented in **7 weeks**
- **90%** of efforts automated
- ROI in **4 months**
- Staff costs reduced by **60%**
- **0%** error rate
- Manual effort was reduced to **25%**
- **85%** reduction in processing time

PR020 | Partner: Roboyo

Leading global investment bank

Cognizant

PROCESS

Trade settlements

CHALLENGE

The company's trade settlement process cost employees valuable time due to a complicated, expensive manual workflow that was prone to human error. This was because of challenges identifying unmatched and pending trades with the Counterparty and Custody for various geographical regions. The process required heavy investigation, coordination, and adjustment with multiple stakeholders via email.

SOLUTION

The UiPath Robot automatically performed validation after information was received by email. It searched for trade details, identified unmatched and pending trades, and updated the transaction numbers and Counterparty details in a spreadsheet. The Robot then sent out an email to the Custody and Counterparty with the update.

RESULTS

- Average handling time reduced from **40 minutes** to **3 minutes**
- **0%** error rate
- Saved an estimated **444 hours** per year

PC001 | Partner: Cognizant

Large telecom & media company

Cognizant

PROCESS

Managing order creation and customer care

CHALLENGE

The company's order management and customer care process involved a huge volume of transaction data that slowed down processing and hurt their bottom line. The process handled 480-600 orders per day. They also offered a speed booster service at discount, but didn't have an efficient process behind it, costing the company 20 AUD per customer per month. They wanted to remove the package to lower costs.

SOLUTION

The UiPath Robot supported the order build process and service removal activity. The Robot was built on the client's CRM system (Siebel) and was tested and deployed into production. The automation—which involved four Robots running 24/7—generated a daily operational report for discussion with stakeholders.

RESULTS

- Implemented in **4 weeks**
- **90%** of efforts automated
- **25,000** orders processed in the first four months
- **10** full-time equivalents saved

Leading financial services company

Department
Support and Servicing

Industry
Financial and insurance activities

MINDFIELDS
GROW FOR TOMORROW

UiPath

PROCESS

Translating financial reports

CHALLENGE

Each year, the company needed its financial report documents translated from English to French. They outsourced this to two teams: one did the translation and the other ensured that the reports kept the same layout and format. The translation process took three weeks or more, while the goal was to reduce the time to one week.

SOLUTION

The attended UiPath Robot read all English reports and translated to French using the Google Translation Engine and a predefined translation dictionary. As the translation wasn't perfect, another team checked it before the Robot checked it against the original report using the "search and replace" action to maintain the original layout.

RESULTS

- **50%** full-time equivalent savings
- Process turnaround reduced from **3 weeks** to **4 days**
- Expected productivity savings of approximately **200 hours** per year

Leading financial services company

Department
Procurement and Supply Chain

Industry
Financial and insurance activities

Cognizant

PROCESS

Comparing financial reports

CHALLENGE

Each quarter, employees at the company had to compare current and historical PDF financial reports. They had to print all documents and manually compare line by line, wasting time and energy, for hundreds of reports. This took them an average of 20 minutes per document.

SOLUTION

The UiPath Robot compared reports based on predefined business rules. Using an advanced, built-in optical character recognition (OCR) engine, the Robot extracted data directly from the PDFs and validated all fields and numbers before generating a summary report.

RESULTS

- Average handling time per report was reduced from **20 minutes** to **2 minutes**
- **100%** accuracy in report comparison

PC004 | Partner: Cognizant

Large utility company

Department	Industry
Procurement and Supply Chain	Electricity, gas, steam and air conditioning supply

Capgemini

PROCESS

Posting and processing monthly invoices

CHALLENGE

The company's accounts payable team handled tens of thousands of invoices received by email manually, posting them to their enterprise resource planning (ERP) system monthly. As the company deals with more than 2,000 vendors and each has their own invoice template, the process requires analysts with experience to read and post the invoices.

UiPath

SOLUTION

With ABBYY FlexiCapture (a leading smart optical character recognition (OCR) provider) and a pre-trained machine learning model, the UiPath Robot populated all fields with the extracted data in the company's ERP system. It also handled all the business logic, such as sending follow-up emails and archiving invoices. This allowed the company to focus on more valuable tasks with human employees.

PCA001 | Partner: Capgemini

RESULTS

- **60%** reduction in overall workload
- More than **90%** success rate of invoice data extraction
- Increased upstream and downstream interest in RPA technology

Leading healthcare service provider

Location:
USA

Department
Finance, Accounting and Tax

Industry
Human health and social work activities

Cognizant

UiPath

PROCESS

Operational quality assurance reporting & compliance

CHALLENGE

The company was struggling to process customer requests within the agreed timelines and needed to reduce the time spent extracting reports from web applications. Employees had to manually export 40 reports per day from Siebel to aggregate the details of open and closed cases. Associates used the information to inform daily operations, but the workflow was prone to error and poor quality.

SOLUTION

A UiPath Robot downloaded the reports from a Siebel application on a daily basis using easily defined rules and triggering an email notification every time it successfully completed the process. This increased operational quality as well as employee experience.

RESULTS

- **100%** accuracy rate in processing
- **100%** full-time equivalent savings

PC003 | Partner: Cognizant

Cognizant

PROCESS

Purchase order & invoice management (process one)

CHALLENGE

The company was wasting time and resources with an inefficient, manual invoice process. Nearly 850 invoices were received each day electronically and by mail, 53 percent of which were able to be automated with the rest falling into the exceptions queue. Employees had to validate unmatched invoices and goods received notes (GRN) as well as decide to clear the invoice for payment or escalate to a branch.

SOLUTION

The UiPath Robot processed the invoices based on predefined business rules. Data extraction, data entry, data validation, and data comparison were a part of the final automation. This automation saved valuable employee time and improved compliance.

RESULTS

- **100%** compliance on turnaround time
- **54%** full-time equivalent savings

Department
Procurement and
Supply Chain

Industry
Manufacturing

Cognizant

UiPath

PROCESS

Purchase order & invoice management (process two)

CHALLENGE

The company's manual process for the 5,000 invoices they received every day wasted employee time and resources. Invoices were processed manually and optical character recognition (OCR) was used to upload the ledger (AS400) via scripts. Script halts and regenerations of scripts during the upload process were tedious and time-consuming.

SOLUTION

The UiPath Robot took over data entry and script generation and running to provide the supplier reference decision. It also replayed the script until the transaction was complete without manual intervention. This automation allowed employees to focus on higher-value work instead of a tedious, manual invoicing process.

RESULTS

- **100%** compliance on turnaround time
- **90%** full-time equivalent savings

Corporate and investment bank

Location: Switzerland

Department Procurement and Supply Chain

Industry Financial and insurance activities

Cognizant

PROCESS

Underwriting and new business

CHALLENGE

The company's need for a precision comparison of account records wasn't fulfilled by their manual process that supported financial reconciliation of monthly bank statements from all their clients. The manual comparison of bank statements---and the process of adding this information to their system--- was time-consuming, tedious, and had errors due to the human work.

SOLUTION

The UiPath Robot automatically performed data extraction from the bank statements of all clients and compared them with the accounting system (BIS Ledger/Cockpit) to ensure balances were accurate and matching. Once reconciled, the information was updated in the system.

RESULTS

- **100%** process accuracy
- **0** errors
- **80%** turnaround time reduction
- **25%** less human effort was needed

PC006 | Partner: Cognizant

Global BPO provider

PROCESS

Invoice automation

CHALLENGE

The company's invoice process was slow, error-prone, and relied on manual labor. The major pain point was the end step of posting the invoice, which required the business process outsourcing (BPO) company's customers to access their enterprise resource planning (ERP) systems through remote/virtual environments (Citrix).

SOLUTION

The UiPath Robot provides secure, quick, and precise automation. It effectively relieved employees of manual work and improved the process without switching between applications to copy and paste information. To process the invoices, the Robot copies the data from various sources in one sweep and imports them into the correct ERP fields.

RESULTS

- **70% reduction** in delivery effort from **10 minutes** to **3 minutes**

Location:
India

Department
Procurement and
Supply Chain

Industry
Wholesale and
retail trade

PROCESS

Order to cash

CHALLENGE

The company's completely manual, repetitive, time-consuming order-to-cash process was laden with typing errors. Using a rule-based workflow, the process involved data from 15 countries with 200,000 transactions per month.

SOLUTION

The UiPath Robot was the perfect match for the retail company's manual process. The partner programmed and implemented UiPath Robots that interacted with different bank websites using a workflow tool and enterprise resource planning (ERP) to apply cash without human intervention.

RESULTS

- **80%** automation rate
- **100%** accuracy of transactions

PCA002 | Partner: Capgemini

Retail company

Location:
India

Department
Procurement and
Supply Chain

Industry
Wholesale and
retail trade

PROCESS

Open item reconciliation

CHALLENGE

The company's process for open item reconciliation for general ledger (GL) accounts was manual, time-consuming, and involved customer requests that human team members had to resolve. Employees processed 5,000 requests per month from 35 countries.

SOLUTION

A UiPath Robot was used to transfer data from SAP to the Trintech system. This reduced errors, increased efficiency, and sped up processing.

RESULTS

- Significant productivity gains
- Reduced manual workload
- Decreased volume of reworking

PCA003 | Partner: Capgemini

Retail company

Location:
India

Department
Procurement and
Supply Chain

Industry
Wholesale and
retail trade

Capgemini

UiPath

PROCESS

Non-purchase order processing

CHALLENGE

In order to handle non-purchase order requests from customers, the company had to wade through a time-consuming, manual process.

SOLUTION

The UiPath Robot handled the data from the BPOpen tool to the OFIN system to reduce errors, increase efficiency, and speed up processing. This automation created a better employee experience and could be replicated with minor adjustments across engagement within CG.

RESULTS

- Scalable solution across all entities
- Efficient automation of manual activities

Retail company

Location:
India

Department
Procurement and
Supply Chain

Industry
Wholesale and
retail trade

PROCESS

Cost calculation and release

CHALLENGE

The company's cost calculation process for its supply chain was completely manual, repetitive, and prone to typing errors. Employees handled a volume of 8,000 transactions per month for 200 accounts across 11 countries.

SOLUTION

The automation partner programmed an RPA solution using UiPath Robots that handled all the requests in Excel and input them into SAP.

RESULTS

- **100%** accuracy of transactions
- Improved efficiency
- Reduced volume of reworking

Manufacturing company

Location:
India

Department
Procurement and
Supply Chain

Industry
Manufacturing

PROCESS

Vendor master data management

CHALLENGE

The company's vendor master data management process was completely manual and involved several pre-checks, such as VAT validation and IBAN validation through a country-specific website. The workflow also included country-based validation for vendor processing in SAP.

SOLUTION

The UiPath Robot extracted data from the service provider tool, validated VAT, IBAN, USPS, ABN, and checked for duplicates in SAP FIP. The Robot also handled vendor creation, changes, blocks, and extensions in SAP FIP following country-specific rules (European and non-European).

RESULTS

- Significant productivity gains
- Reduced volume of reworking
- Decreased manual work

Agriculture company

Capgemini

PROCESS

Intercompany reconciliations

CHALLENGE

The company's intercompany reconciliation process was fully manual and time-consuming. It involved using applications such as SAP and Excel.

SOLUTION

The UiPath Robot handled processing the creation of reports using different input forms such as ICM, exchange rates, SAP, Macro, and Excel files to reduce errors and increase efficiency.

RESULTS

- Significant productivity gains
- Reduced manual work
- Decreased volume of reworking

Agriculture company

PROCESS

Onboarding

CHALLENGE

An agriculture company's fully manual process for onboarding new hires and entering updates to enterprise resource planning (ERP) required a lot of data to be entered to complete the PA40 new hire process. The existing workflow was time-consuming, error-prone, and required significant reworking.

SOLUTION

The UiPath Robot automatically managed the new hire updates in ERP, and read details from SharePoint, validated multiple fields, and entered them back into different SAP screens.

RESULTS

- Significant productivity gains
- Reduced manual work
- Decreased volume of reworking

PCA009 | Partner: Capgemini

Leading global FMCG company

Capgemini

UiPath

PROCESS

Desktop and Citrix automation

CHALLENGE

The company---a leading global fast-moving consumer goods (FMCG) business---handled desktop and Citrix processes with a repetitive and laborious collection of tasks across various service lines. They included: peer-to-peer (P2P), order to cash (O2C), record to analyze (R2A), supply-chain management (SCM), master data management (MDM), and analytics.

SOLUTION

Both attended and unattended UiPath Robots were deployed to automate desktop- and Citrix-based applications processes, such as invoice validation and posting, tax classification, SharePoint updates, bank reconciliations, and invoice processing. A global RPA team collaboratively worked with the client in India, China, Brazil, and Guatemala, building process design documents and solution design documents.

PCA010 | Partner: Capgemini

RESULTS

- **50%** reduction in cycle time
- Reduced automation error rates
- Reduced operational costs
- Ease of scalability to extend the virtual team (Robot to cater loads)

Global BPO provider

Capgemini

UiPath

PROCESS

Business process outsourcing service delivery

CHALLENGE

The company's team was stuck with an expensive manual process that introduced errors in customer data and applications. Due to security considerations, more than 75% of their customers delivered their applications via Citrix technologies, making it vital for them to develop a solution that could deliver impeccably in remote desktop scenarios.

SOLUTION

The partner created an automation solution that would handle 150 processes for the BPO's service delivery to external customers. About 50 Robots, responsible for the 150 processes, have automatically contributed to delivering approximately 1 million transactions.

RESULTS

- **150** processes fully automated in **6 months**
- **100%** accurate automation
- **100%** data security
- **70%** human effort saved

Global financial services company

PROCESS

Reference data, pricing, & corporate actions

CHALLENGE

The company's process in the reference data set up and pricing area required manual effort that was inefficient, hurt productivity, and produced downstream errors. The operation was high volume and critical to the downstream process.

SOLUTION

Four UiPath Robots picked up custodian requests from the input queue and processed them by validating ISIN with different financial service providers. They ran in the morning, afternoon, and evening. They also carried out the activities for corporate action, including daily dividend processing, pay date checks, retro corporate actions, and retro dividends.

PT001 | Partner: Tech Mahindra

RESULTS

- **100%** automation accuracy
- **200%** productivity gain
- **12/38** full-time equivalent savings
- **60%** average handling time savings
- **75%** average handling time (pricing) savings

Leading global reinsurer

Cognizant

PROCESS

Claims management and reconciliation

CHALLENGE

As a leading global reinsurer, the company faced challenges across claims and reconciliation areas. The business processes were high-volume, low-value, error-prone manual checks and high-risk exposure tasks that needed increased accuracy or adaptability to process field values in multiple formats.

SOLUTION

By the second quarter of 2017, 21 UiPath Robots were implemented and carrying out tasks related to claimant screening, financial reconciliation, competency management, cedent claims, expense clearing, document triaging, and claims creating and updating.

RESULTS

- **40-50%** throughput increase
- More than **49** full-time equivalents saved
- Error elimination
- Substantial reduction of wrongful claims

PC007 | Partner: Cognizant

Insurance company

UiPath

PROCESS

Recovery from third-party insurers

CHALLENGE

The insurance company's claims department faced a frustrating manual process for recovering reimbursements from third-party insurers. The process was expensive and had weak control mechanisms.

SOLUTION

The UiPath unattended Robot undertook reconciliations between the disparate systems. It generated chase letters as per the defined dunning process and sent automatic emails to the defaulters. The Robot also performed cash applications in case of received payments, then followed up by deploying a predefined report of the outstanding matters on a weekly basis.

RESULTS

- Faster recoveries
- Low expense ratio
- More multi-state business
- Reduced cycle time
- Increased cash flow

0001

Global property insurer

PROCESS

Vendor payments by property insurer

CHALLENGE

The company's claims unit had challenges in releasing vendor payments within agreed service-level agreements (SLAs). The process was operating in a dual-shore environment, which added to the complexity of the operation. The company identified the process as a major contributor to vendor attrition and customer dissatisfaction.

SOLUTION

After a vendor invoice was received, the UiPath Robot validated the eligibility of the claim against each line item of the invoice. Each item was audited against a predefined validation process and exceptions were autorouted, and part payments were released and the vendor e-notified. Once approved, the balance payments were released.

0002

RESULTS

- Improved service levels by automating, converting into a **24x7** operation
- **50%** reduction in operational costs
- **70%** increase in productivity
- Reduced customer complaints
- Additional capacity creation

Auto insurance company

PROCESS

Nonrecommended hire adjudication

CHALLENGE

The auto insurer's claims unit struggled with the nonrecommended hire adjudication process that reconciled requested services from customers, such as rentals. The process operated in an offshore environment, which required Citrix-based automation. Employees used it to evaluate whether the claims should be extended, taken off hire, or closed, and then identify whether there were any potential customer complaints.

SOLUTION

When a claim approached the deadline, the UiPath Robot undertook the validation process using the claim application, the invoices of rental companies, and the hire allocation spreadsheets. Business rules and logic were built into the automation process. System exceptions were routed to the relevant departments for further action. The standardized process was replicated across 44 of the company's global claims centers.

RESULTS

- **30%** increase in process automation
- More than **65%** improvement in average handling time
- **50%** improvement in productivity

0003

Service providers for healthcare insurance company

PROCESS

Claims management

CHALLENGE

The company's process for handling claims for a leading healthcare company was slow, error-prone, and complex. Inundated with the information of 70 million people, the workflow typically saw high defect rates, resulting in lower accuracy of registrations being loaded and inefficient handling of sensitive information. Backlogs and high-turnaround time were also major pain points for the company.

SOLUTION

Seven UiPath Robots supported the claims value chain and automated 35-40% of the process on the platform. The automation improved compliance with regulatory requirements and enabled risk-free transaction processing for sensitive data.

RESULTS

- Implemented in **15 weeks**
- **68%** improvement in productivity
- **45 minutes** of manual effort saved
- More than **95%** enhancement in accuracy

0004

AA-rated trade credit insurance company

Deloitte.

UiPath

PROCESS

Credit limit request underwriting

CHALLENGE

The company was struggling with their process for underwriting credit limit requests. The work required significant repetitive manual processing and a high cost of operation. Underwriters were manually collecting data from more than 20 screens and external sources before assessing the information.

SOLUTION

The UiPath Robot automatically collected, assembled, and presented data on a dashboard for the underwriter to assess. This dropped the cycle time and processing time, allowing the underwriter to focus on high-value customer interactions. The automation also improved the quality of decisions and provided consistent validation and audit trails of underwriting data.

PD001 | Partner: Deloitte

RESULTS

- Processing time dropped from **4-18 minutes** to **2-11 minutes**
- **40-50%** reduction in cycle time
- **900** cases automated per day
- **440 hours** per month saved in the UK
- Processing time reduced by **50%**

Candidate verification service provider

Location:
Australia

Department
Human resources

Industry
Professional, scientific and technical activities

PROCESS

Academic qualifications check

CHALLENGE

The company performed manual academic checks requested by the client whenever a new worker was employed. This process required a lot of follow-ups with the universities in Australia and needed additional resources to ensure they met the requirements set by the universities on the preferred method of contacting them. The lack of workflow meant additional effort was required to track service-level agreements (SLAs) and ensure the follow-up emails were responded to.

SOLUTION

The process was reviewed and standardized by working with the product team to enable robotic process automation (RPA). Using UiPath, the attended RPA solution was applied to automate with human intervention.

RESULTS

- Implementation within **8 weeks**
- **50%** of process automation
- ROI in **8 months**
- Manual effort reduced by **40%**

PM001 | Partner: Mindfields

Candidate verification service provider

PROCESS

Employment history check

CHALLENGE

The company performed manual employee reference checks requested by the client whenever a new employee joined the client and required a lot of follow-ups to set up appointments with the previous employers. Due to the requirements set by the companies on the preferred method of contacting them, additional work-tracking sheets were maintained and utilized.

SOLUTION

The process was reviewed and standardized by working with the product team to enable robotic process automation (RPA). Using UiPath, an attended RPA solution was applied to automate the process with human intervention.

RESULTS

- Implementation within **8 weeks**
- **30%** of process automated
- ROI in **8 months**
- Manual effort reduced by **50%**
- Timely service-level agreement (SLA) monitoring and reporting

PM002 | Partner: Mindfields

Candidate verification service provider

PROCESS

Behavior reference check

CHALLENGE

The company performed manual behavior checks requested by the client whenever a new employee joined the client. This process required calls to be made to the previous employers for verification. Due to lack of workflow, additional effort was required to track service-level agreements (SLAs) and track the subsequent attempts at follow-up calls.

SOLUTION

By using speech to text, the conversation was documented and cleaned to specific standards. UiPath Robots extracted and documented the conversations before completing the checks requested by the customer.

RESULTS

- Implementation in **8 weeks**
- **60%** of process automated
- ROI in **6 months**
- Manual effort reduced by **70%**

Candidate verification service provider

PROCESS

Criminal checks

CHALLENGE

The company performed manual criminal checks requested by the client whenever a new employee joined their company. This process required physical verification of scanned documents, validation of information from forms, and data entry of information from the forms into the core system, which made it repetitive and manually intense.

SOLUTION

The process was reviewed and standardized by working with the product team to enable robotic process automation (RPA). UiPath attended Robots automated the human intervention. This created a higher standardization of the process and allowed employees to focus on higher-value work, including analysis.

RESULTS

- Implementation within **8 weeks**
- **40%** of process automated
- ROI in **8 months**
- Manual effort reduced by **25%**

PM004 | Partner: Mindfields

Credit reporting body

PROCESS

Default deletions

CHALLENGE

The company was struggling with a high-volume, repetitive process with defined rules and business logic. Due to the volume of transactions, the operational cost for this process was high. There were multiple systems, such as legacy mainframes, websites, Excel sheets, email boxes with work instructions, and internal workflow tools.

SOLUTION

Using UiPath Robotic Process Automation, an RPA solution was applied to automate the manual work in the process. The Robots doubled the task completion throughput, thus reducing the turnaround time for the cases and reducing the operational costs.

RESULTS

- Implementation within **8 weeks**
- **60%** of process automated
- ROI in **6 months**
- **60%** reduction in manual effort

PM005 | Partner: Mindfields

Credit reporting body

Location:
Australia

Department
Support and
Servicing

Industry
Financial and
insurance
activities

PROCESS

User amendments

CHALLENGE

This company's user amendment process was high volume with structured input, a repetitive process flow, defined rules, and business logic. Due to the volume of transactions, the operational cost for this process was high. There were multiple systems, such as legacy mainframes, websites, Excel sheets, email boxes with work instructions, and internal workflow tools.

SOLUTION

Using UiPath Robotic Process Automation, an RPA solution was applied to automate the manual work. RPA doubled the task completion, reducing the turnaround time for the cases and lowering the operational costs.

RESULTS

- **70%** of process automated
- ROI in **6 months**
- **80%** reduction in manual effort

Credit reporting body

MINDFIELDS
GROW FOR TOMORROW

UiPath

PROCESS

All information reporting

CHALLENGE

This company's information reporting process required data to be extracted from six different sources in the form of Excel sheets. This workflow required the report to be consolidated into one Excel reporting file. Due to the high manual intervention of the collation of data, this process was error-prone and produced inconsistent reporting results.

SOLUTION

Using UiPath Robotic Process Automation, an RPA solution was applied to automate the manual steps of the process. RPA automated the downloading and collation of reports, reducing the error rate to 0 percent.

RESULTS

- Implementation within **8 weeks**
- **100%** of process automated
- ROI in **3 months**
- **0%** error rate
- **95%** reduction in manual effort

Credit reporting body

MINDFIELDS
GROW FOR TOMORROW

UiPath

PROCESS

Refunds

CHALLENGE

This company struggled with a refunds process that was high volume with a repetitive workflow, defined rules, and business logic. Due to the volume of transactions, the operational cost for this process was high. There were multiple systems, such as legacy mainframes, websites, Excel sheets, email boxes with work instructions, and internal workflow tools.

SOLUTION

Using UiPath Robotic Process Automation, an RPA solution was applied to automate the manual steps in the process. RPA doubled the task completion, reducing the turnaround time for the cases and reducing the operational costs.

RESULTS

- Implementation within **8 weeks**
- **80%** of process automated
- ROI within **6 months**
- **90%** reduction in manual effort

PM008 | Partner: Mindfields

Credit reporting body

PROCESS

Financial division processes

CHALLENGE

The customer's financial division required their team to go to 11 websites and download all reports that pertained to a customer. As a vital check for the clients, this was a high-volume process with set rules and noncognitive tasks to complete. Due to the volume of transactions, the operational cost for this process was high.

SOLUTION

Using UiPath Robotic Process Automation, an RPA solution was applied to automate the manual work of this process. RPA doubled the task completion throughput, reducing the turnaround time for the cases and lowering operational costs.

RESULTS

- Implementation within **8 weeks**
- **40%** of automated process
- ROI in **6 months**
- **60%** reduction in manual effort

Credit reporting body

PROCESS

Online amendments

CHALLENGE

The company's online amendment process had a repetitive workflow, defined rules, and business logic. But due to the volume of transactions, the operational cost for this process was high. There were multiple systems, such as legacy mainframes, websites, Excel sheets, email boxes with work instructions, and internal workflow tools.

SOLUTION

Using UiPath Robotic Process Automation, an RPA solution was applied to automate the manual steps in this process. RPA increased the task completion throughput, reducing the turnaround time for the cases and lowering operational costs.

RESULTS

- Implementation within **8 weeks**
- **70%** process automation
- ROI in 6 **months**
- **55%** manual effort reduction

PM010 | Partner: Mindfields

Leading global financial services company

PROCESS

Daily profit and loss reports

CHALLENGE

The company's product control team struggled with manually creating 18 individual daily profit and loss (P&L) reports by reformatting general ledger (GL) data. Each day, the product control team imported GL batch and web intelligence reports into an access database or Excel files to manipulate and reformat the data into specific P&L reports. They then emailed them to the front office for review and uploaded them into the head office's web application.

SOLUTION

Each workday at 9 a.m., the UiPath Robot automatically populates the report data and runs respective macros as part of the validation and data transformation process. The Robot emails these reports to the front office for review and uploads them into the head office web application without manual intervention. This automation allows the product control team to focus on other critical activities.

PM011 | Partner: Mindfields

RESULTS

- Implementation within **3 weeks**
- **100%** accuracy rate in report generation
- Average handling time reduced from **60 minutes** to **20 minutes**
- **150 hours** per year of expected productivity savings

Leading insurance company

Location:
Romania

Department
Legal and
Compliance

Industry
Financial and
insurance
activities

FutureWorkForce

PROCESS

RCA claim file assessment

CHALLENGE

The company's root cause analysis (RCA) claim file assessment process was high-volume, repetitive, and manual. It involved document reading and structured information with predetermined rules as well as multiple screen swaps. Employees had to handle approximately 250 tasks per day with an average handling time of 12 minutes per transaction.

SOLUTION

The UiPath unattended Robots run approximately five hours per day to collect data and monitor for any errors. The Robot gathers claim file reports from internal systems, compares data and setting status, checks policy for payment validity and anti-fraud criteria, saves payment proof, checks insurers' criteria, saves screenshots, uploads relevant documents, retrieves claim assessors credentials, and sends daily and weekly reports via email.

PFW001 | Partner: Future Workforce

RESULTS

- Implementation within **6 weeks**
- Approximately **75%** of effort automated
- Average handling time reduced by **83%**, from **12 minutes** to **2 minutes**

Leading insurance company

Location:	Department	Industry
Romania	Legal and Compliance	Financial and insurance activities

FutureWorkForce

PROCESS

Claim file creation

CHALLENGE

The company's claim file creation process was manual and repetitive, involving structured information with predetermined rules. There was a large backlog on claims that impacted the company rating with the local authority. Employees had to handle 1,500 tasks per week with an average handling of eight minutes per transaction.

SOLUTION

The UiPath Robots run about 22 hours per day and constantly checked the work request location for new requests, releasing a lot of the existing backlog. They pick up the input file from the location, retrieve data and check definitions for each line, create the claim file and check internal databases, close claim files and send for payment, update statuses, and send status updates to claim assessors.

PFW002 | Partner: Future Workforce

RESULTS

- Implementation in **4 weeks**
- Approximately **75%** of effort automated
- Average handling time reduced by **25%**
- Reduced backlog from **4,000** to **0** in one month

Global retail electronics company

SYMPHONY

PROCESS

Product replacement and ticket reconciliation

CHALLENGE

The company experienced an extremely high call volume related to its product replacement process and manual ticket reconciliation process. Additionally, an automated script used to close tickets became invalid after a system change. All of this led to too much manual work and resource waste.

UiPath

SOLUTION

The company implemented UiPath Robots to automate their product replacement and ticket reconciliation workflows. Agents took calls and logged product requests as tickets. Robots accessed these tickets, added tracking numbers, and successfully resolved them. All of this helped close tickets in the company's new system without the use of scripts.

RESULTS

- Reduced cost per transaction by **50%**
- **100%** in all manual work
- Significant improvement in resources management

PSY001 | Partner: Symphony

Betting & gaming company

SYMPHONY

PROCESS

Customer response and customer service

CHALLENGE

The company used a manual approach to respond to customer requests related to suspicious activity. Employees had to extract data from many different systems and then create an Excel spreadsheet and a report in Microsoft Word. Additionally, their system was prone to activity spikes, which led to processing delays and unhappy customers.

SOLUTION

The UiPath Robot can continue working when data is missing, eliminating transaction errors and delays. The RPA output is a visually informative, comprehensive report containing all of the customer's relevant information, which has led to increased customer satisfaction.

RESULTS

- **80** manual hours saved each month
- **.5** full-time equivalents reduced in offshore resources
- Better compliance process

Financial services client

Department
Sales

Industry
Financial and insurance activities

SYMPHONY

PROCESS

Contract management

CHALLENGE

The customer relied on a manual contract management process that was an extremely complex system that included setting up, updating, tracking, and closing customers' contracts in multiple systems. The complex manual workflow resulted in errors, inefficiencies, and longer month-end close periods.

SOLUTION

A UiPath Robot completes contract worksheets by validating critical data inputs according to specific parameters. The Robot also helps with rebates by entering batch rebate information into remaining worksheets. It then flags any exceptions for employees to handle, and all results are archived and included in daily reports to maintain complete records.

RESULTS

- **400%** reduction in cycle times
- More than **960 hours** a year saved
- Reduced error rates related to manual processing

UiPath

A leading pharmaceuticals company

SYMPHONY

PROCESS

Monitoring and reporting

CHALLENGE

The company needed a better way to monitor and report on the effects of patient medication. Employees had to complete long clinical forms (more than 50 pages) and validate data in hundreds of fields. This process was repeated five times per day and took more than 15 minutes per case. The volume of quality checks was extremely high (100,000 total requests per year), representing extensive manual work.

SOLUTION

An unattended UiPath Robot manages quality check request emails and interacts with more than 130 end users each day. The Robot receives new case IDs to initiate the quality-check process. It then verifies user and case IDs, logs into the Oracle database, performs logic checks on select fields, retrieves case data, identifies and reports errors, and populates the required forms.

RESULTS

- **90%** reduction in quality-check processing time
- Record-setting achievement levels
- Modular design that can be expanded or extended to other processes

Leading healthcare technology company

Industry
Human health and social work activities

SYMPHONY

PROCESS

Revenue cycle management

CHALLENGE

Employees were performing a high number of mundane, repetitive, transactional tasks involving various software applications and systems. The company believed they could benefit from automation to save time, transform various processes, repatriate work from offshore providers, and better support information security compliance.

SOLUTION

The company rolled out an organization-wide RPA road map as well as a Center of Excellence (CoE) to grow future RPA capabilities. Successfully automating these processes helped the company reduce manual work, increase the overall quality of data, and improve data security.

RESULTS

- **2,300** hours per month saved
- Reduced number of manual, repetitive transactions
- Repatriated offshore work
- Reduced errors

UiPath

Leading healthcare technology company

Department	**Industry**
Finance, Accounting and Tax	Human health and social work activities

SYMPHONY

PROCESS

Extraction of bank statement data

CHALLENGE

Employees at the company were securely extracting bank statement data from many different bank websites. They would download bank statements in Word, PDF, and Excel format (Excel statements all had to be manually reformatted), save them to a shared drive, and then refer to a list of credentials to log into each client's bank account – all on a daily basis.

SOLUTION

Using a built-in credential list, the UiPath Robot uses valid bank credentials to securely log into the account and download the appropriate statement. It also formats all Excel spreadsheets in a matter of seconds, saves the file, and names it to comply with the company's standardized naming conventions to improve auditing and record-keeping. The entire process runs in the morning, so the statements are ready for employees as they begin their day.

PSY006 | Partner: Symphony

RESULTS

- More than **18 hours** per month saved
- Increased data security with automated credential management
- Standardized the complete bank reporting process

Leading healthcare technology company

Department	Industry
Finance, Accounting and Tax	Human health and social work activities

SYMPHONY

PROCESS

Electronic remittance advice

CHALLENGE

Electronic remittance advice (ERA) posting is the daily process of posting medical insurance payment transactions for clients, including details about providers' claims payments. The company's ERA process required employees to manually read bank statements, enter data, and even memorize key inputs. The entire process was very repetitive and led to too many errors.

UiPath

SOLUTION

Using RPA, the company automated the process related to pulling bank statements. An unattended Robot now extracts the correct data, reformats the downloaded bank statement, and performs the necessary data entry steps. The UiPath Robot also uses built-in, decision-flow intelligence to post remittance data based on predetermined qualifications.

PSY007 | Partner: Symphony

RESULTS

- More than **480 hours** per month
- Reduced errors related to manual processes
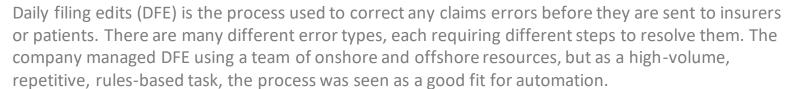- Reduced offshore full-time equivalent headcount by **18**

Leading healthcare technology company

SYMPHONY

PROCESS
Daily filing edits

CHALLENGE
Daily filing edits (DFE) is the process used to correct any claims errors before they are sent to insurers or patients. There are many different error types, each requiring different steps to resolve them. The company managed DFE using a team of onshore and offshore resources, but as a high-volume, repetitive, rules-based task, the process was seen as a good fit for automation.

SOLUTION
The UiPath automation includes a reporting process that extracts and communicates rules-based information and errors, which is used in DFE analysis and improving business processes.

RESULTS

- Implementation in **4 weeks**
- More than **1,850 hours** per month saved
- Reduced offshore full-time equivalent headcount by more than **45**

Leading healthcare technology company

SYMPHONY

UiPath

PROCESS

Claims status investigation

CHALLENGE

Insurance claims that don't have any activity for a certain period of time require specific actions, such as entering data in a mainframe or communicating with payers. Yet attempting to identify the status of each claim is a repetitive, time-consuming task that involves navigating, searching, and collecting data from many different payers' websites.

SOLUTION

The UiPath Robot receives claims reports, checks their status online, identifies specific actions to be taken, and processes the reports accordingly. It flags any remaining actions to be taken and communicates them to claims agents. The entire UiPath Platform is completely modular in order to easily expand and scale across additional sites and processes.

RESULTS

- Improved quality of data by reducing human errors
- Successfully repatriated offshore work to onshore facilities
- Developed a scalable solution that could be deployed across different providers and sites

PSY009 | Partner: Symphony

Transportation company

Location:
Europe

Department
Call Center / Contact
Center

Industry
Transportation
and storage

UBIQUITY

UiPath

PROCESS
Chatbot integration

CHALLENGE
The company's employees were responsible for manually responding to customers' requests for order updates, tracking, and other information. The manual approach wasted valuable time and effort and inadvertently led to higher-than-expected process errors and unhappy customers.

SOLUTION
The company realized that many of these requests were highly repetitive tasks that could be automated by integrating UiPath RPA and chatbot technology. This integration reduced processing and response times, increased the total number of contact channels, freed employees to focus on more strategic work, and enhanced customer satisfaction.

RESULTS
- **75%** reduction in processing times
- Response times were reduced from **229 hours** to **60 hours** (based on 5,000 requests)
- **100%** automation rate

Car rental company

UBIQUITY

UiPath

PROCESS

Data processing

CHALLENGE

The company relied on a manual approach to transfer and store customers' vehicle rental contracts that had an average handle time of 8 to 14 minutes per transaction. It also required 6 to 30 employees (fluctuation based on seasonal demand) to manage administrative tasks related to manual processes—time that would be better spent with customers.

SOLUTION

Two UiPath Robots automated the company's data processing operations and now process more than 700 contracts each day. Previous manual efforts have been virtually eliminated, and employees have more time to provide valuable customer service.

RESULTS

- Implementation within **3 months**
- **100%** of manual effort automated
- Error rates were reduced to **3%**
- Processing times were reduced by **85%**

Loan servicer

Department
Support and Servicing

Industry
Financial and insurance activities

PROCESS

Claims, denials & credit dispute processing

CHALLENGE

The company's claims, denials, and customer credit dispute processes were slow, manual, and cost their team valuable time and resources. This cumbersome workflow was affecting employee morale, hurting the bottom line, and limiting their team's ability to serve customers.

SOLUTION

With the guidance of UiPath Partner Accelirate, the company saw immediate return on investment after they implemented Robots to automate three processes. They have continued to expand their RPA program to alleviate their team's workload, improving employee experience, saving money, and allowing team members to focus on higher-value, customer-focused work.

RESULTS

- Implementation in **90 days**
- **$18,600** saved each month
- **930+ hours** saved per month

PA001 | Partner: Accelirate

Large energy company

Department
Support and Servicing

Industry
Electricity, gas, steam and air conditioning supply

ACCELIRATE
Accelerating Automation

UiPath

PROCESS

Electronic ticketing support and accounts payable

CHALLENGE

The large energy company was stuck providing electronic ticket support and processing accounts payable work with a cumbersome, time-intensive workflow. The process required employees to manually work through information from their system, taking valuable time that could be better spent on customers.

SOLUTION

The Partner used the UiPath Enterprise RPA Platform to support two process automations. The success they've seen using the Robots has inspired the company to expand their RPA program and automation efforts.

RESULTS

- Implementation within **90 days**
- **$15,200** saved per month
- **760+ hours** saved per month

PA002 | Partner: Accelirate

Higher education company

Department
Support and Servicing

Industry
Education

PROCESS

Accounts receivable and enrollment processing

CHALLENGE

The higher education company was frustrated with the high error rate and cost associated with their manual accounts receivable and enrollment processes.

SOLUTION

After partnering with Accelirate, the company was able to streamline three processes using RPA. They've had such success with the processes and were so pleased with the ability to customize the Robots to their exact needs that the organization has decided to expand their automation efforts moving forward.

RESULTS

- Implementation in **90 days**
- **$20,900** saved each month
- **1,030+** hours saved each month

PA003 | Partner: Accelirate

National loan servicing provider

Department
Call Center / Contact Center

Industry
Financial and insurance activities

PROCESS

Accounts receivable and enrollment processing

CHALLENGE

Loan servicing providers are subject to a complex system of regulations from the federal government and must classify loans correctly in order to receive Fannie Mae and Freddie Mac incentives. This process was handled manually and required team members to assess more than 10,000 loans daily with 33 different loan statuses based on 42 indicators and five priority levels. It wasted valuable staff time, opened the company up to penalties, and was generally inefficient.

SOLUTION

To decrease loan processing time and support the increasing workload, Accelirate worked with the company to implement a UiPath Robot to automate the process. The Robot was able to easily classify all loans based on indicators, statuses, and priority levels before assigning each account into one of three categories: loss mitigation, bankruptcy, or foreclosure.

RESULTS

- **$50,000** monthly revenue increase
- **5,200+** hours saved

PA004 | Partner: Accelirate

National loan servicing provider

Department
Sales

Industry
Financial and insurance activities

PROCESS

Buyer identification

CHALLENGE

Each month the company was wasting human resources by manually mailing out offers to buyers to refinance. This was cumbersome and ate up time that could have been better spent with customers.

SOLUTION

Using the UiPath Enterprise RPA Platform, the Partner worked with the company using an exploratory data analysis to create a machine learning algorithm. After training and optimizing it, the model could identify which buyers were most likely to refinance and reduced the number of offers mailed out. This saved staff time, increased response rates, and boosted the number of borrowers who refinanced.

RESULTS

- **20-25% r**eduction in unanswered letters sent
- **10%** increase in response rate

PA005 | Partner: Accelirate

National loan servicing provider

Department
Support and Servicing

Industry
Financial and insurance activities

PROCESS

Processing mortgage breach letters

CHALLENGE

The company was struggling with its process for handling and sending mortgage breach letters. The workflow, which involved aggregating data from multiple systems, was cumbersome and wasted staff resources.

SOLUTION

With Accelirate's expertise, the UiPath Enterprise RPA Platform was used to build a Robot that gathered all relevant default loan information, determined how the loan default should be labeled, and compiled the information into U.S. State Specific Breach Letters to be sent out to borrowers. The automation successfully handled the increased volume of loans and reduced management cycle time and employee overtime. fa

RESULTS

- **$145,000** in annual savings
- **3,800+** hours saved

Online education service provider

PROCESS

Invoice processing

CHALLENGE

Each month, the company's employees had to manually create a list of clients that required an invoice for services rendered and determine the correct customer segment for each one before sending emails to them. This was frustrating, time-consuming, and wasted resources.

SOLUTION

The UiPath Robot generates a list of clients that need an invoice and automatically determines which customer segment out of nine is the best match. From there, it prepares and emails the invoice, saving staff time and allowing employees to focus on higher-value tasks.

RESULTS

- **$225,000** saved annually
- **360+** hours saved

Online education service provider

PROCESS

Enrollment document processing

CHALLENGE

Each time a new student enrolls, the parent must submit verification documents to complete their registration. The company's employees had to manually process and approve the information before students could start their online classes. This process was inefficient for staff and slow for students

SOLUTION

Using a machine learning solution, UiPath Robots receive and filter incoming documents and merge multiple PDFs, approve or deny the submission, and notify the parent if additional documents are needed. This automation frees up staff for more important work, reduces processing cycle time, and compensates for increased volume during high-demand times.

RESULTS

- **20%** monthly payroll savings
- **1,000+ hours** saved

PA008 | Partner: Accelirate

Leading petroleum and natural gas company

Location:
California

Department
Procurement and Supply Chain

Industry
Mining and quarrying

PROCESS

Enrollment document processing

CHALLENGE

Each month the company received vendor-sent invoices for review, verification, and accounts payable processing. Each transaction was internally recorded so that it could be compared to vendor copies. During high-volume times, the team would skip the verification step if an invoice was under a certain amount because it wasn't worth the extra processing time. This was a manual, heavy-lift process for their team and wasted valuable man-hours each month.

SOLUTION

The UiPath Robot compares the two invoice versions and validates them for payment. It's able to scale to demand, increasing efficiency and reducing the need for employee overtime.

RESULTS

- **25%** monthly payroll savings
- **160+ hours** saved per month

Leading petroleum and natural gas company

Location:
California

Department
Support and Servicing

Industry
Mining and quarrying

PROCESS

Wells management processing

CHALLENGE

The company's wells management process was time-intensive, manual, and wasted staff time. It created a backlog and prevented the jobs completed lists from being updated in real-time.

SOLUTION

The UiPath Robot more efficiently performs the wells management process, collecting employee work tickets faster and reducing processing cycle time. With automation, tickets in the management system are up-to-date at all times, and the processing delay has been eliminated.

RESULTS

- **65%** monthly payroll savings
- **400+ hours** saved per month

PA010 | Partner: Accelirate

Leading petroleum and natural gas company

Location:
California

Department
Finance, Accounting and Tax

Industry
Mining and quarrying

PROCESS

Invoice processing

CHALLENGE

The company's employees had to manually check which invoices were overdue and why each month, including checking which invoices weren't available for download or if the email delivery had failed. This took valuable time away from higher-value work.

SOLUTION

The UiPath Robot automatically checks to see if invoice delivery was unsuccessful and notifies brokers if there was an issue. It then extracts email addresses for billing contacts, locates and categorizes invoices that are overdue, and emails the customer to let them know their payment is past due.

RESULTS

- **20%** monthly payroll savings
- **1,200+** invoices processed each month

National bank and holding company

PROCESS

Claims allocation

CHALLENGE

The company's manual claims allocation process was inefficient, inaccurately allocated cash, and resulted in a work backlog. It wasted employee time that could be better spent.

SOLUTION

The UiPath Robot logs into the claims-tracking system, updates and creates new daily tracking sheets, and correctly allocates cash claims. It then opens the payment ledger report, enters all claim information, and updates the status of each claim in the system. This automation frees up staff, increases accuracy, and supports real-time updates.

RESULTS

- **$3,900+** monthly payroll savings
- **170+ hours** saved per month

National bank and holding company

Department
Other

Industry
Financial and insurance activities

PROCESS

Task management

CHALLENGE

After the company had automated various UiPath Robots, it found itself in need of a way to manage the work of those automations. Using a human team wasn't time- or cost-effective and took employees away from higher-value work.

SOLUTION

After seeing large success with other RPA Robots, the company decided to use another Robot to manage the work of their automation overall. The Robot tracks, logs, and reports on the activity of other deployed Robots. If exceptions arise, the management Robot emails a concise daily report of jobs completed and notifies administrators as needed.

RESULTS

- **$4,800+** monthly payroll savings
- **200+** invoices processed per month

PA013 | Partner: Accelirate

Global storage & transport equipment supplier

Location:
USA

Department
Procurement and
Supply Chain

Industry
Transportation
and storage

eAlliance

PROCESS

Entry reclassification

CHALLENGE

Each month, the company had to reclassify each freight journal entry after customers made credit card payments. The payment caused the sale to be automatically credited to a revenue account, which meant employees had to run trial balances for freight revenue accounts, download the reports, read them into a desktop reporting tool, run models, produce and format Excel files, launch macros, and feed the file into the General Ledger before the entry was reclassified from revenue to expense.

SOLUTION

The UiPath Robot mimicked the previously manual process, shortening the time required and eliminating errors. This created a more standardized process and allowed employees to focus on higher-value work.

RESULTS

- Implementation with **5 weeks**
- **100%** rate of automation
- ROI in **5 months**
- Processing time reduced by **85%**
- Manual effort reduced to **5%**

PE001 | Partner: eAlliance

Global storage & transport equipment supplier

| Location: USA | Department Procurement and Supply Chain | Industry Transportation and storage |

PROCESS

Trial balance and reconciliation

CHALLENGE

The company had to run multiple trial balance detail reports each month for every operating unit. This had to be done numerous times and required employees to download the reports as input to their desktop reporting tool, produce an Excel file, and perform the reconciliations within Excel. It wasted time that could be better spent on higher-value work.

SOLUTION

The UiPath Robot instead completely mimicked the previously manual workflow, eliminating long waiting times during the mission-critical month end close period. This let analysts spend their time on key decisions, like how to handle exceptions, rather than on repetitive tasks.

RESULTS

- Implementation in **6 weeks**
- **100%** rate of automation
- ROI in **3 months**
- **95%** reduction in processing time
- Manual effort reduced to **10%**

Global storage &
transport equipment
supplier

Location:	**Department**	**Industry**
USA	Procurement and	Transportation
	Supply Chain	and storage

PROCESS

Income statement processing

CHALLENGE

Each month, the company had to run multiple income statements for each operating unit numerous times because entry changes and reconciliations were done during the month-end close. Employees had to manually download these income statements to their desktop reporting tool, produce their income statements in presentation-quality format using Microsoft Office. This repetitive work took employees away from higher-value work.

SOLUTION

The UiPath Robot instead performed this workflow automatically, eliminating long waiting times during the mission-critical month-end close period. This let analysts focus on producing financial reports faster.

RESULTS

- Implementation in **4 weeks**
- **100%** rate of automation
- ROI in **4 months**
- **95%** reduction in processing time
- Manual effort reduced to **5%**

Global manufacturing leader

eAlliance

PROCESS

Daily bank reconciliation

CHALLENGE

Every day, the company had to reconcile payments received through lockbox or other means and make required adjusting journal entries for sweep accounts, bank charges, accounts payable activity, and other non-accounts receivable activity that affected cash. This labor-intensive process took employees about an hour a day to manually carry out.

SOLUTION

Instead, the UiPath Robot now automatically downloads bank statements and lockbox files into enterprise resource planning (ERP), runs the reconciliation process, ties out the items that don't reconcile (approximately 20%), notifies the analyst of items that need attention, and makes the required adjusting journal entries.

PE004 | Partner: eAlliance

RESULTS

- Implementation within **10 weeks**
- **95%** rate of automation
- ROI in **3 months**
- **95%** reduction in processing time
- Manual effort reduced to **5%**

Global automotive supplier

Location:
USA

Department
Sales

Industry
Wholesale and
retail trade

eAlliance

PROCESS

Fulfilling sales orders

CHALLENGE

The company's customer service representatives had to log into the portal daily to review purchase orders (POs) from the world's largest online retailer through the retailer's portal. This involved manually looking over hundreds of PO lines per order by checking available inventory within a 24-hour period. This repetitive work wasted staff time and caused data entry errors.

UiPath

SOLUTION

The UiPath Robot took over the process by running enterprise resource planning (ERP) backfill reports to see available inventory, logging into the retailer's portal, performing two-way verification during login, and acknowledging all PO lines accurately by cross-referencing backfill reports. This allowed employees to focus on higher-value, customer-facing work.

PE005 | Partner: eAlliance

RESULTS

- Implementation in **8 weeks**
- **100%** automation rate
- ROI in **4 months**
- **0%** error rate
- Manual effort reduced to **5%**
- **95%** reduction in processing time

PROCESS

Creating sales orders

CHALLENGE

The company's employees had to manually retrieve sales orders from one of their clients through their client's portal. This required them to gather all order information to create the sales order in their enterprise resource planning (ERP) system, key and rekey data, and reference multiple applications. This wasted employee time and company resources.

SOLUTION

Now, the UiPath Robot logs in to the client's portal, gathers all required information, references other applications, creates the sales order, and attaches a signed purchase order to the sales order. This improves the efficiency of customer service representatives and saves the company money.

RESULTS

- Implementation in **9 weeks**
- **100%** rate of automation
- ROI in **5 months**
- **0%** error rate
- Manual effort reduced to **5%**
- **95%** reduction in processing time

Global automotive supplier

Location:	Department	Industry
Australia	Support and Servicing	Financial and insurance activities

PROCESS

Document processing with Python

CHALLENGE

The Australian mutual company wanted to find a way to integrate RPA with Python to reduce costs and workload for staff, while improving compliance. However, as their center of excellence discovered, their unstructured data and rigorous regulations created a high degree of complexity when automating.

SOLUTION

Using the UiPath Enterprise RPA Platform, AU integrated RPA with Python to process unstructured data, improving customer service, reducing costs, increasing capacity, improving throughput and accuracy, and boosting scalability. The Robot downloads PDF forms from an internal SharePoint folder, converts the files to text for extraction, extracts data from text file for 250 fields, transforms it into a structured format, and creates a client record in the system.

CA001 | Customer: Australian Unity

RESULTS

- Implementation within **6-8 weeks**
- **22,493 hours** of manual labor saved in **8 months**
- **42,000** transactions processed in about 1 year
- **94%** success rate
- **0%** error rate
- **87%** reduction in processing

European public service organization

Atos

PROCESS

Misc. admin processes

CHALLENGE

The organization provides crucial central government services that the public relies on daily. A large number of manual admin processes were costing the business time and money. They were exploring RPA to complement an overall initiative to shift from legacy operations to online and self-service processes. They needed an RPA solution that complemented future artificial intelligence (AI) and cognitive automation capabilities.

SOLUTION

After a five-week study, the organization identified UiPath as the best RPA vendor for their needs, based on its architecture, processing ability, support, cost of ownership, and ease of use. Automations were created in UiPath Studio, modularised to allow flexibility, and supported by a core team of developers and webinars.

RESULTS

- Time spent on processes reduced to **25%**
- **7%** reduction in human error rate
- **100** hours per week saved
- Process run time cut to **25%** of original time
- **140 hours** per week of run time saved

PAT001 | Partner: Atos

PROCESS

Manual journal-entry processing

CHALLENGE

EDF Energy is the largest supplier of low-carbon electricity in the UK, employing around 12,500 people and servicing more than 5 million domestic-product accounts. Their robotics Center of Excellence (CoE) identified their manual journal-entry process for automation. The journal recorded all financial transactions across the company. Each time a new entry was added, a team member had to manually review it and then enter it into the enterprise resource planning (ERP) system.

SOLUTION

After forming a Robotics Center of Excellence (CoE), the company identified the financial share service centre as a great candidate for RPA. The UiPath Robot picks up the entries, checks that they're in the correct format for the ERP system, and inputs the entries. It also contacts team members if errors arise. The UiPath Platform allowed the company to start with one Robot and build out more as needed.

CE001 | Customer: EDF Energy

RESULTS

- Implementation in **6 months**
- **£100,000** saved in software license and development costs
- **70 man-hours** saved per month
- **£50,000** estimated annual savings
- **2x** the volume handled by Robots

Location:
Global

Department:
Other

Industry
Financial and
insurance
activities

LOMBARD INTERNATIONAL ASSURANCE

PROCESS

Investment admin and monitoring processes

CHALLENGE

The company partners with advisors of high-net-worth individuals and institutions to create secure futures for clients. After establishing a Center of Excellence, the company saw that their investment admin and investment monitoring processes were manual and time-consuming and could be improved with automation.

SOLUTION

The company was able to quickly ramp up automation across multiple processes, relieving employees of manual work and freeing them up for higher-value tasks. RPA helped the company increase productivity; reduce errors rates; and improve client services, compliance, and risk management.

RESULTS

- Implementation in **3-4 weeks** per process
- **8,000** labor hours saved
- Overall workload reduced by **20-50%**
- Reduced error rates to **1-3%**

CL001 | Customer: Lombard International Assurance

Global professional service company

Location:
Global

Department:
Other

Industry
Professional, scientific, and technical activities

PROCESS

Misc. processes across company

CHALLENGE

The company wanted to appeal to a younger generation of employees, ambitiously deciding to roll out automation solutions across the business after reviewing their existing processes and seeing that they had a unilateral issue with manual work.

SOLUTION

In the largest RPA rollout in history, the company saved millions of staff hours and dollars per year, generated new revenue streams, and completely transformed its services strategy. With a group of citizen-developers in each department, they created a Robot for each employee to relieve them of manual work and allow them to focus on higher-value tasks. The goal demonstrated the great scalability of the UiPath Platform.

0005

RESULTS

- **Hundreds of thousands** of Robots deployed
- **Millions** of staff hours saved
- More than **half a billion** hours saved in labor
- **100%** staffing rate on future projects

Shared-services arm of insurance group

Location:	Department:	Industry
Europe	Support and servicing	Financial and insurance activities

UiPath

enate

PROCESS

Core insurance processes

CHALLENGE

As part of one of the largest insurance groups in the world, the company delivers policy, fund administration, and other services to corporate entities. The manual process for doing this wasted employee resources and time and created unnecessary errors. The main challenges they faced were too many emails and too little time, as well as a reduction in employee morale.

SOLUTION

Using the UiPath Enterprise RPA Platform, the company was able to automate tasks that involved tracking Excel spreadsheets and data from multiple sources, such as emails, phone calls, and other applications. This automation decreased overtime, increased employee satisfaction, and reduced processing time.

PE001 | Partner: Enate

RESULTS

- **80%** reduction in processing time
- **56%** reduction in email resolution time
- **38%** reduction in phone-call volume
- **70%** reduction in end-to-end cycle times
- **75%** reduction in overtime

| **Location:** | **Department:** | **Industry** |
| UK | Legal and compliance | Arts, entertainment, and recreation |

L&W

UiPath

PROCESS

Customer verification, payment reconciliation

CHALLENGE

Ladbrokes knew RPA could help reduce errors and save time, but their first attempt at automation hadn't gone well. As one of the UK's largest betting and gambling companies, their manual processes touch the experience of many customers.

SOLUTION

With UiPath, automation transformed their core processes in the customer-compliance operations department and improved customer experiences. After selecting four pilot processes, including e-wallet balance reporting, the company saw dramatic reductions in processing times, saving effort and freeing employees up for other work. Because of this success, they decided to apply RPA to their Know Your Customer process, which verifies ID documents of customers and escalates the case to a customer service rep if an error is detected.

CLA001 | Partner: Lawrence & Wedlock | Customer: Ladbrokes Coral Group

RESULTS

- **88%** faster than manual processing
- **322** applications processed
- **48** man-hours saved per month
- **100%** accuracy
- **7,000** customer verifications handled in the first 4 weeks
- **11,000** hours saved in the first

CLARIANT

| Location: Switzerland | Department: Support and servicing | Industry Professional, scientific, and technical services |

PROCESS

Invoice data extraction, verification & shipping logistics

CHALLENGE

The company receives invoices and shipment orders from thousands of vendors all over the world. They struggled with a manual process for extracting, verifying, and coordinating information that was slow and prone to errors. Manually entering and checking data was labor-intensive, and important stakeholders were often left waiting for manually communicated shipping updates.

SOLUTION

With UiPath Robots, they were able to successfully automate significant portions of the invoice process and free employees for other work. Clariant was also able to eliminate delays for shipping updates and automate portions of the shipping process, removing the need for printed documents. These pilot programs were so successful that Clariant is now building to a vision whereby 20% of the productivity in its shared-services centers will be the result of RPA by 2022.

CC001 | Customer: Clariant

RESULTS

- **80%** of invoices are processed automatically
- **2,500** invoices processed per month
- **40,000** printouts are saved per quarter

UiPath

Government healthcare agency

Department:
Call Center / Contact Center

Industry
Human health and social work activities

PROCESS

Call centre support processes

CHALLENGE

The agency was overwhelmed by 15 million calls per year that had to be supported with manual, repetitive processes at their call centre. Previously, agents had to manually check caller information, match it with additional details from several platforms, and help guide the customer through the menu and account options.

SOLUTION

Using the UiPath Platform, the organization now has Robots that automatically detects when agents pick up calls, grab the relevant Medicare number and identifying information from the Genesys Interface, flag a representative when human judgement is needed, and create the correct case in Microsoft Dynamics CRM at the end. This automation has saved valuable staff and customer time, as well as set the company up for future AI-based chatbot automation.

0006

RESULTS

- Implementation in **6 months**
- **38%** reduction in average handling time
- **80%** human labor utilization rate
- **49.6%** reduction in labor cost

UiPath