



ROBOTIC PROCESS AUTOMATION (RPA)

# 61 RPA Use Cases / Applications / Examples: In-Depth Guide [2019]

SEPTEMBER 7, 2019 · 19 MINUTE READ

★★★★★ 4.6 (17)

We explained Robotic Process Automation before. RPA has a fancy name and >50 solution providers, however few people I have spoken to could pinpoint exact areas where RPA can be applied.

So we prepared the most complete list of all RPA use cases/application areas and categorized them to in 5 buckets:

1. Common business processes and activities
2. Activities in commercial functions
  1. Sales
  2. Customer Relationship Management
3. Activities in support functions
  1. Tech Support
  2. Technology
  3. Finance
  4. HR
  5. Operations
  6. Procurement
4. Industry specific activities
  1. Banking
  2. Insurance

### 3. Telecom

### 4. Retail

### 5. RPA applications for personal use such as digital assistants

## Common business processes and activities

### 1- Quote-to-cash

Every business needs to sell to survive. issues in the operations side of selling can result in customer complaints or selling at reduced prices due to clerical errors.

Automating complete sales operations process eliminates these errors and provides fast service to your customers. Since automation processes sales faster than manual processes, customers will receive invoices earlier, leading to earlier payments and improved cash flow. This can also be simpler process to automate since it mostly relies on company's structured data to generate invoices to be sent to customers.

### 2- Procure-to-pay

Since procure-to-pay process involves extracting invoice and payment data from multiple systems like enterprise resource planning (ERP), customer relationship management (CRM), banks, vendors, logistics companies and since not all these systems provide easy integration methods they generally involve some form of manual labor. RPA bots can fill integration gaps. Since they work on the front-end, they can provide an easy way to automate integrations.

With a fully automated procure-to-pay, you can ensure that procurement best practices are followed and there's a single source of truth for all transactions.

Here's a case study on invoice processing which is one of the important activities of procure-to-pay process:

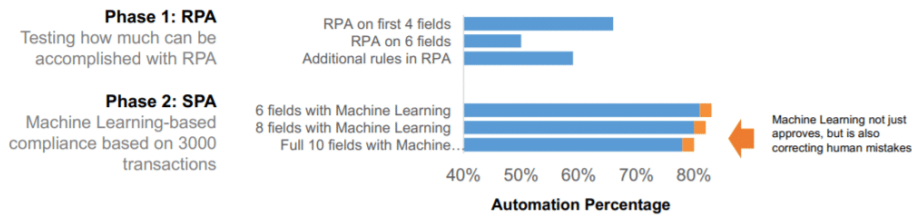
## Enterprise Supply Chain: Invoice Processing Case Study

Level 4 Invoice Compliance Process: Compliance Check of Third Party Invoices processed for payment through Procure to Pay system

### Overview of the Process

**Low coverage:** 10% checked only  
**Highly unstructured:** Invoices from Third party vendors in pdf or tiff format  
**High-volume:** 1000s of transactions/month  
**Time-sensitive:** Same Day Processing  
**Global:** 80 countries

### Intelligent Automation Solution



### Business Value Outcome

Average of 60% STP with RPA, 86% STP with SPA/Machine Learning Applied  
 93% Quality (increase of >20% from Manual Process)  
 Decreased Invoice cycle time from 6-8 minutes to 30 seconds (3,000+ volume/mo), which decreased SLA breach by 70%  
 Replicable process and configuration for accelerated roll out in subsequent Invoice Processing areas

**67 FTE savings @ \$60,500 fully loaded cost per FTE (\$4.05MM)**

**Benefit to Enterprise:** Part of strategic effort to decrease costs in Enterprise Operations by >50% over five years



WorkFusion Automation Quick Start Guide

## 3- Customer onboarding

Most B2C businesses have a customer onboarding process that is critical to reduce churn and get customers to start using the product. Using OCR and cognitive automation, most customer onboarding actions can be completed instantaneously even in companies that rely on legacy systems, greatly improving customer experience.

Workfusion's case study explains how they achieved Straight Through Processing (STP) in a major bank's customer onboarding process and reduced onboarding time from 20 days to 5 minutes.

## Other activities common to many business functions

We listed above some major end to end process where RPA can be applied but there are other use cases as well. RPA provides your teams a Swiss Army knife of automation and they should be using it as automation opportunities arise. Some other areas where RPA has been used are:

## 4- Data migration and entry

Legacy systems still perform critical functions at companies. For example legacy billing systems need to interface with other systems and such systems may not have the capability to pull relevant data from APIs. In such cases, employees manually migrate data using formats like CSV. RPA can prevent such manual labor and potential clerical errors it brings.

Furthermore such systems that keep data up to date enable improved analysis and decision making. We are living in a day when even marketing has 5000 applications to choose from. RPA can help integrate applications and allow for more holistic analyses.

## **5- Data updates**

Most departments including HR, customer service and marketing routinely need to update customer/personnel data which is constantly changing. Setting up bots for auto updating relevant data from forms or email can ensure that departments can access fresh and correct data.

## **6- Data validation**

Most data validation controls can be embedded in databases. However, there's data validation tasks such as cross checking data against publicly available data, for which RPA automation is more suitable than other tools

## **7- Extracting data from PDFs, scanned documents and other formats**

Screen scraping, OCR (Optical Character Recognition) and basic pattern recognition technologies enable data extraction from almost any format, reducing the need for keying in data.

## **8- Periodic report preparation and dissemination**

Every business requires regular reports to inform managers and ensure team are aware of their progress. Preparing such reports and sending them over every week or month is not labor intensive but it distracts employees. RPA solutions can easily auto-generate reports, analyze their contents and based on the contents, email them to relevant stakeholders.

For example, a report of a telecom operator showing areas with connectivity issues has different recipients based on its severity. CTO should be copied in reports with critical issues and head of network should be copied in reports with major issues. RPA bots can analyze reports to modify recipients according to provided criteria.

## **9- Generating mass emails**

Mass emails relying on data from multiple systems are painful to produce manually. Especially if you are sending them frequently, consider automating the process.

# Activities in commercial functions

## Marketing

### 10- Lead nurturing

Leads arrive through a myriad of channels such as LinkedIn, lead collection forms and vendors. Argos Labs shares a simple example of how they automate nurturing leads from LinkedIn in their [RPA+ Assistomation video](#).

## Sales


Though sales personnel should be focusing on building relations and selling, in most organizations most of their time is spent on operational activities.

RPA offers a method to automate those activities:

### 11- Creating and delivering invoices

This is a case of data replication. Same sales data needs to exist in both CRM and accounting systems. Instead of manual data replication, bots can update accounting records, prepare and deliver invoices from the right email accounts.

### 12- Updating CRM

if it is not salesforce then it doesn't exist meme ile ilgili görsel sonucu

Source: [memegenerator.net](http://memegenerator.net)

Updating interactions to CRM is time consuming and unproductive yet necessary. Because Salesforce acts needs to act as the source of truth regarding customer interactions. That's why there are [mugs, T-shirts](#) and all sorts of memes about "If it is not in salesforce, then it doesn't exist."

There is an emerging class of solutions that allow companies to integrate their email, call and other communication data to CRM. If you can not find a good solution for the CRM system you are using, you could write a simple bot to update your CRM records with customer contact data.

## 13- Updating scorecards

Companies that lack integration between HR and CRM systems can leverage RPA bots to ensure that changes in CRM are uploaded to scorecards so sales reps can see their progress real time..

## Customer Relationship Management

Customer contact centers rely on a number of different systems provided by a variety of vendors. Level 1 contact desks mostly process a high volume of simple repetitive tasks, an ideal match for RPA.

A customer rep needs to understand the customer's intent, perform the necessary actions by switching between different systems and applications and inform the customer. This has several disadvantages, customer needs to wait while the rep is busy dealing with data, sometimes asking for information that had been asked before. This reduces customer satisfaction and increases call duration. It's one of the rare examples of a company wasting its resources while creating dissatisfaction for its customers.

The solution requires identify frequent customer queries, examine customer rep actions in response to these queries and build RPA solutions to facilitate those actions. There can be a variety of solutions:

- Customer rep can launch a bot whenever several pieces of data need to be synchronized across systems. With the press of a button, the bot completes all actions in milliseconds. This is a simple RPA implementation that can be programmed within hours and create value quickly.
- A dashboard can be created for common queries. Customer rep will fill the necessary data to resolve the issues and bots will use that data in several systems to complete the transaction. Such dashboards will require more effort but still are feasible to create within weeks for most common actions.

These are the typical use cases where such automation solutions can be employed to automate high frequency/repetitive tasks:

**14- Loading a detailed customer profile** customer including her previous interactions with support

**15- Getting detailed billing data.** Whenever you call customer service regarding your most recent payment, you need to stay on the line for a minute or two while the customer service rep scrambles to pull your record and understand it. With an RPA bot programmed to retrieve that data, your payment data can be invoked in seconds with a single click from the rep.

## 16- Updating user preferences and other user information

**17- Resolving simple but common customer issues.** For example, resetting a broadband customer's connection to the server can fix some simple connection issues. This can be done without switching screens with a simple RPA bot.

## 18- Automating multi-step complex tasks that require little decision making

Some legacy systems force customer service reps to complete numerous steps to complete some common tasks. If these steps do not require human judgement, they can easily be automated, saving significant time.

# Activities in support functions

## L1 Tech support

Without increasing automation capabilities, IT support teams can find themselves overwhelmed with simple yet time consuming queries. This not only results in slow service but also demotivates most support personnel who do not enjoy repetitive tasks that do not challenge them intellectually.

Bots can automate various complex system administration tasks around IT applications and infrastructure, including tasks such as:

**19- Regular diagnostics:** It's painful to hear the same problem from multiple people. And that's exactly what happens when a system has a catastrophic failure. As teams work to resolve the problem, they also need to deal with calls of colleagues asking when the system would be up. Regular diagnostic work by bots puts tech support teams one step ahead of all other teams and lets them respond to possible failures before they can be noticed by regular users. This improves both user satisfaction and saves support personnel from wasting time on calls about problems they already know about.

Argos Labs shared a good example on regular diagnostics. A bot regularly checks live camera status to ensure that issues are spotted before they are noticed by users.

## 20- Fault remediation

## Technology

## 21- Opening up internal tools to customers or employees

Almost all customer service or tech support departments have internal tools with advanced functionality. They rely on service reps to use those tools and serve internal or external customers. Especially if those tools are in legacy systems, it is difficult to expose them directly to customers or employees without training. However RPA offers a solution.

Frequency of usage of most functionality follows the pareto principle. A few functionality are quite commonly used while the rest are almost never used. After identifying the popular functionalities of an internal tool, it is possible to write simple web interfaces that complete those functionalities with the help of bots. This saves users time while reducing burden of support teams.

## 22- Software installations

RPA can enable single click installations of complex systems with interdependent components.

## 23- Automated testing

RPA tools evolved from testing tools that mimic user interactions. While tests can be built into software, it is important to test from a user perspective. Such tests are time consuming when performed manually. However, they can be lightning fast when they are automated.

Common test scenarios are automated with RPA tools and these tests are run after every version, ensuring that new bugs are not introduced to the code. Obviously, more creative manual tests are required based on the specific feature developed in each new version. However, automated testing with RPA tools can facilitate testing and improve software quality. Since these tests tend to be simple, no code RPA solutions are ideal in such scenarios.

## Finance

### 24- Financial planning

Financial planning involves the unexciting exercise of processing and merging financial statements from numerous departments in a Financial Planning & Analysis (FP&A) system which can be at least partially automated.

### 25- Bank statement reconciliation



Extracting data from bank statements for reconciling records and comparing them against the company's own records was manually done via complex spreadsheets. However, this is a process that can relatively easily be automated. An important point to pay attention to is that rules based automation could break when company changes the banks it is working with. It is best to test initial outputs of the bots after your company changes its banking service providers.

## 26- Daily P&L preparation

Large financial services companies, especially those in the trading business, track P&L and risk exposures daily. While some companies have automated these processes, there are still companies that rely on excel, legacy tools and manual effort to complete these reports.

UiPath reports that they worked to automate daily P&L preparation for a financial services company. Resulting RPA installation reduced handling time from 60 minutes to 20 minutes, increasing accuracy of reports.

## HR

### 27- Candidate sourcing

Companies relying on legacy HR systems can use bots to automate aggregating CVs, assessment results and interview notes using bots. However, most modern HR systems take care of these functionality reducing the need for custom solutions

### 28- Employment history verification

This process includes numerous routine steps such as arranging interviews, maintaining records. UiPath provides a case study where they rolled out an automation program in 8 weeks, reducing 40% of the manual labor.

### 29- Hiring& onboarding & headcount reduction

Especially for growing or shrinking firms hiring and firing brings significant burden on HR and other support functions like IT, security, facilities management. While it is costly to build a solution that encompasses all these functions and completes the necessary tasks for new or leaving employees, RPA bots can be deployed relatively fast and effectively. Automating part of the process and measuring its progress on the RPA bot management module brings speed and transparency to the whole process.

An Argos Labs [case study](#) shows how adding new hires to the myriad of tools used by modern companies can be simply automated. A UiPath [case study](#) highlights how they reduced onboarding time from 30 minutes to 3 minutes with a scalable solution.

### 30- Payroll automation

Payroll function requires repetitive processing of payroll taking into myriad regulations and company rules. While modern payroll software provides a good solution for this process, some companies rely too much on legacy systems to be able to make the switch to a modern payroll software. They can rely on bots to increase automation in the payroll management process.

A [case study](#) from UiPath claims to have achieved 85% faster payroll processing with no manual errors. Implementation took 7 weeks and reduced manual effort to 25%.

### 31- Absence management

Your personnel will be notoriously bad at recording their absences and vacations. Personnel can be genuinely confused about or unaware of the absence management system. Second, they will not want to learn or remember how to use the system because once they do that, they will be required to fill in all their absences and no one wants that.

The problem is that while it is not ethical to hide someone's absences, it is also not a major crime like embezzlement. It is something that can easily be forgotten by the absentee, therefore easily forgiven.

Easiest solution: Let people decide their vacations as long as they get their work done. It's called [unlimited vacation policy](#) and could increase autonomy of your team while saving them a lot of bureaucratic hassle.

Slightly harder solution: Set up a simple RPA bot to cross check absentee reports against time logged in the corporate network and let your teams fill in the absences they had. You could also use another simple bot to simplify filling in absence information so your personnel does not forget to notify the system when they have an absence.

[A real life example is provided by UiPath](#). They rolled out automation for handling sick certificates in SAP in 3 months for a German HR services provider. RPA roll-out reduced manual effort to 5% of pre-automation levels and reduced processing time by 80%.

### 32- Worker's compensation claims

As Blue Prism explain in their [case study](#) about their work with Walgreens, workers' absence due to injury or sickness needs to be reported to the claims management service provider to manage worker's compensation claims. This is a relatively simple and automatable process.

### **33- Expense management**

Though there are sophisticated dedicated expense management solutions, most companies still use outdated systems that require employees to provide details on their expenses. Most of those details such as expense amount, date or location are already available in the receipts provided by employees.

An OCR capable RPA solution can extract important fields from receipts automatically, allowing employees to waste much less time with expenses. This can also save them from carrying around receipts as simply taking pictures of their receipts would be enough to extract the relevant data from receipts and fill important fields in the expense form.

### **34- HR virtual assistants**

Putting all of these services together for employees is also possible. A chatbot that authenticates customers and serves all their HR related needs would help HR departments to focus on higher value added activities. Such a bot could help employees register sick leave and vacation time, request information about their work contract and submit expense reimbursements.

LarcAI published a [YouTube demo](#) of such a HR virtual assistant.

## **Operations**

### **35- Updating inventory records**

Inventory management typically involves reconciliation across multiple systems as companies find it challenging to bring all inventory management features under one system. RPA bots can automate such inter-system reconciliation and communication with ease.

### **36- Issuing refunds**

Process of issuing refunds is far less optimized than more frequent processes at a company, leading to significant delays and customer dissatisfaction. This is a concern because customers requesting refunds are already dissatisfied customers and making them more dissatisfied can lead them to share their complaints with others, hurting your company's image.

UiPath worked with a credit reporting firm for 8 weeks to automate parts of their refund process, reducing manual work by 90%.

## 37- Compliance

Changing business, regulatory or tax requirement such as introduction of VAT in Dubai in 2018 require businesses to validate thousands of records. Landmark, a UiPath customer, leveraged RPA to process thousands of records.

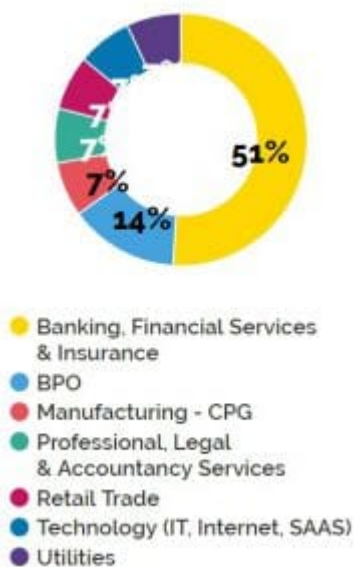
## Procurement

### 38- Updating vendor records

Vendor master file is important to keep up-to-date to ensure that different departments or units can coordinate their spending. Updating such files with bots can relieve procurement professionals from simple tasks to focus on managing vendor relationships.

## Industry specific processes

According to our experience and research, financial services including insurance and BPO seem to be the top users of RPA technologies



Source: SSON Analytics

## Financial Services

## Banking

WorkFusion provides numerous banking case studies:

### Banking Case Studies

	Consumer/Retail	Private/Institution	Enterprise Operations
<b>L1</b> Business	Lending/Mortgage	Capital Markets	Enterprise Supply Chain
<b>L2</b> Business	Loan Application Processing	Trade Execution	Invoice Processing
	<p><b>Process Background:</b> Title Documents are sent to loan analysts to be keyed into loan accounts, and sent to downstream process team for servicing via a workflow.</p> <p><b>Process Inputs/Outputs:</b> Unstructured Documents (Title documents in pdf format), Loan Servicing System</p> <p><b>Intelligent Automation Solution:</b> <b>RPA</b> Rules applied to initial front end process to provide lead in to analysts to train the robot to recognize actionable fields from the title documents; <b>Machine Learning Tasks</b> applied to the title documents to extract key data; <b>RPA</b> rules applied to accept and close out ticketing of title service request</p> <p><b>Business Benefit:</b> 55% Automation with RPA, 82% adding RPA + Exception Handling with 96% Quality; Decreased Title Serving time from 60+ minutes to 2 min per transaction (1000+ volume/mo)</p> <p><b>37 FTE savings @ \$33,000 fully loaded cost per FTE (\$1.22MM)</b></p>	<p><b>Process Background:</b> Brokers monitor FX Currency Thresholds of trades, and set limits for selling and buying of positions when the thresholds are breached.</p> <p><b>Process Inputs/Outputs:</b> Bloomberg Terminal Trade Servicing System Outlook Email</p> <p><b>Intelligent Automation Solution:</b> <b>RPA</b> rules applied to monitor threshold breaches and send alerts to brokers to be actioned (Phase 1) <b>Machine Learning Tasks</b> applied to take action on breaches and offload trade positions (Phase 2)</p> <p><b>Business Benefit:</b> 89% Automation with RPA on Phase I with 85% quality 78% Automation with RPA + Exceptional Handling on Phase II with 90% quality</p> <p><b>FX breakage exposure decreased from \$2mm per quarter to &lt;\$15,000; bot execution 10x faster than the Broker</b></p>	<p><b>Process Background:</b> Third party invoices are sent into the invoice processing queue to be validated by A/P team</p> <p><b>Process Inputs/Outputs:</b> Unstructured Documents (Invoice documents in pdf and tiff format) Procurement to Pay System Email and Work Flow Applications</p> <p><b>Intelligent Automation Solution:</b> <b>RPA</b> Rules applied to initial front end process to provide lead in to analysts to train the robot to recognize actionable fields from the invoice documents <b>Cognitive</b> applied to the invoice documents, which trained the robot to identify the necessary fields, and input into Procure to Pay system</p> <p><b>Business Benefit:</b> 60% Automation with RPA, 86% with Cognitive with 93% Quality; Decreased Invoice cycle time from 6-8 minutes to 30 seconds (3,000+ volume/mo)</p> <p><b>67 FTE savings @ \$60,500 fully loaded cost per FTE (\$4.05MM)</b></p>



Workfusion Automation Quick Start Guide

## 39- Know Your Customer (KYC)

While dedicated KYC solutions are emerging, if your company does not prefer to use one, it is possible to use RPA bots to automate portions of KYC process. For edge cases that require human intervention, case can be forwarded to an employee.

## 40- Loan processing

As with most document processing tasks, this process is also suitable for RPA automation as complex business logic can be embedded in bots partially automating loan decisions and the manual processes that follow the decision

## 41- Trade execution

In cases where legacy systems are not capable of storing complex limit orders, RPA bots could help. However, this is more of a band-aid case as in the long run, moving to a sophisticated and capable trading system would probably be a good investment given how it could improve trading

and reduce the load of traders. To be honest, even in 2000s I was surprised that humans were still keying in trades and engaging in day trading in banks. Given the richness of data and speed of machines, it is very surprising that humans are still working on this in 2018.

## **Other operational banking processes were highlighted as RPA case studies by The co-Operative Bank in the UK and Blue Prism**

**42- Same day funds transfers:** The co-Operative Bank needs to complete payments using The Clearing House Automated Payment System (CHAPS) which offers same-day funds transfers. The manual process which took 10 minutes per request was automated and reduced to a few seconds of turn around time per request. Process steps include checking for fund availability, performing the transfer to the point where manual authorisation is required without error, charging the customer and notifying the account.

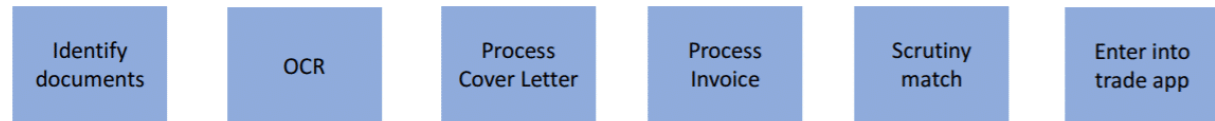
**43- Account Closure:** For The co-Operative Bank, account closure was lengthy and time consuming. It required the manual cancellation of direct debits and standing orders, transfer of interest charges and the transfer of funds from one account to another etc. Now the system is automated with RPA so customer service agents can complete an electronic form over the phone which is sent to a central mailbox where it is processed by the RPA system with no manual intervention.

**44- Validating and processing online loan applications:** Blue Prism was used to build intermediary bots between the online system and the main frame that used business logic to ask the user to fix incorrect entries, make the loan decisions and generate confirmation letters

**45- Audits:** Banks need to reply to requests by the auditors for company audit reports. Bots have been used to find all the customer's accounts year end balances and returns the audit to the audit clerk in the form of a Word document. This can reduce an average audit which can take several hours to complete and a large audit that can take several days into an operation that can be completed in minutes

## **46- Logistics – Trade Finance**

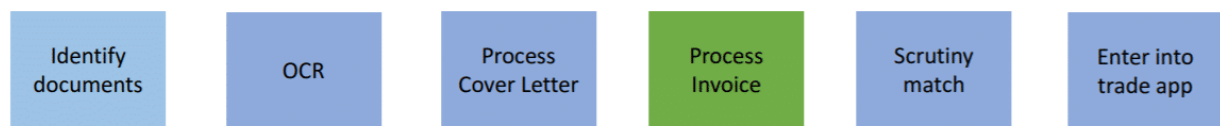
# Let's look under the hood of Trade Finance automation



**Starting point:** 500 documents / day  
12 minutes for maker  
6 minutes for checker

Source: WorkFusion Combining RPA + AI Webinar

Trade finance involves multiple parties coordinating and insuring the delivery of goods and payments. Banks and companies communicate through letters of credit and other documents which need to be processed. WorkFusion provides an example where they mostly automated a trade finance application without writing an extensive rule set, relying on workers of the process to train the cognitive automation tool.



WorkFusion  
digitizes and  
pre-processes  
Invoice

**Extract Invoice Data**

Click to show/hide instructions

Original PDF

Extract data from invoice

Multiple invoices: ☐ Yes

Invoice number: 100000 Invoice date: 10/10/2018 Customer no.: 1000-1000

Bill to: Ship to: WorkFusion Inc. WorkFusion Inc.  
48 Wall Street New York 48 Wall Street New York  
NY 10007 NY 10007  
Phone number: +1 201-699-7777 Phone number: +1 201-699-7777

Model No.	Description	Quantity/Amount
010201010	3rd-Advanced	2000.00
010201010	Chemicals	544.00
010201010	Chemicals	544.00

Please Wire Transfer money to following account

Name of beneficiary bank: Bank of Finland  
Address of beneficiary: 11 Ruskokatu, Helsinki  
number: 0000000000 SWIFT Code: BOFIHEL310  
Name of the bank: Bank of Finland Address of the bank: Helsinki branch Bank account number: 0000000000 SWIFT Code: BOFIHEL310

Summary:

- Total Amount: 2544.00
- Currency: EUR
- Invoice Number: 100000
- Invoice Date: 10/10/2018
- Beneficiary Bank Name: Bank of Finland
- SWIFT code: BOFIHEL310
- Beneficiary Account Number: 0000000000
- Bank: Bank of Finland

Submit

Person tags  
data  
thereby  
generating  
training set

Source: WorkFusion Combining RPA + AI Webinar

## Insurance

### 47- Claims processing

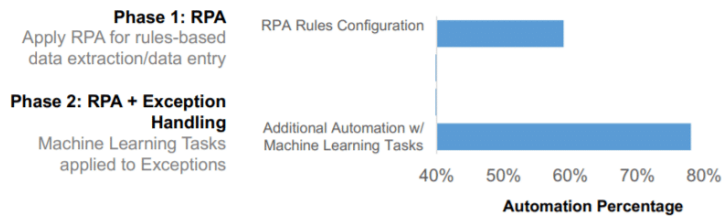
## Insurance Claims: Claim Sanctions Processing Case Study

Global sanctions process involves name matching for individuals, organization, or vessel names to identify potential match or false positive for Sanctions

### Overview of the Process

**Highly Manual:** Each sanction search is highly manual and repetitive with heavy copy and pasting from one system to another for Level 1 clearance  
**Highly structured:** System to system data extraction and input with like for like fields  
**Time-Consuming:** Each record takes approximately 6-10 minutes to complete Level 1 clearance  
**Time-sensitive:** Same Day Processing

### Smart Process Automation Solution



### Business Value Outcome

Average of 60% Automation with RPA, 79% Automation with Machine Learning tasks added; 97% Quality, Decreased cycle time from 6-10 minutes to 90 seconds  
 Replicable process and configuration for processes accessing similar source system

**14 FTE savings @ \$71,600 fully loaded cost per FTE (\$1MM)**



WorkFusion Automation Quickstart Guide

Claims processing is at the heart of every insurance company. Since customers make claims at a time of misfortune for them, customer experience and speed are critical in claims processing. There are numerous factors that create issues during claims processing such as

- **Manual/inconsistent processing:** Claims processing often involves manual analyses completed by outsourced personnel.
- **Input data of varying formats:** Customers send in data with various formats
- **Changing regulation:** No insurance company has the luxury of not accommodating to changes in regulation in a timely manner. This requires constant staff training and process update.

These lead to human biases in claims processing which can lead to losses, customer dissatisfaction and lack of visibility in a crucial process.

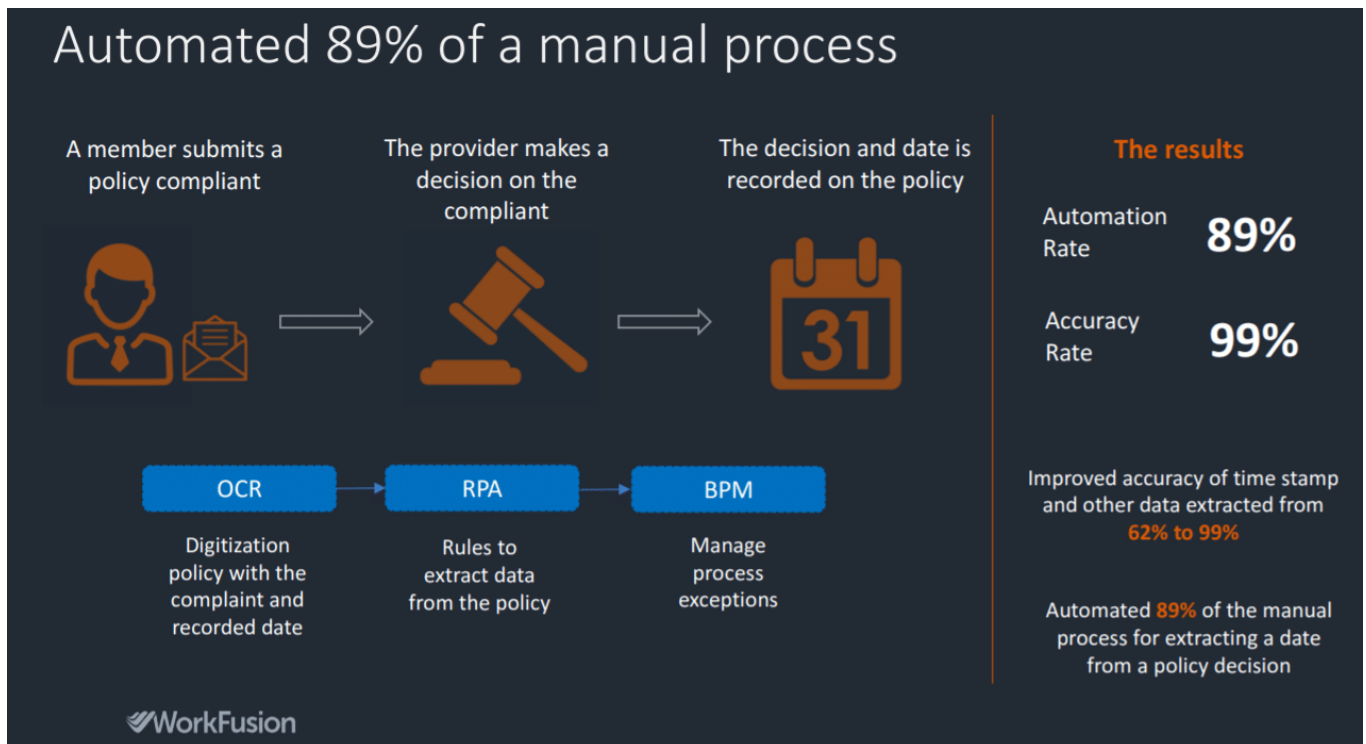
RPA bots can deal with all these issues. Essentially, bots take in unstructured data in forms, extract structured data and process claims based on pre-defined rules. This approach takes care of all major issues with manual claims processing:

- Claim verification can be automated with rules
- Bots can deal with various data formats to extract relevant data
- Rules can be changed with regulatory changes, without any need for training, immediately ensuring compliance.



## 48- Appeals processing

After claims are processed, some claims results in appeals which is another process that can benefit from automation. Workfusion claims that they automated 89% of appeals processing with a 99% accuracy rate.



Source: WorkFusion Combining RPA + AI Webinar

## 49- Responding to partner queries

Numerous industries such as telecom or insurance rely on independent brokers to sell their products and services. It is crucial to serve these partners in a timely manner to maximize their sales. South African insurance company, Hollard mostly automated responses to partner queries by building bots that interpreted incoming email and resolved simple inquiries while passing complex ones to humans.

[LarcAI details its implementation](#) at Hollard where they achieved 98% automation and reduced cost per transaction by 91%. LarcAI partnered with UiPath in this implementation and UiPath team details their achievements on this case [here](#).

## Telecom

Numerous telecom back-office processes have been automated. Examples include:

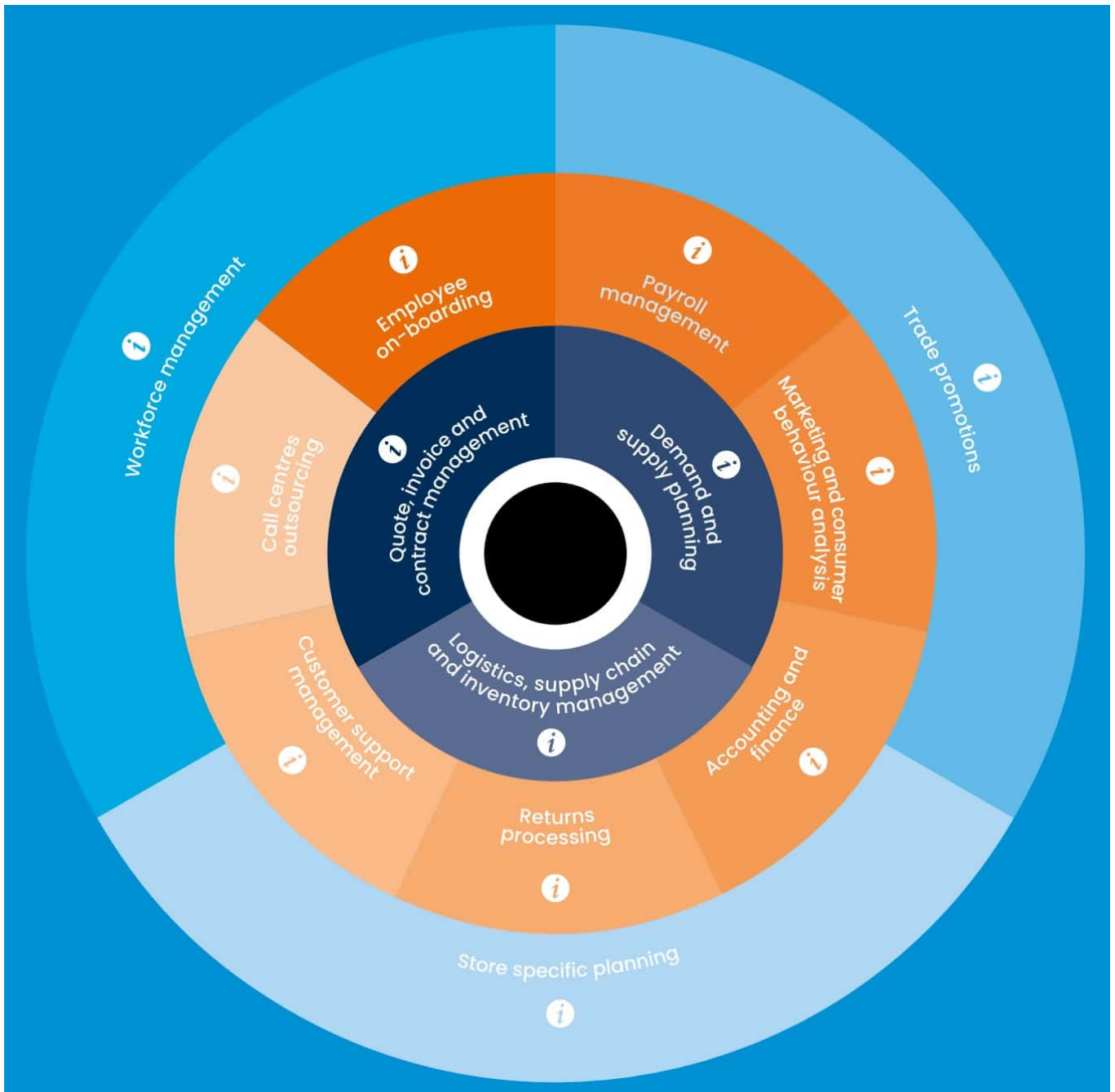
- **50- Credit checks:** Required for post-paid accounts and typically involves manual processes

- **51- SIM swapping:** Assigning a new SIM to a user. Could be due to a change of SIM format or a case of lost/stolen SIM
- **52- Customer dispute resolution:** Automatically classifying disputes, resolving ones that can be automatically resolved and assigning the more complex ones to related parties is a relatively simple yet effective back-office process to automate
- **53 – Porting customer numbers:** Customers switching to other operators need to get their numbers ported which can be fully automated.

## Retail

Retail includes labor intensive and constant operational and analytics activities like launching new promotions. RPA bots can help retail companies without state of the art systems to bridge the gaps in their systems and automate their process.

A comprehensive list of RPA application areas identified by UiPath in retail are listed below. However, please note that these include processes that are common to many industries. In the list below, we only highlighted retail specific processes.



Source: UiPath

## 54- Product categorization

Global retail companies need to harmonize SKU data from multiple markets to be able to look beyond numbers to insights like “What is our toothpaste market share in Eastern Europe?”.

Traditionally these tasks required employees to manually match SKUs to categories in complex spreadsheets. Since this is a task that does not directly impact customers, fault tolerance is not very high and RPA bots can be used to automate the process saving thousands of hours of work. [Everest Group’s report](#) provides details on a specific example.

## 55- Automated returns

Automating returns can both improve customer satisfaction and reduce manual labor. RPA bots can be used to automate manual aspects of the returns process such as checking customer purchase record from the system.

## 56- Trade promotions

Shop floor trade promotions require a significant amount of backend admin work. Key tasks include

- creating and allocating funds for promotions
- generating reports that give visibility of promotion performance

RPA bots can automate these tasks as they are mostly mundane back-office tasks. Bots can make it easier and faster for retailers to launch trade promotions.

## 57- Inventory/supply chain management

Some retailers rely on legacy systems for stock keeping. RPA bots can perform constant checks on these systems providing data on key metrics like items with low stock levels or rapidly changing stock levels.

# RPA applications for personal use

WorkFusion [posted a few ingenious RPA demos](#) built with RPA Express. These can give you ideas on how RPA can power your business processes. Some of the applications are:

- 58- [Transferring business cards to Salesforce](#)
- 59- [Pulling data from multiple websites to identify best deals on auction websites](#)
- 60- [Daily briefings based on calendar and assigned tasks](#)

Other hackathons resulted in interesting projects:

- 61- [Automated receptionist for welcoming visitors to enterprise campuses](#), built for P&G hackathon

## For more on RPA

To read specific case studies about these RPA application areas, visit our [growing list of RPA case studies](#).

As the number of RPA use cases may demonstrate, RPA is used across a wide variety of areas. Our articles on [RPA marketplaces](#) and [reusable RPA plugins/bots](#) explain how reusable code reduces development time in RPA implementation.

To learn more about RPA, you can read:

- [Our complete guide on RPA](#)
- [Benefits you can reap from RPA](#)
- [Our guide on RPA innovations that you can work with today such as no code RPA](#)

If you are ready to start automating with RPA, feel free to use

- [the best guide on selecting the right RPA software](#)
- [the most up-to-date and comprehensive list of RPA products](#)
- Once you choose the RPA software you will work with, we have an [in-depth guide for selecting an RPA implementation partner and the comprehensive list of all RPA implementation partners](#).

If you need more help on using RPA to transform your business:

[Download our In-depth Whitepaper on RPA](#)

And If you need help in identifying solution providers in RPA or another category:

[Let us find the right vendor for your business](#)

We relied on a few reports as well as our experience while compiling this list. These reports were helpful:

[Thoughtonomy's 6 real world RPA use cases](#).

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# Top RPA platforms for



## 11 COMMENTS



**Ummul kadri**

JANUARY 29, 2019 AT 10:05 AM

Very well explained but how so some onde do data validation usgin rpa?

### REPLY



**AIMultiple**

JANUARY 30, 2019 AT 10:51 PM

While relatively simple checks like data type checks would be automatically performed in databases, more complex validation that includes business rules can be programmed using RPA. For example a customer's usage may be restricted in complex ways by user's subscription. This restriction can be programmed in a simple RPA bot that regularly validates data and highlights anomalies

### REPLY



**{hợp tuổi gì**

FEBRUARY 3, 2019 AT 1:08 AM

Your style is really unique compared to other folks I have read stuff from. Thank you for posting when you have the opportunity, Guess I will just bookmark this page.

### REPLY



**Trinath Singh**

FEBRUARY 5, 2019 AT 8:22 AM

Hi,

Thanks for the valuable information in detailed manner.

Can you please let me know if we would be able to use RPA for SQL server jobs automation process.

We are using SSIS and in order to load the data in daily basis there are few jobs running now as part of another automation tool.

Thanks in advance

**REPLY**



**AIMultiple** 

FEBRUARY 5, 2019 AT 8:13 PM

Hi Trinath,

Most RPA tools should be able to automate SQL jobs. For example, visualcron provided a short **tutorial** on this

**REPLY**



**Jessica Munday**

MARCH 20, 2019 AT 12:34 AM

Hello,

We love this piece. My company is wondering if we could connect to share some of our use cases as well.

Thanks so much,  
Jessica

**REPLY**



**AIMultiple** 

MARCH 27, 2019 AT 1:13 PM

Hi Jessica,

Sure, would love to collaborate. Reaching out to you from my [aimultiple.com](mailto:aimultiple.com) email.

**REPLY**



**Roadster 59**

MARCH 22, 2019 AT 11:00 AM

Infredibly well written blog! I've learned many ideas, many thanks for blogging.

Have you got a subscriber list I'm able to register for?

**REPLY****Infrd**

APRIL 17, 2019 AT 9:07 AM

Infrd AI(<https://infrd.ai/>) takes out the pain of capturing data and extracting intelligence from a plethora of documents, delivering you the information you need without having to manually go over documents one by one. The software basically saves you precious time and effort and you never have to worry about accuracy as Infrd AI uses the latest OCR technologies and their own AI algorithms to ensure the precision of every extracted data.

**REPLY****Rutu Goklani**

MAY 8, 2019 AT 9:21 AM

Hello, Well written article and elaborately explained. We'd love to share our experiences and case studies to collaborate further.. Would that be possible?

**REPLY****Mark**

JULY 6, 2019 AT 5:26 AM

Dear AI Multiple Author, Thank you for providing us readers with an educative article on the uses and application of RPA. Your versatility and subjective command is extraordinary even since your earlier article on Robotic Process Automation. It is a must read for every company looking to convert to RPA as this article provides a complete and elaborate guide on both Industry and Department wise.

**REPLY**

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## DECISION MAKING

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### IOT

Analytics

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## PROCESS MINING

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## PROCESS AUTOMATION

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## SURVEY&REVIEW ANALYTICS

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## SELF CHECKOUT SYSTEM

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## MARKETING

Dynamic pricing  
Recommendation system  
Website personalization  
Content Automation  
Voice recognition  
Marketing analytics

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## SALES

Predictive sales  
Lead Generation  
Sales analytics

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## CUSTOMER SERVICE

Intelligent call routing

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## OPERATIONS

OCR  
Invoice automation  
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