Beyond Native Automation: How RPA Supercharges Salesforce

Integrating Robotic Process Automation (RPA) with Salesforce creates a transformative paradigm in enterprise automation, addressing the fundamental challenge of connecting systems across organizational boundaries. This presentation examines how RPA extends native Salesforce capabilities by bridging gaps between connected and disconnected systems, enabling organizations to maintain Salesforce as their central orchestration hub while achieving comprehensive digital transformation.

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Agenda

The Integration Challenge in Modern Enterprises

In today's interconnected business landscape, organizations rely on a complex web of applications, systems, and platforms to manage their operations.

Most enterprises now prioritize integration between their core business platforms, with CRM systems serving as the central hub for customer data in digital transformation initiatives.

Salesforce has established itself as the gold standard for customer relationship management and workflow automation, commanding a significant market share in the global CRM sector.

Despite Salesforce's powerful capabilities, organizations report significant challenges in

The Enterprise Integration Gap

- Modern APIs
- Middleware & Connectors
- External Portals
- File-Based Processes
- Legacy Systems
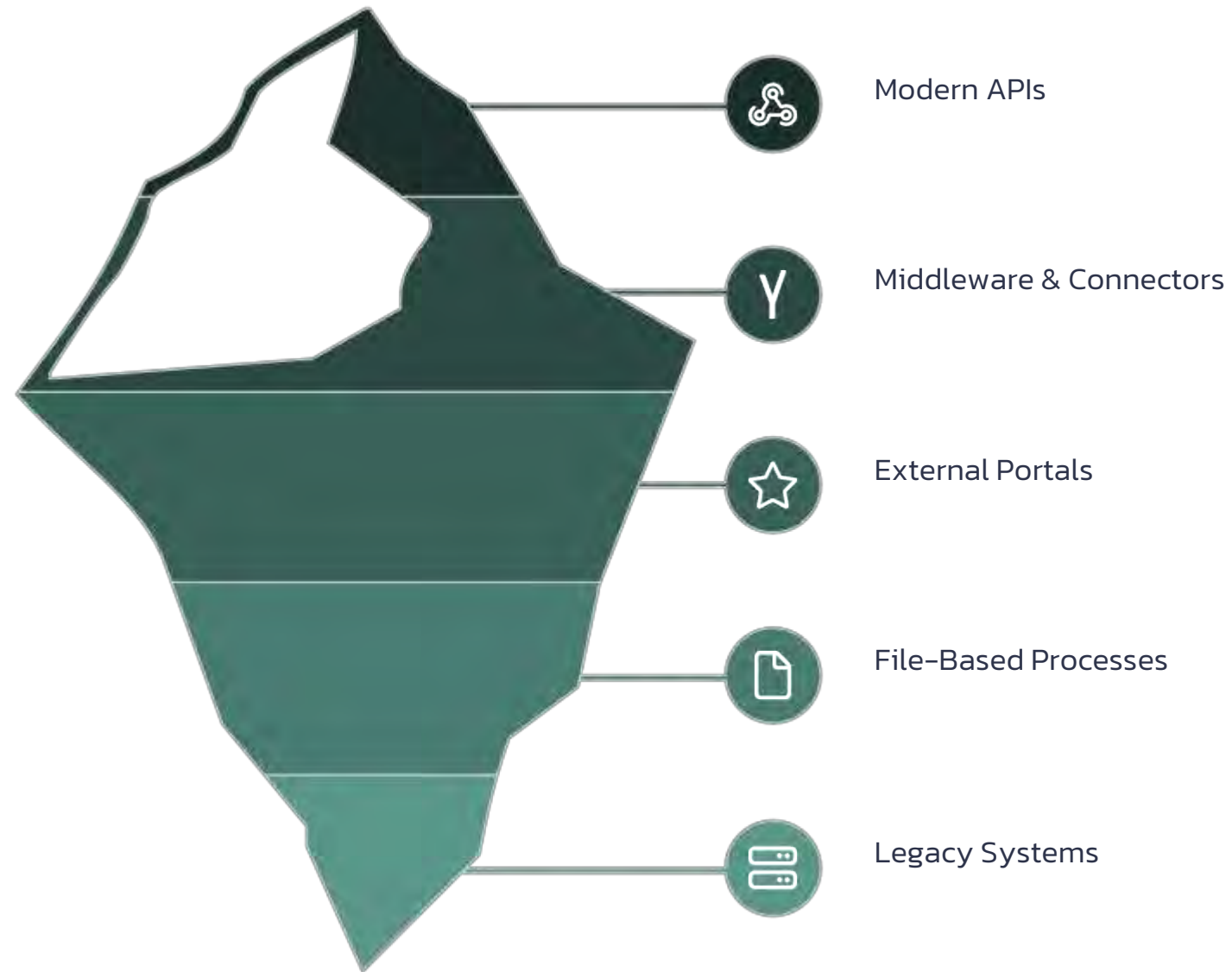
Organizations implementing RPA alongside Salesforce report substantial reductions in manual processing time per employee per week, equivalent to significant increases in workforce productivity.
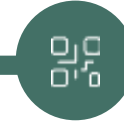
Native Salesforce Automation Tools
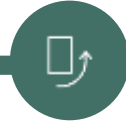
Flows

Visual workflow builders that enable declarative automation within Salesforce, allowing administrators to create complex business logic without code.

Enterprise-grade deployments achieve impressive processing throughput measured in hundreds of transactions per second.

Apex

Salesforce's proprietary programming language provides developers with the ability to create custom functionality and complex integrations.

Supports the vast majority of business use cases when properly architected.

Web services

•Apex REST/SOAP API: Allows exposing Apex classes and methods to external applications.

•Bulk API: Designed for handling large volumes of data operations asynchronously, such as creating, reading, updating, or deleting records. It's used for processing over 2,000 records and can handle high data throughput.
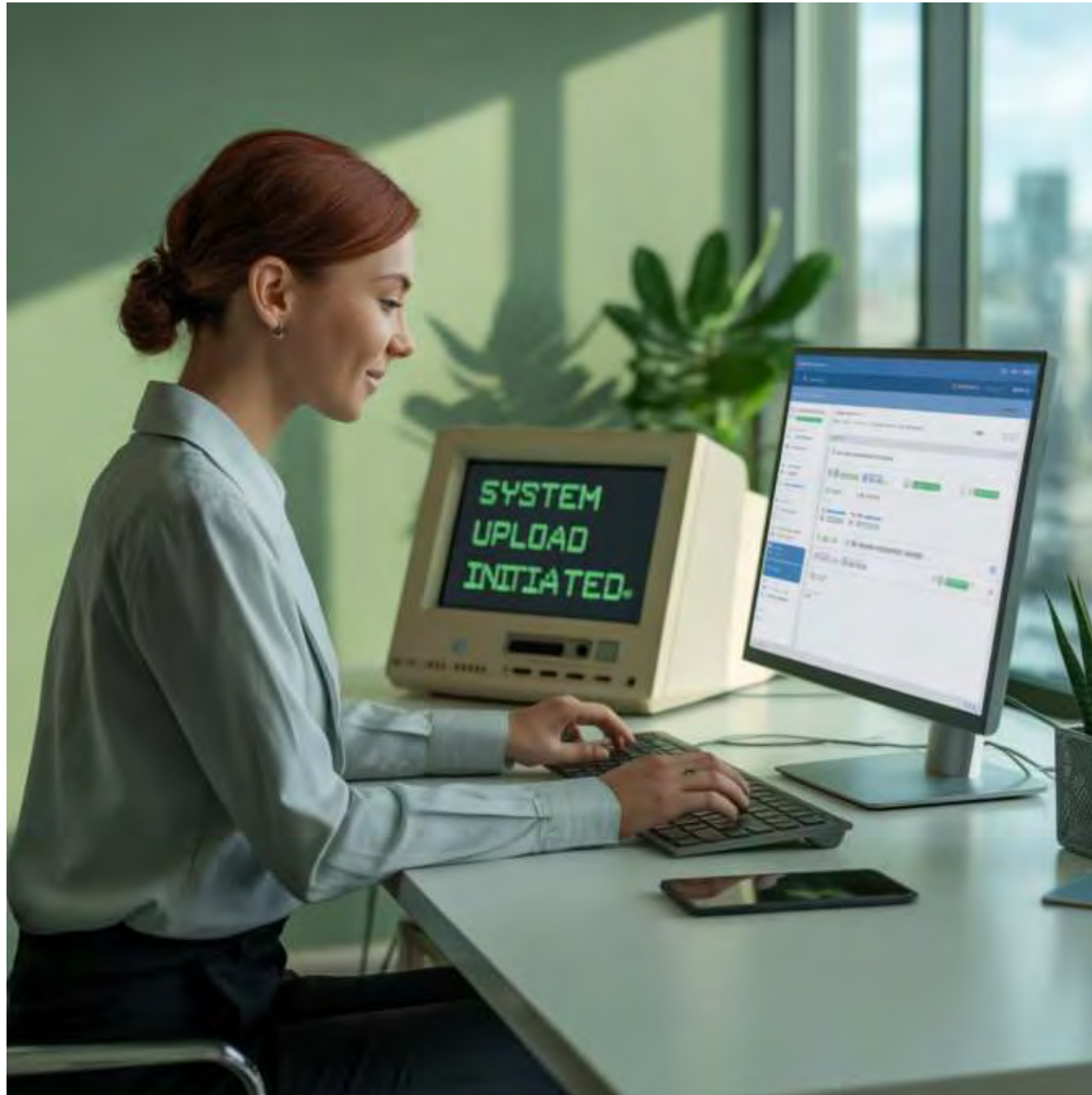
Platform Events

Event-driven architecture that enables real-time integration between Salesforce and external systems.

Where Native Tools Fall Short

Legacy System Integration

Most enterprises maintain legacy systems without modern API interfaces, requiring manual data entry through terminal emulators or proprietary interfaces.

File-Based Processes

Organizations frequently deal with Excel spreadsheets, CSV files, PDFs, and other document formats that require manual processing.

External Web Portals

Employees spend several hours per week manually transferring data between web applications and their CRM systems.

Cross-System Orchestration

When business processes span multiple systems with varying integration capabilities, native tools alone cannot provide end-to-end automation.

RPA: The Bridge Between Salesforce and the Enterprise

Robotic Process Automation represents a paradigm shift in how we approach enterprise integration. Unlike traditional integration methods that rely on APIs and direct system connections, RPA operates at the user interface level, mimicking human interactions with applications.

Performance assessments show that RPA bots achieve exceptional accuracy in interface interactions compared to human operators, while dramatically reducing processing time.

How RPA Complements Salesforce

Navigate Any Interface

RPA bots can interact with web browsers, desktop applications, terminal emulators, and even Citrix environments, just as a human user would.

Substantially reduces integration development effort compared to traditional API development.

Process Unstructured Data

When combined with AI capabilities like OCR and natural language processing, RPA can extract information from documents, emails, and images with high accuracy for standard business documents.

Maintain Audit Trails

Every action performed by an RPA bot is logged, providing complete visibility into automated processes for compliance and troubleshooting.

Significantly improves incident detection rates.

Scale on Demand

Unlike human workers, RPA bots can be scaled up or down instantly based on workload requirements.

Handles substantially more complex workflows with the same administrative overhead.

Real–World Integration Scenario: Order Processing

New Order in Salesforce

RPA bot monitors Salesforce for new orders

SAP Login

Bot automatically logs into the SAP GUI

Data Entry

Navigates to appropriate screens and enters order details

Update Salesforce

Captures confirmation numbers and updates Salesforce

Exception Handling

Any exceptions are flagged for human review

This automation achieves substantial annual savings, with the vast majority of orders being processed without any manual intervention.

Analysis of order processing workflows found that RPA-enhanced automation dramatically reduces order cycle time while decreasing error rates to minimal levels.

Real–World Integration Scenario: Invoice Processing

The Challenge:

Invoices arrive as PDFs, emails, and physical documents. Manual processing takes days and is error-prone.

The RPA Solution:

- OCR technology extracts data from scanned invoices
- RPA bots validate extracted data against purchase orders in Salesforce
- Approved invoices are automatically entered into the accounting system
- Discrepancies are routed to appropriate teams through Salesforce cases

Average handling time reduces from many minutes to just a couple of minutes per document.

Real–World Integration Scenario: Compliance Data Collection

Manual Process

Staff members visit dozens of websites, search for providers, and copy credential information.

Time-consuming, error-prone, and costly.
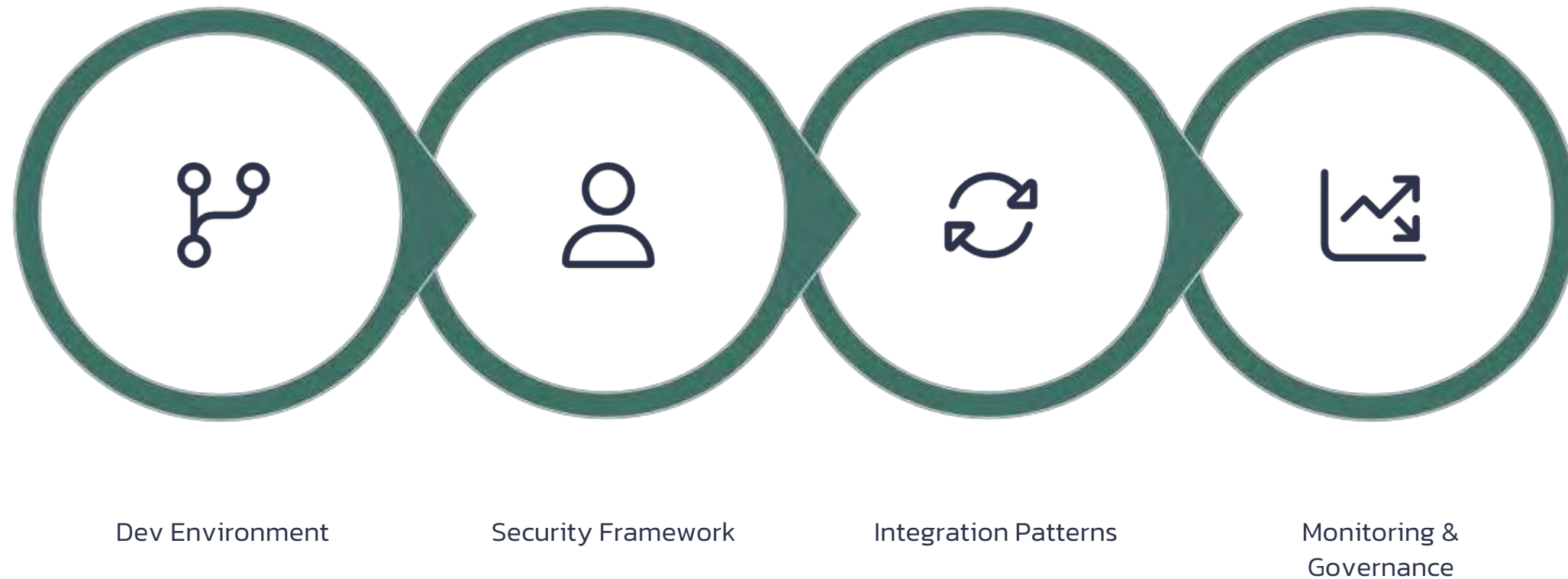
Automated Solution

- RPA bots access state licensing websites on a scheduled basis

- They search for providers listed in Salesforce

- License status, expiration dates, and other details are captured

- Salesforce records are automatically updated

Results

Organizations report dramatically lower audit preparation costs and substantial reductions in compliance-related penalties.

Significant annual savings for mid-sized institutions.

Technical Architecture of RPA–Salesforce Integration

Dev Environment

Security Framework

Integration Patterns

Monitoring & Governance

Organizations implementing tightly integrated API-first approaches achieve significantly higher data throughput and lower latency compared to those using traditional middleware solutions.
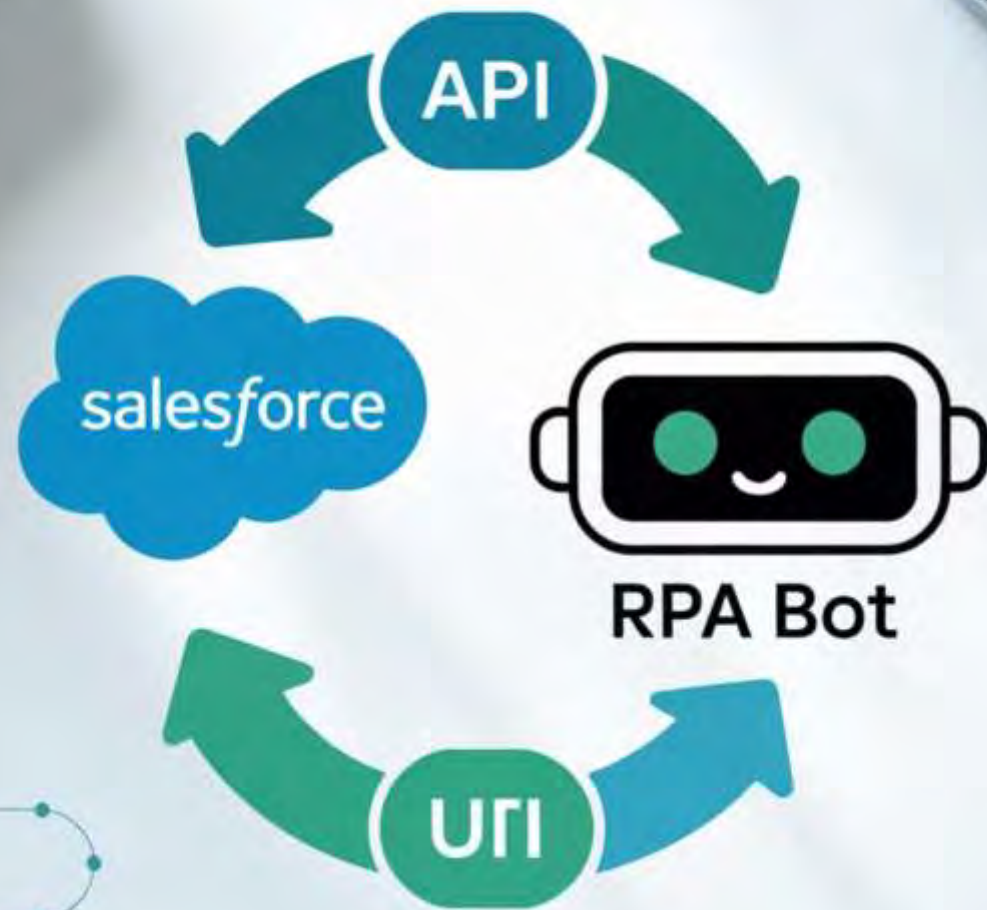
Integration Patterns

Bot–Initiated Actions

RPA bots can trigger Salesforce workflows through:

- REST API calls achieving significant latency reductions
- Direct UI interaction with Salesforce screens
- Platform Events to initiate real-time processes with near-perfect data consistency

Salesforce–Initiated Automation

Salesforce can orchestrate RPA bots via:

- Outbound messages to RPA orchestration platforms
- Platform Events consumed by RPA listeners
- Custom Apex callouts supporting much higher straight-through processing rates

Benefits of Native RPA Integration in Salesforce

1

Single Vendor

Reduces procurement and contract management costs substantially, with administrative overhead decreasing proportionally.

2

Consistent UX

Integration-related incidents decrease significantly when automation tools operate within a consistent architectural framework.

3

Integrated Governance

Organizations report much less time spent on security administration and audit preparation.

4

Simplified Licensing

Consolidated training programs reduce technical education costs considerably.

Implementation Best Practices

Start with Process Discovery

- Document current manual processes identifying the many legacy systems without modern APIs

- Calculate potential ROI using proven metrics showing exceptional returns for legacy system integration

- Prioritize based on the extensive process coverage achievable with RPA-Salesforce integration

Design for Resilience

- Implement error handling achieving highly successful exception management

- Design fallback mechanisms for system unavailability

- Create notification systems with rapid mean time to detection

- Plan for regular maintenance windows

Maintain Human Oversight

- Establish exception handling workflows with high first-time resolution rates

- Create dashboards for monitoring bot performance

- Implement approval processes achieving much higher employee satisfaction

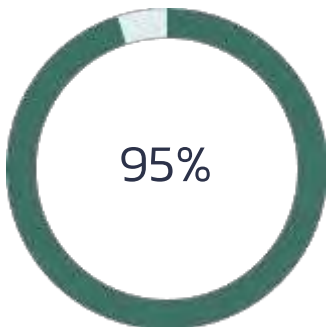- Maintain skilled teams with much lower process abandonment rates

Measuring Success: KPIs and Metrics

Quantitative Metrics

80%
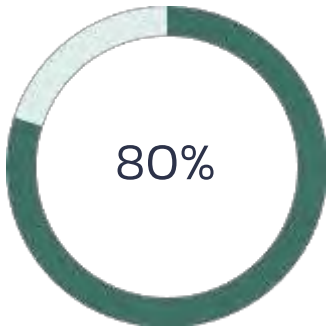
Processing Time Reduction

Dramatic average reduction in processing time

95%

Error Rate Improvement

From moderate error rates to minimal levels in automated processes

3x

Volume Handled

Multiple times more complex workflows with same resources

Qualitative Benefits

- **Employee Satisfaction:** Significant increase as measured by engagement surveys
- **Customer Experience:** Substantial reduction in delivery timeframes
- **Compliance Adherence:** Major reduction in compliance-related penalties
- **Scalability:** Multiple-fold improvement in high-volume transaction scenarios

Industry–Specific Applications and ROI

Healthcare

- Much lower audit preparation costs through automated credentialing
- Exceptional improvement in legacy system integration scenarios
- Significant annual savings for mid-sized institutions

Manufacturing

- Dramatic reduction in order cycle time
- Substantial increase in customer satisfaction scores
- Notable increase in repeat business through improved delivery times

Financial Services

- Major improvement in document-processing workflows
- Significant cost reduction per document processed
- Near-perfect accuracy maintained for standard business documents

Future Outlook: The Evolution of Enterprise Automation

As we look ahead, the convergence of RPA, AI, and CRM platforms like Salesforce promises even greater possibilities. Organizations adopting unified RPA-Salesforce architectures complete digital transformation initiatives much faster while requiring significantly fewer technical resources.

Intelligent Process Automation

- Cognitive decision-making with substantial improvement in decision quality

- Natural language processing achieving near-perfect data consistency

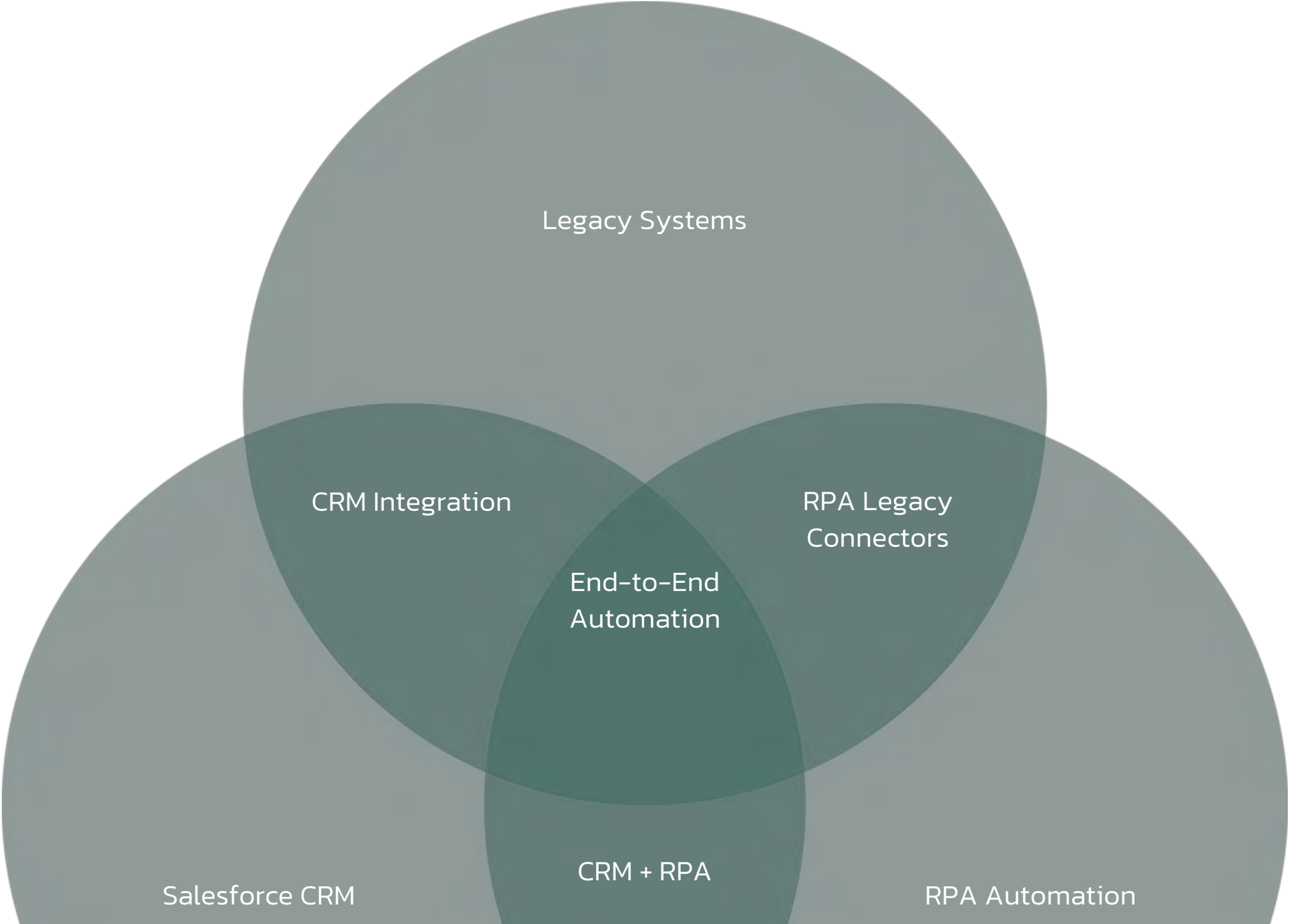- Predictive analytics reducing mean time to detection to mere hours

Hyperautomation

- End-to-end process orchestration handling millions of daily transactions

- Digital twins achieving near real-time data consistency

- Continuous optimization based on performance metrics

Embracing the Automation Imperative

Key Takeaways

1   **RPA bridges the gap between Salesforce and legacy systems**

Enabling true end-to-end process automation that spans the entire enterprise ecosystem without replacing existing infrastructure.

2   **Measurable benefits across industries**

From substantial workforce productivity gains to exceptional returns on investment, the business case is compelling.

3   **Human potential is enhanced, not replaced**

With employees saving many hours weekly and satisfaction scores increasing dramatically, the human impact is as significant as the operational benefits.

4   **The future is now**

The question is not whether to embrace this technology but how quickly we can implement it to stay ahead of the curve.

Thank You