

# Advanced Process Automation: Setting New Standards of Service in Front & Back Office Operations



## INTRODUCTION

With service-level expectations rising more quickly than budgets, back-office employees are just as critical a component in building and sustaining profitable customer relationships as their counterparts in the sales and service departments.

Every point of contact, whether it be direct or indirect – a bill, a call to

the contact center, an online interface or a step in the claims process – has the potential to make a customer feel more or less engaged with the company. Each point of contact is an opportunity to meet rising customer expectations, grow the business by upselling a product or service, or, conversely, to make an error or lose a customer.



# > INTRODUCTION

Your contact center and back-office employees aren't always focused on the customer, though. In fact, the average employee spends up to 80 percent of his or her day on mundane, routine work. These are tasks that take up a lot of time but don't require much creative thinking. In IT, they might take the form of a team member entering new-hire information into five separate systems; in HR, a recruiting manager might need to create offer letters following a highly structured, routine process. Although these tasks may require accuracy and speed, they are straightforward in nature.

A growing number of companies are redefining how work gets done by automating these mundane processes. With robotic automation, employees gain a virtual teammate that allows them to focus on more strategic, engaging activities. Half of today's organizations say they are planning to implement robotic automation, and more than one-quarter have already done so.

The outcome is nothing short of transformative. NICE Robotic Automation is allowing organizations to reinvent customer service in the back office and the contact center. Automation offers an immediate reduction of administrative costs for a quick return on your investment. With robots able to perform tasks four to five times faster than a human, NICE Robotic Automation enables quicker turnaround

times for customer requests and improved service-level agreements (SLAs). Routine processes are completed flawlessly every time, reducing the need to allocate time for making corrections. NICE Robotic Automation is highly scalable, so a center's processing power can increase when demand does.

The robots provide a central control system to monitor and manage task queues and process execution and can automate any routine desktop activity, such as launching an application or copying and pasting information. The solution integrates with third-party systems, including CRM, billing and any other application which exists in the environment, to automate cross-application activities. NICE robots replicate human action by interacting with the desktop applications and processing transactions in the same way the human employee would. Not all processes can be handled under the same considerations for automation. Organizations can choose their desired level of automation - full or partial automation. For routine processes, robots can perform them without any human intervention. For more complex procedures, employees and robots can share the responsibility, with the employee performing the tasks that require more extensive thought and action, and the robot performing the more structured tasks.

## ROBOTIC AUTOMATION OFFERS TRANSFORMATIVE RESULTS



Reduced costs



Improved productivity



Increased accuracy



Better resource utilization



Rapid ROI

The large-scale automation of processes has become a reality for organizations across industries, from banking, government and retail to telco, utilities and transportation. To remain competitive, today's business cannot afford to miss the opportunity to transform its own back-office processes.

Keep reading to learn how organizations are using the NICE Robotic Automation solution to optimize resources, cut costs, and increase speed and accuracy.

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## INDUSTRY SPOTLIGHT: BANKING

### CHALLENGE

One of Italy's major financial services groups had established its own contact center company to provide business process outsourcing for financial and insurance organizations. Guided by a customer-oriented business philosophy, it had built a reputation for exceptional personal customer service. Operations, however, were flagging as the contact centers reached capacity: 500 agents were handling roughly 650,000 calls per month and were under immense pressure to meet SLAs that required agents to take action within five minutes of receiving a fraud alert for a suspicious credit card transaction. In practice, agents

were spending a lot of time on data entry and follow-up activities after a customer interaction ended, and the centers needed a new model to reduce the repetitive and low-value tasks interfering with the core activities of its agents – all without sacrificing accuracy or undermining customer relationships.

## SOLUTION

The banking organization turned to NICE to evaluate its call-handling processes and determine which contact center tasks could be accomplished by a robot – those routine, critical jobs that require accurate, fast and single-minded handling. After its initial analysis, the organization implemented NICE Robotic Automation, paired with desktop automation. The solution guided agents with pop-ups on their screens during fraud investigations and interactions with credit card holders, reducing handling times and processing errors. Robots then completed the time-consuming wrap-up phase, including documenting the case and its outcome, freeing agents to focus on more value-added tasks and to begin the next interaction immediately after concluding a previous one.

The solution allowed the contact center robots to execute a series of data entry actions, including ticket and database entry log and the filing of claims requests. In doing so, it allowed the agents to focus more of their time and efforts on fraud case investigation activities, such as decision-making and customer service.

## RESULTS

The financial services group was able to drive quality, predictability and speed, and its contact centers realized significant results across a range of key performance indicators. The company now handles more than 8,000 alerts each month with greater than 99 percent accuracy in preventing fraudulent activity.

The NICE Robotic Automation solution also reduced average handing time of the wrap-up phase by 82%, allowing the contact centers to meet process SLAs 100% of the time.

Employee satisfaction levels skyrocketed, with agents able to spend more time performing meaningful work reporting that they felt that their efforts were valued more. As the organization continues to embrace robotic automation, the financial services group's leadership envisions a future in which contact center representatives are able to focus solely on the customer.



## INDUSTRY SPOTLIGHT: GOVERNMENT

Public Agency Enables  
Faster Data Collection and  
Reduced Agent Error

### CHALLENGE

A public sector organization responsible for collecting taxes and providing support services was looking to deliver more for less through more efficient operations and streamlined service. The organization used a third-party vendor to call customers to validate personal information, recommend updates and rule out errors and fraud, which totaled \$2.7 billion. The vendor, however, was unable to access the government agency's internal records to update the system due to access restrictions policy, and making the changes identified by the vendor would require the hiring of 600 employees.

The agency also responded to a high volume of requests for financial information, with significant peaks in work that necessitated a ramp up of advisors from 2,000 to 4,000 seasonally. This type of request required advisors to pass through 20 different screens, often leaving customers on hold for extended periods of time. Advisors frequently missed key information, leading to errors, and customers often called back to get a better answer, or one they trusted more. The agency needed a solution that would shorten call time and first-call resolution by ensuring that the information customers received was thorough and reliable.

## SOLUTION

The agency turned to NICE, which implemented NICE Robotic Automation. The solution used 150 robots to process 25,000 updates identified by the third-party vendor each day. The robots were scalable and able to take on new tasks in order to handle other types of work in the future.

The NICE solution also automated the agency's response to requests for financial information by gathering and analyzing customer data. The advisor was then guided via on-screen prompts that showed how to best handle the situation. These prompts helped the representatives preempt customer questions and reduce repeat calls.

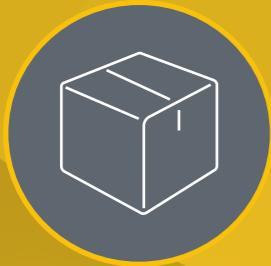
## RESULTS

NICE Robotic Automation delivered immediate savings and allowed the agency to work more quickly and efficiently.

By eliminating the need for human intervention when updating customer information, the agency was able to save \$13 million and address the \$2.7 billion in fraud annually.

Robotics gave the organization flexibility in terms of when changes could be processed, enabling around-the-clock progress. What's more, the solution ensured zero errors in entering the records and was able to scale to accommodate peaks of work.

Desktop automation also enabled significant efficiencies for the agency's response to requests for financial information. The robots gathered and analyzed customer data in just 15-20 seconds – data that would have previously taken an experienced agent 90 seconds and an inexperienced agent three minutes to collect. The solution, which was built in less than four weeks, led to a savings of two minutes per call and a significant reduction in customer call-backs. It enabled an improved customer experience – and one that received universal approval from the agency's advisors. Lastly, it helped ensure that advisor behavior during the calls was in 100 percent compliance with business rules.



## INDUSTRY SPOTLIGHT: RETAIL

Retailer Enables Automatic Delivery Scheduling with Robotic List Management

### CHALLENGE

One of the world's largest home furnishing retailers, which operates more than 300 stores in 43 countries, depended on a powerful infrastructure to keep operations on track and maintain customer satisfaction. Its order entry and automatic delivery systems, however, had become a weak spot for the retailer, which had 135,000 employees worldwide and 775 million customer visits each year. Bulky spreadsheets were prone to human error, and uncounted hours were wasted during handling. The complications were increasing as the company grew, and management

was determined to develop a sturdier, more reliable order and delivery system befitting a retailer of its size.

## SOLUTION

The retailer partnered with NICE to identify a solution that would work across a wide range of situations and geographies: NICE Robotic Automation. The solution automatically checked for customer orders, including third-party manufactured goods, and generated labels for the boxes. Through desktop automation, it delivered callouts to contact center agents' screens, with consolidated information for open delivery slots based on the region and type of goods.

The majority of customer deliveries were uncomplicated and required little if any human attention, but the existing system produced two massive lists: 1) orders that had successfully arrived at their destination and 2) orders that had encountered an error during delivery. NICE Robotic Automation allowed the retailer to address both groupings: Robots handled the success list and entered delivery requests – a repetitive, simple task needing minimal oversight. The error list was forwarded to desktop robots for further action. Those robots facilitated the customer follow-up experience by presenting call agents with delivery times and contact information. The system was flexible enough to coordinate with 23 delivery vendors across multiple regions.

## RESULTS

The robotic automation system saved time and improved accuracy, eliminating 100 percent of order entry errors. For the automatic delivery scheduling, NICE Robotic Automation was able to automate processes and tasks associated with the equivalent of 16 full-time employees. The robots were powerful enough to handle 150,000 delivery records annually, or a total of 4,000 hours of work. The desktop robots, which managed the error list, were able to process 50,000 delivery records each year, saving the retailer more than 1,000 hours of work annually.

Together, they helped the retailer reach its goal of a faster, more accurate automated order and delivery system, thereby dramatically improving the customer experience.



## INDUSTRY SPOTLIGHT: TELECOMMUNICATIONS

Leading Telco Provider  
Cuts Handling Time,  
Saving \$3M+



### CHALLENGE

One of the world's largest telecommunications providers, with 300 million customers in 24 countries, was under pressure in a highly competitive industry characterized by stagnant revenues and increasing operating and capital expenditures. With processing and management of many services performed manually, the telco leader's contact centers were experiencing a large number of errors and delays, and costs were increasing rapidly. To retain its industry-leading position and increase customer satisfaction levels, the organization turned to

NICE to improve process quality, reduce delays and eliminate mistakes in its contact center, all while reducing operating costs.

## SOLUTION

With complex customer management systems, the company needed a tool that would allow it to quickly adapt to changing customer and business requirements and sell products and services directly from the contact center quickly and simply. To address these needs, the telco implemented the NICE Robotic Automation solution to automate the previously manual processing and management of the many services the company provides its customers.

With the new solution, more than 100 robots were used to execute and monitor 23 back office processes, including the upselling of services and offerings. The telco was able to automate several systems to replace inconsistent, error-ridden manual processes involved when customers rent a new device, providing quality control and 24/7 access for customers.

The solution was scalable, ensuring that customers received efficient, quality service, even during peak demand.

## RESULTS

With NICE Robotic Automation, the telco leader was able to reduce the number of errors and delays, which had a direct impact on the perceived customer experience. The handling time for contact center agents to upsell a package dropped from 42 to 19 days, and the telco realized an 80 percent reduction in the time required to rent a new device, to four minutes from more than 20.

With routine processes completed flawlessly, every time, the company no longer had to allocate time for making corrections and was able to trust in its ability to deliver a consistently high-quality customer experience. The solution also enabled the telco to make changes and adjust to new demands at the contact center, such as offering new products and services quickly, further increasing customer satisfaction.

Overall, automation of front- and back-office processes resulted in a total cost saving of nearly \$3.5 million within 24 months.



## INDUSTRY SPOTLIGHT: UTILITIES

Oil Giant Streamlines  
15,000 Monthly Address  
Change Requests

### CHALLENGE

With 80 contact center agents processing 15,000 address change requests a month, a leading oil and gas multinational company wanted to streamline its processes and lower its historically high error rates. The organization, which provides services across the entire energy chain in 79 countries, wanted to free up agents to focus on higher value tasks and increase the accuracy of its processes, ensuring a better customer experience for its millions of customers around the world.

## SOLUTION

The oil leader's executives knew that making meaningful improvements to the customer experience would require automating and consolidating some of the agents' tasks. The company turned to NICE Robotic Automation to streamline processes and improve error rates. The solution consolidated the user interface of previously disjointed steps, simplifying the address change process. With the move to a single interface, agents were able to gather required customer data and have robots automatically create a new account in the internal CRM system and conduct a meter check for the customer's new address. Four NICE Robotic Automation robots handled owner change requests in the CRM system as well.

## RESULTS

The oil company was able to significantly reduce agent handling time for each customer address change request, from an average of 11 minutes per case to one minute.

Total handling time was also cut in half, allowing agents to address more cases per day.

NICE Robotic Automation enabled the organization to eliminate all data input errors, removing the need to allocate resources to correct mistakes. With the streamlined address-change process, the oil leader was able to empower its agents to focus on higher-value customer interactions and operate more efficiently.



## INDUSTRY SPOTLIGHT: TRANSPORTATION

Courier Company Cuts  
Claims Processing Time  
from Weeks to Hours

### CHALLENGE

A courier delivery services company with more than 300,000 employees worldwide handled about 2.5 million shipments a day. With 22 physical contact centers supporting 14 languages, providing fast, excellent customer service was proving to be a challenge.

Its contact center agents, who used an average of 17 applications to address customer service inquiries, were inundated with claims processing requests. Each request took six to eight weeks to resolve, resulting in a high volume of phone calls from customers asking about the status of claims. To address customer dissatisfaction with the

lengthy resolution times, protect the brand and retain customers, the organization often paid claims without fully investigating them.

The contact center also handled customer requests for package redelivery, further increasing the volume of phone calls and the opportunities for error.

The courier company needed to reduce operating costs and improve customer satisfaction levels by cutting down on resolution time and more efficiently managing package redelivery scheduling.

## SOLUTION

The routine tasks involved in processing claims and scheduling redelivery demanded an accurate, scalable and efficient solution. To meet these needs, the organization implemented NICE Robotic Automation. The solution automatically reviewed all claims and checked refund eligibility in various systems based on business rules. The robot transferred payments and notified customers via email, all within a matter of hours. The solution also allowed the organization to automate the scheduling of package redelivery by extracting each request from the database, creating a ticket and updating the database with the new status – all without involving the contact center agent.

## RESULTS

With contact center agents no longer required to manually review each inbound claim, a time-consuming and error-prone process, the courier company was able to free up resources for other customer support issues.

The average time to process claims dropped dramatically, from 6-8 weeks to just 2-3 hours, significantly improving customer satisfaction levels.

NICE Robotic Automation also allowed the organization to realize zero process errors, eliminate unjust claims payments and decrease inquiry call volume.

By leveraging the power of NICE Robotic Automation for its package redelivery scheduling, the organization was able to support 34 package redelivery options with a reduced error rate – just two percent – while lowering the volume of calls.

By automating these routine processes, the courier company was able to free its contact center agents from routine, high-stress tasks, enabling them to be more proactive and productive in their relationships with customers.

# CONCLUSION: START YOUR AUTOMATION TRANSFORMATION

Offering the smoothest, easiest interaction delivers a competitive advantage through increased customer satisfaction, and it is essential to reaching – and maintaining – industry leadership. The customer experience, however, is frequently defined by hidden processes that have little to do with customer interaction. Businesses that tighten their back offices can operate more efficiently and reduce errors.

The organizations described here succeeded in their use of robotic automation because they implemented it strategically and thoughtfully. Every organization has clerical, time-consuming tasks that demand accuracy and speed, but don't require decision-making to accomplish. Whether data entry related to a credit card fraud investigation or back-office processes required to upsell services and offerings for a telecommunications provider, these activities have a profound impact on the productivity of the organization.

NICE Robotic Automation offers a solution to free up resources from these mundane, yet mission-critical jobs, across multiple functions. Identifying these tasks in your own operation is the first step towards proactive, productive customer relationships, because once your agents are able to hand these tasks off to robots, they can focus on the customer, and on the more engaging activities which make their jobs more satisfying.

Join the growing number of organizations leveraging the power of robotic and desktop automation, and take your service level to new heights!

**Contact us** to start your automation transformation.

## About NICE Ltd

NICE (NASDAQ: NICE) is the worldwide leader of software solutions that deliver strategic insights by capturing and analyzing mass quantities of structured and unstructured data in real time from multiple sources, including, phone calls, mobile apps, emails, chat, social media, and video. NICE solutions enable organizations to take the Next-Best-Action to improve customer experience and business results, ensure compliance, fight financial crime, and safeguard people and assets. NICE solutions are used by over 25,000 organizations in more than 150 countries, including over 80 of the Fortune 100 companies.

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