# RPA Opportunities

This document gives an overview on the proposed plan to use RPA to improve operational efficiencies

## Customer Onboarding

### Current Process

On winning a new customer, our Implementations team are required to manually build Customer specific profiles within our system infrastructure.

They are required to create 1 profile in the Online Booking Tool (Serko) and another Profile in the Mid Office (Tramada)

Each implementation includes repetitive tasks that are inefficient, time consuming and reduces workload.

### Proposed Solution

Implementations manager supplies minimal information via a UI, Automation is then triggered to build the customer profile in the OBT and Mid Office based on the information provided.

Once built, the IM can then go into each build and tweak to meet the customer needs if required.

### Benefits

* Reduced customer onboarding timeframe
* Improved Implementation consultant efficiency
* Increased Implementation capacity per consultant
* No requirement for increased team headcount

## Data Collection/Update

### Current Process

A request is raised to either extract information from one of our system databases or mass update a specific value across multiple fields.. Currently we have 2 options:

* Manually process the information which is time consuming
* Request Third Party to process which costs each time

This can delay our ability to provide or update data in a timely manner or impact on other projects being worked on.

### Proposed Solution

Utilising RPA to capture the specified data in the specified system and populate in required format or mass update fields dependent on data provided.

### Benefits

* Time saving
* Cost saving