Robotic Process Automation

Case Study

Executive Summary

This series of practical insights highlight leading business solutions powered by SR Business Services and Lee Smart Technology Solutions (SRLS). These solutions have helped deliver value for some of our most important clients in the industry as part of their digital transformation.

RPA case studies of fortune 1000 companies that we contributed to achieve their cost and efficiency optimization goals,

Customer Order Processing

Done for UK based upmarket retail giant with 1.5 Billion USD revenue.
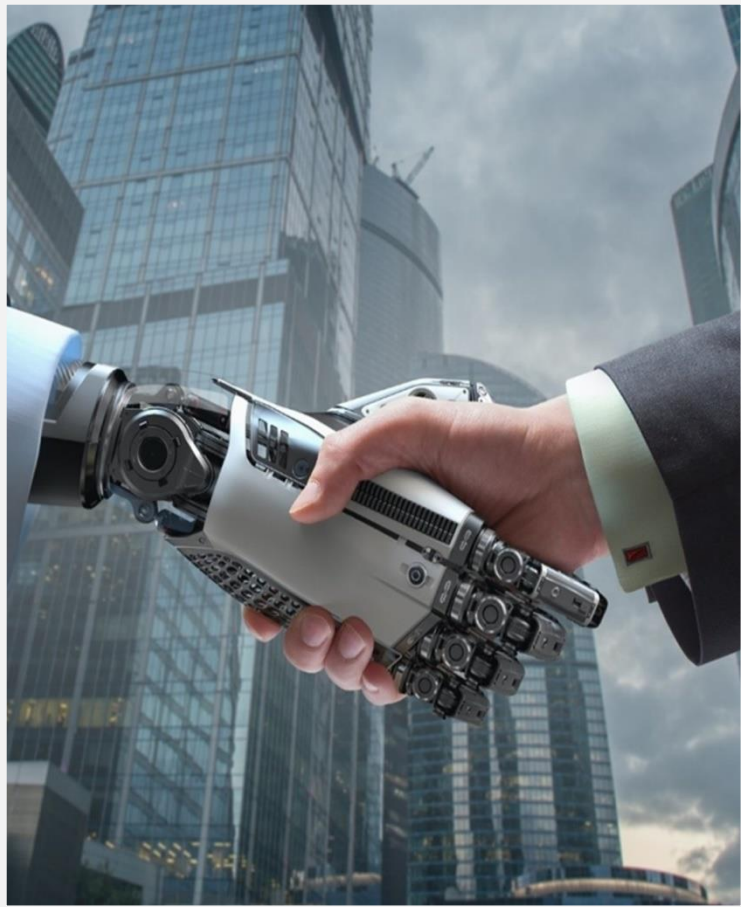As per priority, we have saved 40 to 50 FTE's in the organization.

Quarterly Financial Reporting

Done for UK based global pharmacy Retail giant with 40 Billion USD revenue. As per priority, we have implemented 80 to 100 repeated routine human interventions.

AGENDA

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Robotic Process Automation (RPA)

Robotic Process Automation (RPA) today is the use of software with artificial intelligence (AI) and machine learning capabilities to handle high-volume, repeatable tasks that previously required humans to perform.
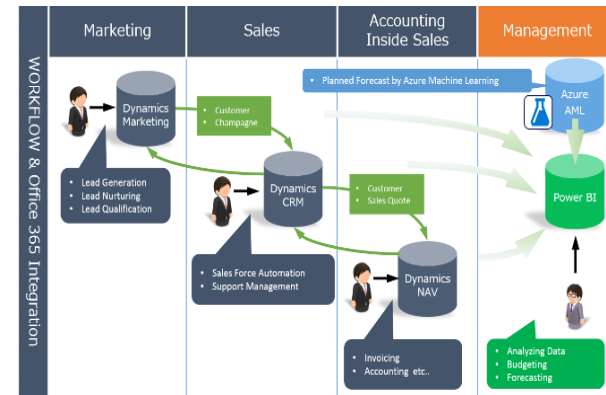
RPA & Data Migration and Management

This edition provides a use case for taking advantage of Robotic Process Automation (RPA) in the Data Migration and Management for greater consistency reliability and efficiency.

Data Migration for Customer Order Processing

The Data Migration Management is charged today by providing more value by delivering business insights, optimizing costs, and improving the governance process.
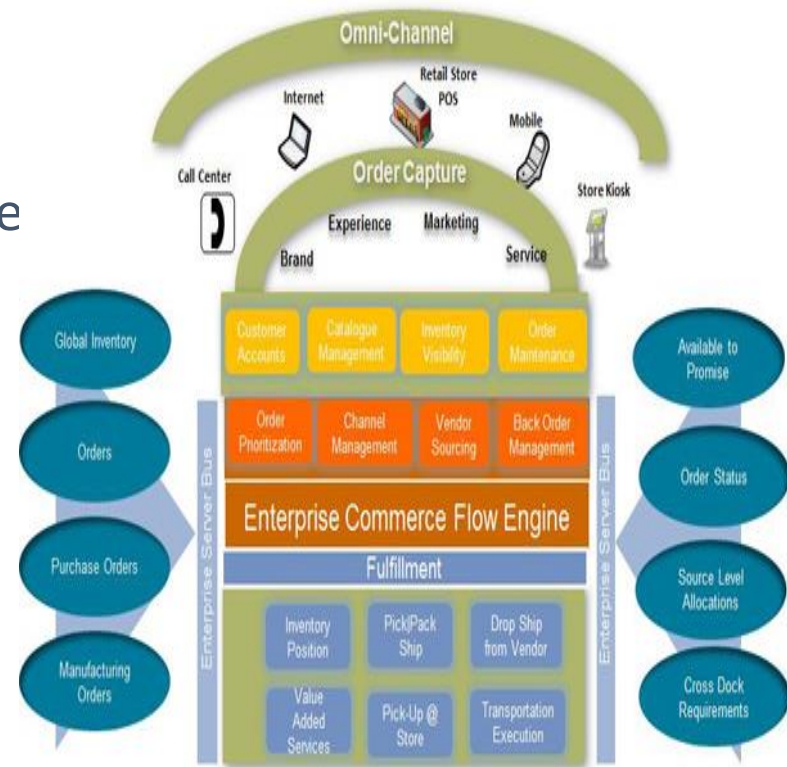
Case Study1: Customer Order Processing

Use case Integration of Data between ERP and E-commerce Databases

- ✓ Upmarket retail chain at London, UK

- ✓ Growth from 33% to 83 % - Year on Year

- ✓ BOLT (Building Omni Channel Luxury Togethe program

Scenario: Businesses has to synchronize online orders, invoice workflow, email exchanges, and Excel spreadsheets, requiring a business to log in and out of multiple systems, copying and pasting data between different sources and formats.

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Customer Order Processing Cont...

Solution Implemented: By replicating human data entry, RPA deployed to transfer data quickly, reliably and with a full audit trail. Data became 100% accurate and quality of subsequent business decisions improved. Upmarket retail chain at London, UK.

Benefits:

REDUCTION
12 fewer FTEs

PRODUCTIVITY SAVING
£200K
in 1st 3 months

SPEED
3-month
backlog cleared
in weeks

Intangible Benefit: Also provided an electronic interface to customer and supplier systems where a system to system interface was challenging.

Case Study 2: Quarterly Financial Reporting

Use case Region-wise quarterly financial reporting for different levels of stakeholders.

- ✓ Pharmacy retail chain based at Nottingham, UK.

- ✓ Independent profit centres along 7 verticals.

- ✓ Complex financial reporting needs due to recent Mergers with a US pharmacy retailer.

Scenario: Region-wise quarterly financial reporting into powerpoint presentations, spreadsheets with trend charts and commentary and sending to respective recipients.

Quarterly Financial Reporting Cont…

Solution Implemented: By replicating human data preparation, RPA deployed to identify data quickly, reliably and with a full audit trail.

Data became 100% accurate and quality of subsequent business decisions improved.

Benefits:

EFFICIENCY

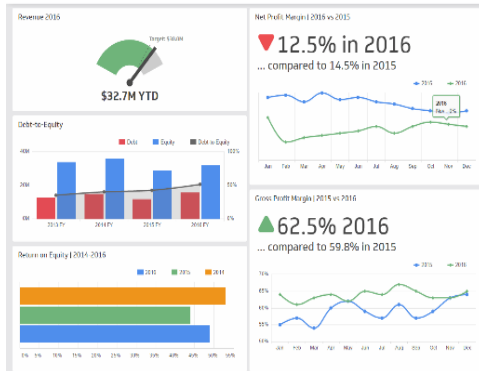Reduced processing time by **90%**

REDUCED RISK

EMPLOYEE SATISFACTION

Significantly improved
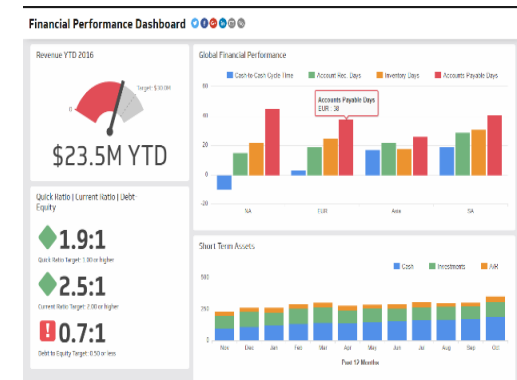
Quarterly Financial Reporting Cont...

KPI Dashboard

Client issues/challenges: Financial Reporting

The client's process of generating quarterly financial reports was extremely manual and time-consuming. Consistency, accuracy and, efficiency were lacking. Users would:

✓ Obtain information from multiple finance systems via screenshots or by copying data into spreadsheets and then reworking it.

✓ Utilize different reports and data sets from the finance systems, creating issues with data integrity and consistency.

✓ Consolidate data and reports manually, with varying templates and commentary.

Quarterly Financial Reporting Cont…

Our Solution

We are leveraged leading RPA and reporting technologies to design a robotized process for quarterly financial report creation.

The solution involved:

- ✓ The bot accessing the financial reporting systems simulating multiple roles to get region-specific reports.
- ✓ Also included automating data into spreadsheets and the creation of trend charts.
- ✓ Updating a standardized PowerPoint template with new data and charts including required formatting.

Quarterly Financial Reporting Cont...

Our Solution

- ✓ Including commentary around the financial results based on what was provided to the bot (email/files) and the bot was also taught to generate first level commentary based on trends observed.
- ✓ A final step involving sending automating email with the quarterly financial report recipients.

Quarterly Financial Reporting Cont...

Our Solution - Business Value

✓ **Up to 70 Percent Time and Cost Savings** through automated creation and distribution of quarterly reports

✓ **Customization:** The RPA solution can be easily configured by business users to make changes as needed- such as to the templates, the source of financial data, recipient of reports - without depending on IT.

✓ **Increased Reliability and Consistent Reporting:** RPA configured to create quarterly reports the same way every time, leveraging the right data and improving output quality.

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Quarterly Financial Reporting Cont…

Our Solution - Business Value

Higher Productivity and Performance: Software robots perform tasks at digital speed 24/7/365 without vacations or illness and reduce risk due to fewer errors, accidents, regulatory violations and fraud.

Greater Employee Satisfaction by eliminating repetitive tasks allowing employees to focus on strategic initiatives. Human free to innovate and, create.

Increase Audit Capabilities: Software robots keep an audit trail documenting every action and result.

Please Contact for any Queries and Free Guidance

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