

ATE

UiPath

Customer Use
Cases Slides
in
Finance and Accounting



Location:
Japan

Department
Procurement and
Supply Chain /
Finance, Accounting
and Tax / Legal and
Compliance

Industry
Financial and
insurance
activities

PROCESS

Financial services operations

CHALLENGE

The financial organization's operational processes were costing them productivity, operational efficiency, and cost control throughout their group. The organization set goals of cost reductions of ¥50 billion by the end of FY3/2020 and ¥100 billion in the medium term.

SOLUTION

After analyzing processes by establishing an RPA Center of Excellence (CoE), the key areas the company decided to focus on were compliance and risk operations, information-gathering processes to enhance sales and planning, branch operations, routine operation center processes, and routine HQ processes. This automation enhanced governance, security, and standardization of development methods via the Center of Excellence.

CSM001 | Customer: SMFG and SMBC

RESULTS

- **650,000 hours** saved annually across **200** operations
- **1 million** hours of capacity saved
- More than **3 million** hours saved by the end of 2020
- **\$450 million** cost reduction by 2020

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ENTERPRISE RPA STORIES – HYBRID RPA

WORLD'S LARGEST HYBRID RPA IMPLEMENTATION



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CUSTOMER:

SMBC Bank, Japan

IMPLEMENTATION TIME:

5 months

- Compliance /risk operations
- Information gathering processes used to enhance sales & planning capabilities
- Support branch operations
- Routine Operation Center processes
- Other high volume routine operations within the Headquarter departments

¥50B

Cost reduction by 2020

3M

Hours created by 2020 (Over 1 Million today)

1,500

Target workload equivalent

200+

Operations Automated

5 SIs

Accenture, EY, Deloitte, IBM, and PwC



Department
Procurement and
Supply Chain

Industry
Manufacturing

PROCESS

Enterprise-wide automation effort

CHALLENGE

The company had already implemented RPA and wanted to expand their automation scope to an enterprise level. Achieving a high-scale adoption and enhanced productivity were the company's two main objectives.

SOLUTION

GE created an RPA Center of Excellence that spanned multiple geographies and trained hundreds of finance professionals on RPA with UiPath's guidance. They saw great results with the first automation and decided to incorporate machine learning and business process management (BPM) into their RPA stack. The company declared: "We selected UiPath for software versatility and product vision. We are going to continue pushing the limit on process automation using RPA as a cornerstone."

CGE001 | Customer: General Electric (GE)

RESULTS

- **\$150 million** productivity benefit by the end of 2017

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ENTERPRISE RPA STORIES – BACK OFFICE

UNATTENDED ROBOTS TRANSFORM PRODUCTIVITY

CUSTOMER:

GE

IMPLEMENTATION TIME:

Q2, 2016 - ongoing

PROCESSES AUTOMATED:

Finance, HR, Supply Chain, IT, Legal

162

Robots deployed

150M+

From increased productivity

\$28.3M

Annualized direct benefits
first year

U.S. Center of Excellence is
deploying RPA globally across
process areas

COE dashboard allows senior
leadership to see impact by
geography and process type.

“GE selected UiPath for software
versatility and product vision. We
are going to continue pushing the
limit on process automation using
RPA as cornerstone.”

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Department
Procurement and
Supply Chain

Industry
Manufacturing

PROCESS

Financial operations

CHALLENGE

The company envisioned their future of finance to combine human insights with intelligent automation to create a digital workforce. They had been investing in data analytics, predictive modeling, process improvement, data science, and robotic process automation in order to replace their manual, time-consuming financial operations processes.

SOLUTION

The HP Finance branch developed templates and tools for business units and created a process to integrate subject-matter experts and technical teams with the process owners. These best practices have delivered bottom-line benefits and a culture of innovation. UiPath deployed 109 Robots to drive their RPA development.

RESULTS

- **62,560 hours** saved by the end of 2017
- **\$1.6 million** saved by the end of 2017



Department
Procurement and
Supply Chain/
Finance, Accounting
and Tax / Legal and
Compliance

Industry
Financial and
insurance
activities

PROCESS

Global finance delivery processes

CHALLENGE

KPMG GDC performs quarterly and annual audits of the financial reports for their customers, which include footing, cross-footing, checking internal consistency, recalculation of balance sheets, and error checking. These processes were complex, manual, repetitive, and time-consuming, with a logic purely based on judgment but no universal predefined rules.

SOLUTION

The UiPath Robot standardized the business process logic and validated data in tables and in the narrative. UiPath applied Stanford natural language processing (NLP) to textual contents, extracted tables using PDF extraction engines, and then performed validation of the primary balance sheets and other financial data.

RESULTS

- Up to **85%** accuracy improvement
- **54,000 hours** saved annually
- **45%** of the audit process automated

ENTERPRISE RPA STORIES – BACK OFFICE

RADICALLY HIGHER ACCURACY IN PUBLIC COMPANY AUDIT DELIVERY



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CUSTOMER:

KPMG Global Delivery Center
(GDC)

45%

of effort automated

85%

Maximum accuracy improvement

IMPLEMENTATION TIME:

Within 2 months

54,000

Hours saved annually

Replaced IBM Watson which achieved only a 25% maximum accuracy improvement

PROCESSES AUTOMATED:

10Q and 10K audit and validation process pre-filling (automating Footing, Cross-Footing, PY tie-outs and consistency checks)

45%

Faster processing time

Natural language processing applied to textual content, extraction of tables, and validation of financial data



Location:
South Africa

Department
Procurement and
Supply Chain /
Finance, Accounting
and Tax / Legal and
Compliance

Industry
Financial and
insurance
activities



PROCESS

Insurance broker-driven service delivery

CHALLENGE

The customer, a large insurer in South Africa, handled 1.5 million emails per year from the broker community. Employees had to interpret information from the emails and review attachments to identify content type. The process required accuracy and meeting timely expectations. Completing the workflow in compliance with service-level agreements (SLAs) and specific regulatory and statutory provisions represented a big challenge.

SOLUTION

Using machine learning, natural language processing (NLP), intelligent optical character recognition (OCR), analytics capabilities, and the UiPath Platform, the company created an expert single user interface. The Robot interprets the content contextually from the email, classifies and extracts all the necessary documentation, updates necessary systems, interacts with the human users to complete specific instructions, and delivers confirmation once the process is complete.

PL001 | Customer: Hollard Group | Partner: LarcAI

RESULTS

- **2,000** hours per month saved
- **98%** fully automated
- **600%** reduction in mean time to execute
- **91%** reduction of cost per transaction





Location:
United Kingdom

Department:
Finance, Accounting
and Tax

Industry:
Mining and
quarrying

PROCESS

Manual journal-entry processing

CHALLENGE

EDF Energy is the largest supplier of low-carbon electricity in the UK, employing around 12,500 people and servicing more than 5 million domestic-product accounts. Their robotics Center of Excellence (CoE) identified their manual journal-entry process for automation. The journal recorded all financial transactions across the company. Each time a new entry was added, a team member had to manually review it and then enter it into the enterprise resource planning (ERP) system.

SOLUTION

After forming a Robotics Center of Excellence (CoE), the company identified the financial share service centre as a great candidate for RPA. The UiPath Robot picks up the entries, checks that they're in the correct format for the ERP system, and inputs the entries. It also contacts team members if errors arise. The UiPath Platform allowed the company to start with one Robot and build out more as needed.

CE001 | Customer: EDF Energy

RESULTS

- Implementation in **6 months**
- **£100,000** saved in software license and development costs
- **70 man-hours** saved per month
- **£50,000** estimated annual savings
- **2x** the volume handled by Robots

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Location:
UK

Department:
Legal and compliance

Industry
Arts,
entertainment,
and recreation



PROCESS

Customer verification, payment reconciliation

CHALLENGE

Ladbrokes knew RPA could help reduce errors and save time, but their first attempt at automation hadn't gone well. As one of the UK's largest betting and gambling companies, their manual processes touch the experience of many customers.

SOLUTION

With UiPath, automation transformed their core processes in the customer-compliance operations department and improved customer experiences. After selecting four pilot processes, including e-wallet balance reporting, the company saw dramatic reductions in processing times, saving effort and freeing employees up for other work. Because of this success, they decided to apply RPA to their Know Your Customer process, which verifies ID documents of customers and escalates the case to a customer service rep if an error is detected.

CLA001 | Partner: Lawrence & Wedlock | Customer: Ladbrokes Coral Group

RESULTS

- **88%** faster than manual processing
- **322** applications processed
- **48** man-hours saved per month
- **100%** accuracy
- **7,000** customer verifications handled in the first 4 weeks
- **11,000** hours saved in the first





Location:
Switzerland

Department:
Support and servicing

Industry
Professional,
scientific, and
technical services

PROCESS

Invoice data extraction, verification & shipping logistics

CHALLENGE

The company receives invoices and shipment orders from thousands of vendors all over the world. They struggled with a manual process for extracting, verifying, and coordinating information that was slow and prone to errors. Manually entering and checking data was labor-intensive, and important stakeholders were often left waiting for manually communicated shipping updates.

SOLUTION

With UiPath Robots, they were able to successfully automate significant portions of the invoice process and free employees for other work. Clariant was also able to eliminate delays for shipping updates and automate portions of the shipping process, removing the need for printed documents. These pilot programs were so successful that Clariant is now building to a vision whereby 20% of the productivity in its shared-services centers will be the result of RPA by 2022.

RESULTS

- **80%** of invoices are processed automatically
- **2,500** invoices processed per month
- **40,000** printouts are saved per quarter



ENTERPRISE RPA STORIES – BACK OFFICE

AUSTRALIA'S LARGEST MUTUAL BANK EXPERIENCES IMPROVED CUSTOMER ENGAGEMENT



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CUSTOMER:

Heritage Bank, Australia

IMPLEMENTATION TIME:

2 months

PROCESSES AUTOMATED:

Daily direct debit review & risk management

95%

of effort automated

98%

Manual effort reduction

6

Months to ROI

Zero

Errors reduced to 0%

12X

Faster processing time

Improved customer service, governance and compliance

ENTERPRISE RPA STORIES – BACK OFFICE

FRENCH INVESTMENT BANK STREAMLINES INTERNATIONAL PAYMENTS

CUSTOMER:

Investment Bank, France

IMPLEMENTATION TIME:

Within 4 weeks

PROCESSES AUTOMATED:

Sub-process of the bank's payment system; makes international payments on behalf of client

100%
of effort automated

11
Months to ROI

90%
Processing time reduction

20%
Gain in employee's capacity for higher value work.

Zero
Errors reduced to 0%

More detailed compliance and non-repudiation audit logs.

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ENTERPRISE RPA STORIES – BACK OFFICE

RETAIL BANK BOLSTERS ITS FRAUD PREVENTION CAPABILITIES



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UiPath

CUSTOMER:

Retail Bank, Greece

IMPLEMENTATION TIME:

2 months

PROCESSES AUTOMATED:

Retail Fraud Prevention, a subset of the Credit Underwriting process

95%

of effort automated

50%

of Analyst review time freed for higher value work.

5

Months to ROI

Zero

Errors reduced to 0%

12x

Faster processing time

More detailed compliance and non-repudiation audit logs.