RPA PROGRAM
CUSTOMER SUCCESS STORIES

Educate    Evaluate    Execute    Enable
Industry Index

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RPA90X was a gateway for many saving opportunities at this Loan Servicing Company. The client began with the RPA90X Program and with the guidance and expertise of the Accelirate team saw an immediate ROI as they had three RPA Processes designed and implemented by the end of the 90 Days. Since then, the client has worked with Accelirate to automate over 150 processes in two short years and has an automation pipeline built out for the next three years of projects.

“When starting out, the main focus was streamlining and making our organization more efficient. We did a number of RPA proof of concepts, partnered up with a good vendor, and then we started doing proof of value to show the business that building a strong automation program for our organization was something that could be done.”

VP of Enterprise Optimization, Governance and Risk at a National Loan Servicing Provider
Electronic Default Reporting (FNMA) Automation

**Business Goals**
- Decrease Loan Processing Time
- Support 10,000+ Loans Daily
- Classify Loans Correctly to Earn Incentives

**Results**

- **$50,000** Monthly Revenue Increase
- **5,200+** Monthly Man-Hours Saved

In this complex process, the bot goes through a waterfall matrix to update each loan status correctly as Current, Paid Off, or Delinquent. The bot is able to consider 33 different potential statuses based on 42 logical indicators and update the status accordingly. The bot also labels the loan 1 of 5 different priority levels underneath the three Delinquent Loan categories which are: Loss Mitigation, Bankruptcy, and Foreclosure. The main focus of this automation was to eliminate all errors from the human process; if all loans are classified correctly the business earns a $40,000 incentive from Fannie Mae and a $10,000 incentive from Freddie Mac.
## Business Goals

- More Accurately Target Consumers
- Reduce Number of Mailouts
- Increase Response Rate

## Results

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>20-25%</td>
<td>Reduction of Unanswered Letters Sent</td>
</tr>
<tr>
<td>10%</td>
<td>Increase in Number of Responses</td>
</tr>
</tbody>
</table>

After a thorough review of the client's business model and an Exploratory Data Analysis, Accelirate created and trained a Machine Learning Algorithm to better predict the likelihood of a borrower to refinance their loan. Optimized with the best model to maximize the predictive power and packaged perfectly to meet the client's needs, this predictive modeling algorithm is run monthly by the marketing department to identify the borrowers that are most likely to respond to the refinance offer, therefore, determining which borrowers should be sent a refinance offer letter. This model was found to be far more accurate in predicting which customers were likely to accept the offers, thus, reducing the number of offers mailed to buyers while increasing the number of responses.
Suspense Processing Automation

Business Goals

- Give Employees More Time to Work on Other Tasks
- Increase Customer Satisfaction
- Eliminate Errors

Results

$13,000+
Monthly Payroll Savings

320+
Monthly Man-Hour Savings

A Major Loan Servicing Company is responsible for managing their borrower’s suspense accounts. The suspense account is a catch-all account in which the borrower’s money is stored until the loan servicing firm decides where to allocate the funds. The loan servicing company has a team in their administrative department dedicated to looking through loans daily and moving money from the suspense account to make loan payments to the appropriate area on behalf of their clients. Each person on the team is responsible for completing 160 loans a day, which consumes 4 hours of every workday. Accelirate created an automation that processes the daily list of loans and based on priority, pays as many fees and advance payments as possible with the money in each borrower’s suspense account. After the Accelirate Solution was implemented the client was able to double the amount of time their full-time employees have each week to work on other tasks and eliminate all errors in the suspense process, making for happier customers as all their payments and extra fees are now accurately paid on time.

The Solution Results from this process were calculated based on a team of four FTE’s spending 4 hours/day on the original process.
GSE Claims REO- Fannie Mae Automation

Business Goals

• Increase the Number of Items Claimed to Fannie Mae
• Reduce Cycle Time
• Eliminate Errors

Results

$4,000+
Monthly Payroll Savings

124+
Monthly FNMA Claims

When a servicing company buys a loan, they become responsible for repairing the loan, providing the necessary upkeep and maintenance moving forward with the loan, and making a claim to Fannie Mae for each new loan to be reimbursed. Because this process requires the utmost efficiency, process automation was the best solution. This automation includes formatting the loan using a structured Fannie Mae Loan Matrix, correctly matching the internal loan description to the matrix description, and then providing claim sheets to Fannie Mae with the appropriate attached invoice. It is important that this process be completed error-free because if Fannie Mae is sent information that doesn’t exactly match what is listed in their matrix system or the invoice is not attached to the claim sheet, the loan servicing company attempting to claim the loan will not be reimbursed.

The Solution Results from this process were calculated based on the difference between the original claim process time and the automated claim process time.
Loan Adjustment Processor P1 Automation

Business Goals
- Reduce Employee Overtime
- Meet all Project Deadlines
- Eliminate Errors

Results

$4,500+
Monthly Payroll Savings

200+
Monthly Man-Hour Savings

The Default Management Department was put in charge of ingesting each list of loans bought from outside banks. The department was tasked with having to confirm and validate all aspects of the loans quickly, seamlessly, and with urgency as the data needed to be validated and entered within a set timeframe after purchase. This task involved confirming all aspects of the loans purchased matched the information that was recorded internally before official purchase and verifying loan level info such as addresses and the loan borrower’s social security number. This process was put into place to ensure that all loan information could be quickly confirmed and completely entered into the system without any mistakes. The automation also made it possible to finish the task in less than three weeks which is a major improvement over the five weeks, plus overtime, it took employees originally to meet deadlines.

*The Solution Results from this process were calculated based on the 2-week reduction in process time.*
Automating Mortgage Breach Letters

### Business Goals
- Reduce Default Management Cycle Time
- Reduce Employee Overtime
- Accommodate for Increased Volume

### Results

| Annualized ROI Savings | $145,000 | 3,800+ Annual Man-Hour Savings |

The bot gathers all relevant default loan information, determines if the loan default should be labeled pre-foreclosure, foreclosure, bankruptcy, or loss mitigation, and then determines which pre-foreclosure defaults are to be labeled as "breach". From there, the bot aggregates all data for the loans labeled "breach" and compiles it into U.S. State Specific Breach Letters that are sent out to borrowers to notify them of their breach status. This process is able to accommodate for increased volume in cases of mortgage portfolio acquisition, eliminates all errors made in the breach letter and labeling processes, and eliminates the need for employee overtime due to lack of business resources. This waterfall matrix automation solution was unique in design and was able to fully automate this process for the client.

*The Solution Results from this process were calculated based on the size of the team assigned to the original process and the overtime needed to complete it.*
Notification of Overdue Items | Accounts Receivable Follow Up

Business Goals

- Increase Efficiency
- Increase Accuracy
- Automate Broker Emails
- Merge Invoices into one PDF
- Standardize Overdue Item Emails

Results

$7,500
Monthly Payroll Savings

1,200+
Monthly Invoices Processed

The bot extracts contact billing email addresses from the accounting system, locates and categorizes invoices that are overdue based on number of days past due, and generates an email that is sent to each policy holder and their respective broker notifying them that a payment is overdue. The email is made up of both a static and dynamic part. The static part is placed by the bot automatically in every email and the dynamic part consists of items that are unique to each broker and policy holder such as policy statement, invoice, and broker number, and are updated in each email by the bot accordingly. As a final step, the bot is able to check and notify the appropriate brokers if their client’s insurance policy payment invoices are unavailable for download or if the invoice email delivery failed.

The Solution Results from this process were calculated based on the difference between the original invoice process time and the automated invoice process time.

"The Accelirate development team is one of the finest teams I have ever worked with in my 36 years in the industry. They are competent, professional, communicative, and document their plan thoroughly so as to address any concerns prior to developing; the way software engineering should be. They are proficient at measuring twice and cutting once."

Vice President
at a National Bank and Holding Company
Automating Claims Allocations

Business Goals

- Increase Efficiency
- Increase Accuracy
- Update Claims Allocation System in Real-Time

Results

$3,900+
Monthly Payroll Savings

170+
Monthly Man-Hour Savings

The bot is able to log into the claims tracking system to update current tracking sheets and create new daily tracking sheets to correctly allocate all cash claims. The bot then opens the payment ledger report and enters all the relevant claim information into the ledger and accurately updates the status of each claim into the system. With the client's business goals in mind, Accelirate created this automation to run as quickly as possible, allowing for the client's internal Claims Allocation System to be updated in real-time.

The Solution Results from this process were calculated based on the number of FTE's assigned to the original process.

“Our organizations pilot bot has saved us many hours a month in work previously completed by team members. It also has resulted in our deliverables being more timely, thorough, and accurate.”

Vice President
at a National Bank and Holding Company
## Business Goals

- Eliminate Task Management System
- Reduce Cycle time
- Eliminate Errors

## Results

<table>
<thead>
<tr>
<th></th>
<th>Monthly Payroll Savings</th>
<th>Monthly Man-Hours Saved</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>$4,800+</strong></td>
<td></td>
<td><strong>200+</strong></td>
</tr>
</tbody>
</table>

Instead of assigning new Insurance Policy submission tasks in a task management system to notify the internal team of underwriters, an automation was created to merge this step with the new policy submission process and entirely eliminate the need for the task management system. The bot logs into a genius underwriter program and submits new insurance policies. Underwriters are then notified to add policy information and quotes, and then verify the policy. The bot goes back into the system and enters all the info provided by underwriter, then binds the policy. Once binded the bot downloads the policy digest and sends it to the appropriate underwriter.

*The Solution Results from this process were calculated based on the number of FTE’s assigned to the original process.*

“*The feedback from the recipients of the process has been positive and the individuals who previously completed the task are pleased as well; as they no longer have the responsibility for a task that they considered boring and repetitive.*”

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**Vice President**

at a National Bank and Holding Company
Credit Disputes: Customer Service Solution

Business Goals

- Eliminate Employee Overtime
- Reduce Dispute Resolution Time
- Eliminate Errors

Results

$16,000+
Monthly Savings

140+
Monthly Man-Hour Savings

The Credit Dispute Process involves the use of two internal systems and requires 140 hours per month, plus overtime, for their dispute team as the company receives an influx of 200+ Credit Disputes from customers daily. The original process involved the use of WebTop, an Internal Case and Resolution System, and several steps of information gathering, recording, and comparing between the two systems. This original process was prone to numerous errors that would cause delays in the dispute resolution process. To solve for the errors and reduce the amount of time it takes to resolve a customer’s dispute, we consolidated this process for efficiency and were able to create an automated version involving a single bot that runs at the end of each day, thus saving the client both time and money. The bot for this process acts as the perfect office assistant; it is able to log into the system and locate all credit disputes, gather the appropriate information for each dispute, send all relevant documents to the assigned dispute agent to follow-up with the customer personally, and then compile all the information into an excel report to send to the Credit Dispute Manager.

The Solution Results from this process were calculated based on the difference between the original dispute process time and the automated process time.
For any company, Customer Relationship Management is an integral part of running a profitable business. Being able to quickly update, upload, and download accurate and up-to-date information is important, especially for a Financial Services company, as they are responsible for monitoring customer accounts and alerting agents and customers of possible fraudulent activity. The client employs a team of investigators to spend approximately 20 minutes per alert manually filling out Know-Your-Customer (KYC) Templates. At volumes of 1,000 alerts per month, the team spends a large amount of time each day capturing data and submitting supporting documentation to evidence and several other internal systems via KYC Template. In an effort to save money and reduce the time it takes to alert customers of possible fraudulent activity, an RPA Bot was implemented. This automation requires the bot to Search for Customer Cases, retrieve data, assign cases to agents based on priority, update all systems with new customer and case information, summarize changes, fill out the KYC Template in its entirety, and send the manager a consolidated KYC and customer case report created in excel at the end of each day to notify them that the data and case are "ready" for an agent to process.

The Solution Results from this process were calculated based on the difference between the original process time and the automated process time.
For this Large Energy Company, RPA90X helped them to fully understand RPA and the many benefits it offers beyond just time and money saved. By the end of the 90 Days the client had two processes implemented and since then has seen over $15,000 returned to their business monthly. The success they have seen and the relationship they have built with Accelirate during the implementation of their current processes has inspired them to move forward with their RPA Journey and build out an even larger automation program by continuously looking for new process automation opportunities to add to their pipeline.

"RPA90X was an excellent program to help us quickly understand how best to utilize RPA in our unique organization. With the blueprint that RPA90X delivered we are confidently moving forward with new automation opportunities found on our RPA journey."

Business Optimization Lead
at a Large Energy Company
Equity Investment Reporting

Business Goals
- Reduce Overtime
- Increase Project Investment Analysis Accuracy

Results

$30,000+
Monthly Payroll Savings

60+
Monthly Overtime Hour Savings

The client employs a team of Financial Analysts each month to close out all projects from the previous month and run queries on project cash flows. Using finance department applications and a business warehouse system in SAP, this process includes running a variety of reports for the internal audit department, high-level cash flow monitoring, cash flow reporting checks, distribution of the internal Investment Roll Forward Schedule, and signing off on the equity/cost investments for all company projects. To increase efficiency and reduce Analyst overtime at the end of each month, the company asked Accelirate to automate this process. Each day of the process involves the analysis of different projects; On Day 1 the automation cleans-up and closes-out projects from the previous month, and preps for the next nine days of Project ROI calculations. Days 2-9 involve gathering data, running queries, and analyzing project equity. The Bot uses a Business Intelligence Analyzer tool to determine project progress from the past month and then calculates the project ROI based on the tool’s output. At the end of each day the bot also sends the Finance Department an in-depth excel report with a breakdown of project costs and an appropriate decision regarding whether or not the project was worth the investment and if the company should continue to work on the project.

*The Solution Results from this process were calculated based on the salaries of the Financial Analysts hired for the original process.*
Accounts Payable Automation

**Business Goals**
- Increase Efficiency
- Verify all Received Invoices
- Reduce Overtime

**Results**

<table>
<thead>
<tr>
<th>Monthly Payroll Savings</th>
<th>Monthly Man-Hour Savings</th>
</tr>
</thead>
<tbody>
<tr>
<td>25%</td>
<td>160+</td>
</tr>
</tbody>
</table>

The client receives invoices from various vendors to be reviewed, verified, and paid by the accounts payable team. The client also records an internal version of the invoice at the time of purchase that is later used for comparison when the external invoice is received from the vendor. The bot is able to compare the two invoice versions and verify that the payment amounts match. This automation is especially useful during times of increased vendor invoices; as the client receives hundreds of invoices daily. Before the bot was implemented, if an invoice was less than a certain dollar amount the staff was told not to waste time verifying the cost and were instructed to automatically pay the vendor. This automation has not only saved the client time and money spent on employee salaries, but has saved the client thousands of dollars wasted on inaccurate invoice payments, as the bot runs quick enough to verify every single invoice received in the allotted time, unlike it’s human counterpart.

*The Solution Results from this process were calculated based on the difference between the original process time and the automated process time.*
Wells Management Processing

Business Goals

- Increase Efficiency
- Reduce Processing Cycle Time
- Reduce Processing Delays

Results

65%
Monthly Payroll Savings

400+
Monthly Man-Hour Savings

This large Energy Company is in charge of thousands of oil drilling wells and employs numerous Well Managers to monitor, track, and record stats for each well such as drilling speeds, amounts extracted, and so on. Each Well Manager has to submit work completed E-Tickets for each day so that the internal teams can schedule which wells to track next and assign appropriate further action on each well based on the statistics recorded. To ensure accuracy and reduce errors, an RPA bot was implemented to take over this process. The bot is able to ingest all incoming E-Tickets from each Well Manager and accurately update the Wells Management system in real-time, thus reducing the amount of time and resources wasted in the original process and allowing for more wells to be checked each day.

The Solution Results from this process were calculated based on the difference between the original process time and the automated process time.
Processes Created

- Accounts Receivable
- Enrollment Processing
- Image Formatting using Machine Learning

Results

$120,900*

Monthly ROI

1,030+

Monthly Man-Hour Savings

For this Online Education Company, Accelirate implemented the RPA90X Program to help them get their initiatives in shape and identify which processes were the best fit for automation. With ROI as the focus, Accelirate was able to get three RPA processes in production by the end of the 90 days. We helped the client grow their automation program from zero RPA processes in place to a program that is now saving over $120,000 every month. The client continues to increase their monthly ROI by working with Accelirate and is currently implementing unique automations that include machine learning technology while simultaneously building out their RPA pipeline.

*The original ROI at the end of 90-Days was $20,900. After 9-Months the program ROI was adjusted to accommodate for the return on the process that was supplemented with Machine Learning technology.

“RPA90X helped our company to jump start its RPA program, by identifying proof-of-concept projects and adding training on how to assess projects and develop a start-to-finish project management process. We are very pleased with the results of our RPA90X program and pleased with Accelirate’s ability to tailor the program to meet the needs of our company by helping us deliver tangible results. The Accelirate team has been flexible and responsive and has used their expertise around RPA and business process design to become a valued business partner.”

VP of Internal Audit

at a Leading Online Education Service Provider
Invoice/Billing Automation

Business Goals

- Increase Efficiency
- Reduce Cycle Time
- Reduce Overtime
- Fully Automate Process

Results

$225,000
Annualized ROI Savings

360+
Monthly Man-Hour Savings

The bot is able to generate a list of clients that require an invoice for their services rendered. It then determines which of the nine possible customer segments each customer belongs to and prepares the matching customer segment email to be sent to each person on the list. The bot then sends the appropriate email to each customer with their unique invoice for services rendered attached.

The Solution Results from this process were calculated based on the number of FTE’s assigned to the original process.
## Enrollment Document Processing

### Business Goals
- Increase Efficiency
- Reduce Cycle Time
- Merge PDFs
- Accommodate for Increased Volume During Peak Seasons

### Results
- **$1.2 Million**
  - Annualized ROI
- **12,000+**
  - Monthly Man-Hour Savings

When a new student applies to attend school at this online education company, the parent is required to submit many different documents to verify and set up their student. All of the information submitted in the application needs to be processed and approved by the enrollment department before the student is notified of their acceptance and is set to begin their online education for the upcoming school year. In this Machine Learning, Computer Vision, and RPA hybrid solution, bots receive and filter incoming documents and are used to merge multiple PDFs. The bot is also able to recognize whether the application form is complete and all the required documents and attached images submitted are correct and up to each school system's standards. If the images do not meet the standards, the bot is able to adjust images for skew, rotation, and can crop out any background found in the document images to ensure each submission meets the accepted criteria. Once all images and documents are formatted accordingly, the decision to accept or reject the application is sent to the enrollment manager to notify the student and their respective school of internal application approval.

*The Solution Results from this process were calculated based on the number of FTE's and PTE's assigned to the original process.*
Check Void Processing

**Business Goals**

- Increase Efficiency
- Reduce Banking Errors
- Keep Accounting System Up to Date
- Accommodate for Increased Volume During Peak Seasons

**Results**

14,000+
Checks Voided Monthly

89.2%
Monthly Man-Hour Savings

The Accounting Department for a Major Global Law Firm is responsible for stacks of unused checks that need to be voided in an internal accounting system. This process is a year-round task that fluctuates in volume and on average requires the finance team to void tens of thousands of checks monthly. In order to automate this process in its entirety, a data feed from the Law Firm’s bank was used to look up the check status, which would later be used to determine whether or not the check needed to be voided by the bot. This process involves an automation that scan checks using OCR, looks up the check status of outstanding or unpaid, fills out the information in the accounting system, voids the check, creates a report, and ensures the data sensitivity of the check information.

The Solution Results from this process were calculated based on the number of FTE’s and PTE’s assigned to the original process.
Payroll and Transactional Queue Automation

Business Goals

- Increase Efficiency
- Reduce Cycle Time
- Eliminate Wasted Time During Report Printing
- Improve Payroll Speed

Results

| 2,000+ Payrolls Processed Monthly | 80% Reduction in Manual Labor |

The Shared Services division at a large manufacturing company is responsible for overseeing the payout of wages and salaries to employees across a number of different plants and locations both inside and outside of the United States. The Shared Services department currently uses the web-service UltiPro to process and generate payrolls for their different locations and pay groups. This process used to be lengthy and highly repetitive as it consumed a majority of each pay-date to enter data and wait for reports to generate across the various pay groups. To automate this task entirely, a Payroll Bot and a Transactional Queue Bot were implemented. The Transactional Queue Bot starts the jobs in the automation orchestrator using a system that is activated by emails containing bot commands. The Payroll Bot then takes over once receiving the start command from the Queue Bot, gathers data from the internal UltiPro system, generates timeclock files, creates a payroll report and sends it to the appropriate payroll handler, then repeats this process until all employee payrolls were accounted for and filed accordingly.

The Solution Results from this process were calculated based on the number of FTE's and PTE's assigned to the original process.
OCR Invoice Processing

Business Goals

- Increase Efficiency
- Increase Invoice Processing Speed
- Improve Customer Service Speed

Results

6,000+ Invoices Processed Monthly

180+ Monthly Man-Hour Savings

The Accounts Payable Department at a major manufacturing company is responsible for locating and uploading all incoming invoices into the company’s SAP system. This process was originally extremely manual and consumed up to 75% of the AP team’s day during peak times. The Accounts Payable Department is held responsible for the accuracy and efficiency of locating invoice emails and uploading more than 200 received invoices into SAP daily. At this volume, the AP team was struggling to keep up with the fluctuating number of invoices, especially as vendors order more items during certain months of the year and often place orders that need to be completed quickly. To automate this process in its entirety and fully optimize the results, Optical Character Recognition (OCR) was integrated within the automation to read PDF invoices and enter the data accurately into SAP. The Bot Sorts through emails, locates invoices, reads them to find PO numbers and other critical information, sorts the invoices into 4 specific categories based on the type of invoice, logs the work, and emails a report to the Accounts Payable Department for approval and auditing purposes.

The Solution Results from this process were calculated based on the number of FTE’s and PTE’s assigned to the original process.
Interested in More Accelirate RPA, AI, and Machine Learning Case Studies?

Email: info@accelirate.com or Call: 212-242-3482