

The Xeretec logo consists of a red diamond shape. Inside the diamond, the word "Xeretec" is written in white, sans-serif font.

Xeretec

IT Works

| THE INTELLIGENT AUTOMATION IDEAS HANDBOOK

Automate critical tasks & free up your workforce

| CONTENTS

Introduction	1
Intelligent automation to the rescue	1
FINANCE AND ADMINISTRATION	2
The industry today and what IA can deliver	2
Perfect for:	2
Positive Outcomes Overview	3
Use Cases	4
HUMAN RESOURCES	5
The industry today and what IA can deliver	5
Perfect for	5
Positive Outcomes	6
Use Cases	7
SALES AND MARKETING	8
The industry today and what IA can deliver	8
Perfect for	8
Positive Outcomes	9
Use Cases	10
IT, SERVICE & OPERATION	11
The industry today and what IA can deliver	11
Perfect for:	11
Positive Outcomes	12
Use Cases	13



THE INTELLIGENT AUTOMATION IDEAS HANDBOOK INTRODUCTION

The world is changing and is not always predictable and sometimes the unexpected happens. In today's world we see pressures to reduce costs and deliver better return on investment. There is a demand to do more for less and find new ways to work smarter and faster. We need to be mindful of the constantly evolving and ever increasingly sophisticated cyber security threat vector. And we want to deliver a better staff, IT and customer experience whilst being kinder to our environment.

WHAT ARE YOUR BUSINESS PRIORITIES?

We can help you realise the power automation: whilst reading this guide We ask you to highlight your main business priorities and think about how these could be automated. We can then work through these priority processes and provide you with a free assessment



**STAFF
SATISFACTION**



**LINK CLOUD &
LEGACY SYSTEMS**



**INTRODUCE IA
CHAT BOTS**



**IMPROVE CUSTOMER
SERVICE LEVELS**

INTELLIGENT AUTOMATION TO THE RESCUE

Wherever a person interacts with systems, processes, and data, via a computer, the chances are it can be fully or partially automated. That means repetitive, mundane yet vitally important tasks can be performed in place of a human. All we do is ensure the human interactions wherever they may be, are recreated with a "bot". It doesn't matter if this is accessing web-based info, extracting data from paper documents, checking ID credentials, going into multiple, disparate systems and then acting as the interface to move things along – if a human can do it, we can automate it.

So, 24 x 7 x 365 automation, no mistakes, releasing staff for higher value work, creating huge efficiencies, and no need to upgrade systems because they don't integrate with each other... because now they can.

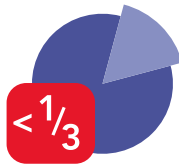
This 'Cookbook' has been put together to provide some ideas for you to consider. We hope it gives you some inspiration.

FINANCE & ADMINISTRATION THE INDUSTRY TODAY AND WHAT IA CAN DELIVER

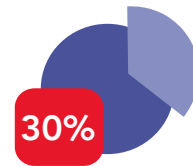


**25,000
HOURS OF
REWORK**

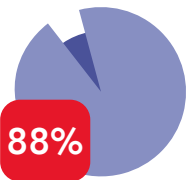
Finance departments (of 40 people in Corporates) can save their teams from 25,000 hours of avoidable rework caused by human errors by deploying robotic process automation (RPA) in their financial reporting processes, according to Gartner, Inc.



Currently, fewer than one-third of finance departments that have deployed RPA have utilized the technology for financial reporting, leaving major efficiency gains on the table.



Gartner research has found that the average amount of avoidable rework in accounting departments can take up to 30% of a full-time employee's overall time.



88% of corporate controllers expect to implement RPA by next year (Gartner)



**38%
MANAGERS
REPORT
COMPLIANCE
IMPROVEMENTS**

38% of managers report compliance improvements are the leading benefit of RPA and it is followed by improved productivity/performance (27%) (NICE)



**70%
FINANCE
PROCESSES
READY TO BE
AUTOMATED**

Close to 70% of Finance Processes are ready to be automated (McKinsey)

PERFECT FOR

- > Invoice Processing
- > Treasury Operations
- > Financial Reconciliations
- > Cash Flow improvement
- > Producing financial reports
- > Eliminating manual errors
- > Removing repetitive tasks and re keying between incompatible systems or processes
- > Extending hours to 24x7x365

SEE IT IN ACTION

To find out more and to arrange a free demonstration of how IA could help your organisation, please contact us at marketing@xeretec.co.uk



XERETEC IA **POSITIVE OUTCOMES FOR** **FINANCE & ADMINISTRATION**



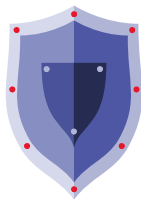
STRENGTHEN GOVERNANCE

Ensure regulatory compliance, automate manual controls, and tighten governance of financial processes.



ACCELERATE THE FINANCIAL CLOSE

RPA delivers financial data on demand, supporting external reporting and business decision making.



CREATE BUSINESS RESILIENCE

Adapt to change by eliminating repetitive, manual, document- and data-intensive tasks.



REDUCE COSTS

Automate manual processes and data validation checks to improve the efficiency of financial operations.



IMPROVE CASH FLOW

Streamline the accounts payable and accounts receivable functions by automating invoicing and reconciliation tasks.



IMPROVE ACCURACY

Eliminate processing errors with Robotic Process Automation (RPA) and Artificial Intelligence (AI).

FINANCE & ADMINISTRATION USE CASES

XERETEC DEPLOYMENTS



CURRIE SOLUTIONS

Automation creates the sales invoices for any specified period for successful deliveries

EMERALD FREIGHT

Automation runs creditor reports, internal monthly reports, and processes supplier invoices into multiple Finance systems

PORTWEST

Automation processes Chinese Supplier Invoices, extracting 16 field entries using AI and confirming to Finance team the account details are correct and can be authorised for payment

OTHER EXAMPLES



QUAD/GRAPHICS

- > Faster and simplified invoicing
- > Collection time reduced and increased cashflow by \$10m per day
- > Used to have to produce 10 billing reports for each job to be invoiced
- > This is now totally automated at night
- > Team just creates invoices



JUNIPER NETWORKS

- > Invoice matching and Processing and cash collection
- > Automate invoice upload to customer portal when order is placed.
- > Matches order no, item, qty, price, tax and eliminated intensive, high-volume error prone manual tasks
- > 50% reduction in process cycle time
- > 33% reduction in manual labour
- > 24/7 billing capacity
- > Reduced TAT to submit invoices by 2 days - Ave Late days down 2 days, lower invoice disputes



AUSTRALIA POST

- > Account processing and maintenance
- > 15% cost reduction in accounting services
- > 18,000 hours saved annually



HOLOGIC

- > Cash collection on smaller but more numerous debts
- > Collected 92% of outstanding small account balances in 1 week
- > People focus on big balances first - bot created to look at smaller debts, send automated "human" email, then follow up if no response
- > People get involved if the first process yields no result

HUMAN RESOURCES THE INDUSTRY TODAY AND WHAT IA CAN DELIVER

72%



A recent study of 1,000 HR professionals found that 72% believed a lack of automation was hindering their organisations' success¹.

76%



More than three-quarters (76%) of HR leaders say onboarding practices are not working well at their organisation¹

39%



39% say they do not have the right technology to reduce administrative error, ensure consistency, and improve accountability¹

36%



More than one-third (36%) blame insufficient technology for their inability to automate and better organize onboarding programs¹

**1
IN
3**



One in three HR managers plan to increase their investment in onboarding software¹

93%



93% of HR talent professionals say that creating a positive hiring journey is critical to attracting and retaining top talent²

80%



80% have plans to improve that experience²

63%



63% plan to implement new recruitment process tools, guides, and information²

PERFECT FOR

EMPLOYEE ONBOARDING

streamline hiring and onboarding by automating manual tasks to create a seamless candidate experience:

- > New user form requests
- > Employee provisioning
- > IT Equipment Set up
- > Software licence allocation
- > Profile in HR Systems and org charts
- > Security Passes & photos
- > Training scheduling

DATA MANAGEMENT AND COMPLIANCE

- > Holiday request management
- > Payroll
- > Employee Health & Safety
- > KPI and performance management
- > Promotions, management changes and pay awards
- > Access (FOCUS) – compliance and risk

BENEFITS ADMINISTRATION

- > Stock options
- > Health Care
- > Long Service Awards
- > Enrolment Management

XERETEC IA POSITIVE OUTCOMES FOR HUMAN RESOURCES



STREAMLINE HIRING AND ONBOARDING

Automate manual tasks to create a seamless candidate experience



IMPROVE EMPLOYEE ENGAGEMENT

Intelligent automation allows HR to improve the employee experience from Day 1.



LEAPFROG LEGACY SYSTEMS

RPA bots can access any application to collect, reconcile, and update data across all systems.



GET STRATEGIC

RPA gives HR time to advance strategic objectives, like talent development and succession planning.



REDUCE ERRORS AND ENSURE COMPLIANCE

Deploy RPA bots to process data with 100% accuracy and generate audit logs automatically.



VALIDATE HR DECISIONS WITH ANALYTICS

Intelligent automation surfaces data and predictive analysis to support a dynamic corporate strategy.

HUMAN RESOURCES USE CASES

EXAMPLE DEPLOYMENTS



DELL

- > 85% HR productivity increase
- > Open requisition recruiter assignments
- > Offer status management
- > Onboarding progress reminders
- > Concur expense error reports
- > Talent Acquisition (TA) Leadership Team Reporting
- > Learning and Development reports and communications
- > Quarterly Performance and Compensation Review (PCR) letters
- > Employee travel invitation letters
- > Job reference letters

NGA HUMAN RESOURCES

- > 13,000 hours saved per year by automating 23 HR processes
- > Administers rewards to over 3 million employees in more than 100 countries
- > User termination automated to remove access to 45 – 60 systems
- > Global Access Management – onboarding new users, changes
- > Password resets to systems

GLOBAL BANK

- > Saves \$1M in onboarding costs and 70% of the time spent
- > 189 member countries served with 120 global locations, with over 10,000 employees
- > Automated processing of hundreds of HR Onboarding Forms
- > 91% of forms untouched by manual intervention post deployment
- > Previously 5 dedicated staff manually tracked, sorted, filed, validated and entered data
- > Many languages, many regional variations

1. Source: <https://www.businesswire.com/news/home/20180116005484/en/HR%E2%80%99s-Big-Challenge-2018-Fix-New-Hire>

2. Source: <https://content.randstadsourceight.com/2020-talent-trends-report>

SALES & MARKETING THE INDUSTRY TODAY AND WHAT IA CAN DELIVER

70%



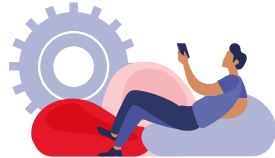
70% of organisations say that RPA releases employees from mundane tasks and helps them focus on more strategic and creative tasks (Forrester - "Harness RPA To Optimize Customer Outcomes" report)

80%



Admin and paperwork processing tasks can be reduced for Sales and Marketing - as many as 80% of standard, rules-based processes can be automated using robots freeing up time to focus on business generation.

10-20%



Increase your Sales & Marketing resource impact by 10 – 20% - Approximately 10% to 20% of human work hours are spent on dull, repetitive computer tasks (Software Testing and Big Data Hadoop)

32X

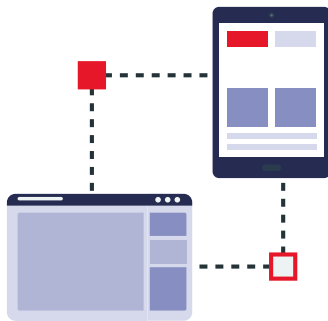


32x faster process time. An automated process with RPA can be 32 times faster than doing it manually and operates 24 x 7 x 365. This means 1 bot could perform the admin work of 640 people per 24 hours (assume 20% of day on admin tasks = 90 mins, 80% performed by RPA = 72 mins. Bot would take 2.25 mins to do the same job at 32 times the pace. 1440 mins per 24 hours - 2.25 = 640 FTE effort).

PERFECT FOR

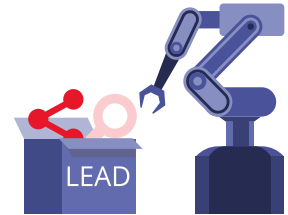
- > Lead filtering
- > Updating CRM with accurate address details, credit reports, Companies House info and contact listings
- > Mapping LinkedIn contacts and Companies House Directors to CRM records
- > Tracking Twitter and LinkedIn Posts from orgs and mapping them to CRM with notifications
- > Building target databases from Google web resources
- > Researching prospects
- > Creating quotations
- > Retrieving data from multiple application from a single screen
- > Management approvals
- > Pricing updates
- > Cross functional reports
- > Consumer insights across multiple channels and data sources
- > Automate integrated marketing campaigns by routing leads, tracking sales triggers, managing campaigns
- > Nurture Customer and prospect journeys
- > Monitor inboxes and filter for keywords then action (e.g. Opt-outs, requests, leads, complaints, etc)
- > Quote expiration notification triggers to all parties
- > Funnel reporting
- > Account follow up reminders
- > Single source for customer data across disparate systems
- > Contract expiration reminders
- > Customer credit reports
- > Customer issue escalation

XERETEC IA **POSITIVE OUTCOMES FOR** **SALES & MARKETING**



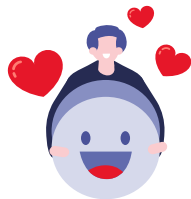
ALIGN CUSTOMER DATA ACROSS SYSTEMS

Use RPA to easily automate integrating all customer and third-party data across multiple systems including Companies House, Credit Agencies, LinkedIn and others. Also assist in migrating processes and data from older legacy systems to new ones



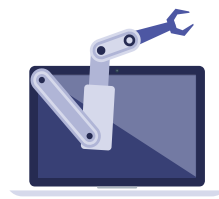
SHORTEN SALES CYCLES

Accelerate lead assignment to close by automating everything from customer research, to quote creation, to legal paperwork.



INCREASE CUSTOMER ENGAGEMENT

Integrate multi-source data for greater marketing campaign accuracy and more tailored sales interactions.



INCREASE SALES TEAM PRODUCTIVITY

Automate administrative tasks and empower Sales reps with time to sell and grow customer relationships.



IMPROVE PIPELINE PERFORMANCE

Ensure leads are qualified and nurtured correctly and consistently to increase conversions..



STREAMLINE SALES AND MARKETING REPORTING

Use RPA bots to aggregate data from multiple sources into a single view for greater insight.



RESPOND FASTER TO ENQUIRIES AND LEADS

Have RPA monitor response email inboxes, check content, search for keywords, extract data and process information instantly 24 x 7, including offering automated responses and actions

SALES & MARKETING USE CASES

XERETEC DEPLOYMENTS



JARDINE MOTORS GROUP

Automation confirms the clients GDPR preferences are stored correctly within the CRM system

TOTAL PRODUCE

Automation downloads order from an email inbox and enters order data into Order Management System

OTHER EXAMPLES



SYMANTEC

- > 20% increase in auto booking of renewals
- > 4,500 hours saved in 12 months
- > Order management system automated
- > across different systems
- > Notifications of orders being processed automated for customers
- > Renewals quotes auto processed and batched

IT SERVICES & OPERATIONS THE INDUSTRY TODAY AND WHAT IA CAN DELIVER

50%



Typically, 30% increase in Productivity in a Shared Services environment post RPA deployments with up to 50% increase extra work capacity for same number of staff

22%



One organisation estimated that password resets accounted for 22% of their total service desk ticket volume. Specially, that was 46,000 calls per year that had been handled manually—at a cost of \$22 per contact! Automating resets avoided around \$1 million in costs for the service desk.

45-90



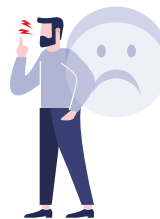
According to a 2020 survey the average frequency of technology issues / employee / week according to IT was 2, with each one lasting 28 minutes. Only 55% of incidents were reported according to the users polled. This equates to lost productivity of between 45 and 90 hours per user per year based on this data, or 6 to 12 working days per annum.

80%



Businesses spend \$1.3 trillion on 265 billion customer service calls each year. Chatbots can help businesses save on customer service costs by speeding up response times, freeing up agents for more challenging work, and answering up to 80% of routine questions. (source IBM)

91%



91 percent of unsatisfied customers will not return for a repeat purchase or service (Chatbot Magazine - Can Chatbots Help Reduce Customer Service Costs by 30%? | by Maruti Techlabs | Chatbots Magazine)

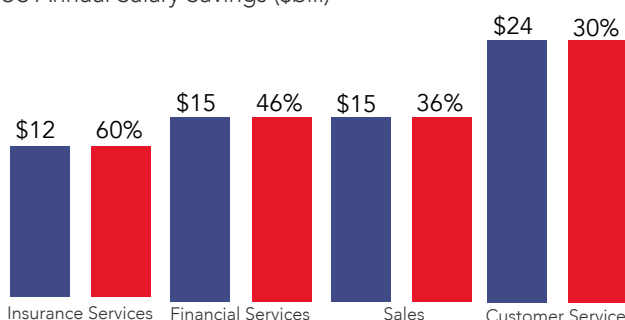
30%+



Chatbots can save between 30 – 60% in salary costs in different sectors (Source: BI Intelligence, The Chatbots Explainer)

POTENTIAL COST SAVINGS

US Annual Salary Savings (\$bill)



PERFECT FOR

- > Opening and closing of accounts
- > New application processing
- > Web based customer self-service options
- > Password resets
- > Ticketing
- > Data Entry
- > Remote diagnostics
- > Contact Centre Experiences
- > Data Migration
- > Medical record and Data

XERETEC IA **POSITIVE OUTCOMES FOR IT** **SERVICES AND OPERATIONS**



DIFFERENTIATED CUSTOMER EXPERIENCE

Create a differentiated customer experience. Attended RPA enables agents and bots to work side-by-side resulting in lower processing times and higher quality client care.



INCREASE EMPLOYEE PRODUCTIVITY

Automate all time-consuming manual or critical processes to allow agents to focus on the customer interaction at hand.



IMPROVE KPI'S

Digital workers streamline operations to reduce average handle time, improve customer satisfaction, and increase first call resolution.



REDUCE AVERAGE HANDLE TIME (AHT)

RPA bots simplify workflows by navigating between multiple applications and departments to service each request.



EMPOWER REMOTE WORK

Intelligent bots can work from anywhere, deliver remote agents just required data in a single screen, and ensure adherence to process guidelines.



ENSURE BUSINESS CONTINUITY

RPA creates more resilient business processes and solves capacity planning problems without major infrastructure investments or downtime.



SPEED UP ONBOARDING AND TRAINING

Leverage automation to quickly process requests and applications, onboard new customers

IT SERVICES AND OPERATIONS USE CASES

EXAMPLES

Deloitte.

DELOITTE LP

- > Automated claims processes (13 with 8 bots)
- > Handles 1.5 million requests per year
- > Performs the equivalent capacity of an additional 200 full-time staff
- > Delivers 100% accuracy 24 x 7 x 365 at a 70% lower cost



UNIVERSITY OF MELBOURNE

- > Automated Student Admissions Services and data entry
- > Saved 10,000 man-hours annually
- > Reduced duplication and delays
- > Allowed volume growth and applications and improved customer experience
- > Alleviated an over-whelmed back-end approval process involving manual data entry

Walmart*

WALMART

- > Answering employee questions
- > Retrieving useful information from audit documents



AMERICAN EXPRESS GLOBAL BUSINESS TRAVEL

- > Automate airline ticket cancellations and refund issuing
- > Facilitate rebook recommendations in the event of airport shutdown

tricolor

TRICOR

- > Deployed RPA for their new Global Shared Service Centre in Malaysia, pre Pandemic
- > Saw a 30% Productivity improvement
- > Gained the ability to handle an additional 50% extra work for the same number of staff



XERETEC **ABOUT US**

We have a 30-year history of delivering contract and lifecycle services for customers that range from Global Household brands across the World to family run businesses in the local community. Our focus is on delivering a complete technology experience designed to provide tangible business benefits, no matter how big or small you are.

Our selection process handpicks a range of solutions and service options in addition to offering off the shelf technology products. We provide bespoke solutions addressing digital workspace and communications, through to process automation.

WANT TO LEARN MORE? **GET IN TOUCH**

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