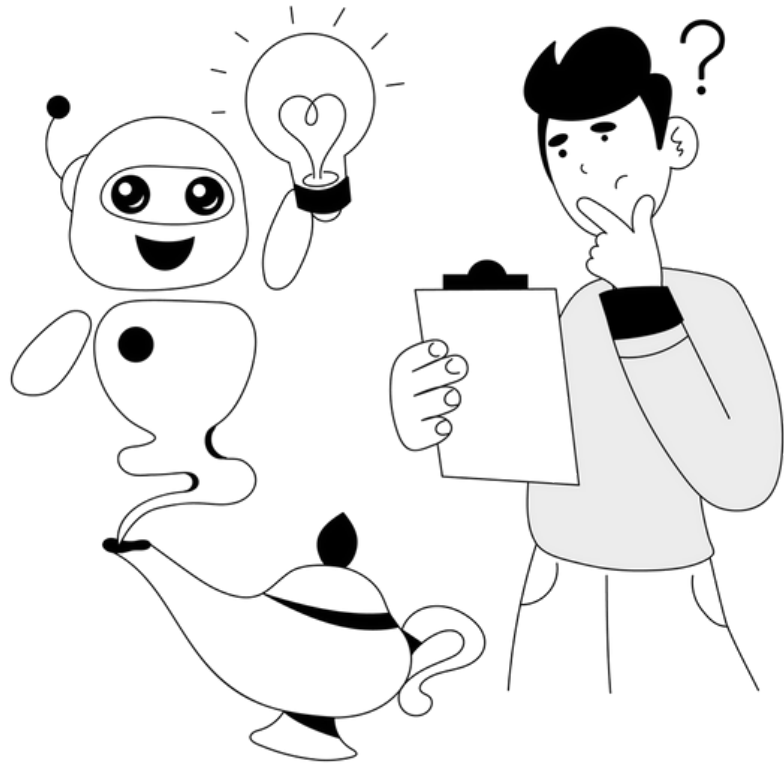A Non-Profit Financial Institution Recalibrated **Operational Efficiency** and **Customer Experience** with **RPA**

A Robotic Process Automation Case Study

A U.S. cooperative society wanted to automate day-to-day repetitive and labor-intensive operational tasks, through the implementation of Robotic Process Automation.

The main goal of the organization was to replace human hands with robotic automation to reduce manual efforts and to scale up customer experience through more human interactions with customers.

Meet Our Customer

A U.S based credit union, with around 74000 account bearers and nearly 500 workforce continues to be successful in the finance industries for more than 75 years. Pursuing to provide affordable loan rates, competitive savings rates, and services to meet the unique needs of the membership. Apart from rendering financial services, they take part in charities, sponsorships, volunteerism, and much more.

Problem Statement

With the expansion of financial services, the organization aimed to elevate the customer experience by more human interaction to provide custom solutions and services. To achieve that goal, the employees behind the operational desk should be freed from tiring, repetitive, and mundane day-to-day tasks.

The following were the prime concerns of the client:

Dependency on manual efforts

Recurrent human errors

Risks associated with bill payments

Time consumption in completing repetitive tasks

The client realized that with digital automation, they can overcome current hindrances in achieving their goal of giving exceptional customer experience. That is where they reached Zuci Systems to seek expertise in creating automation strategies to cover possible use case scenarios backed up by a dedicated RPA team.
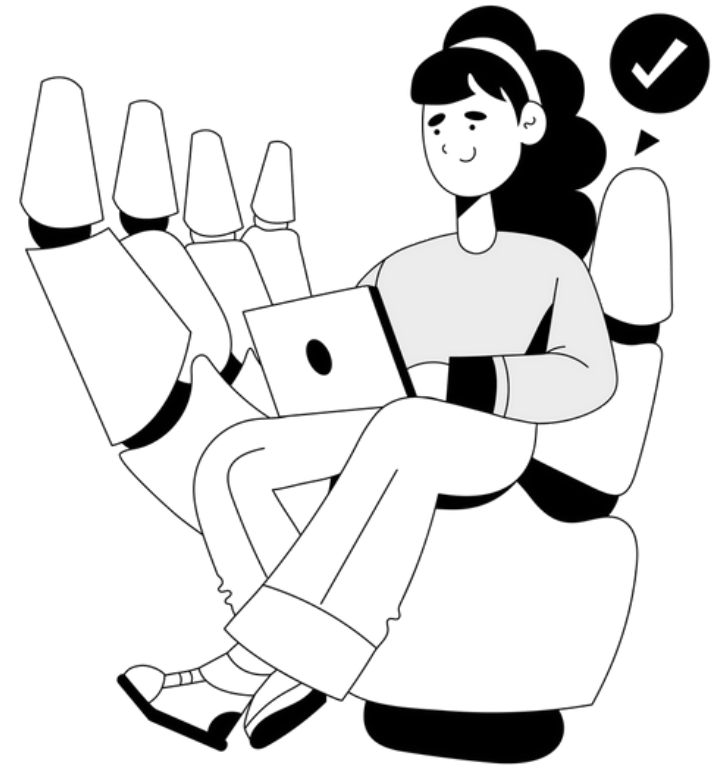
01 Effective reduction of time spent on manually handled tasks.

02 Automate daily reports delivery to staff before official hours.

Business Goals

03 Reduce the risks associated with bill payments.

04 Bring down human errors to zero.

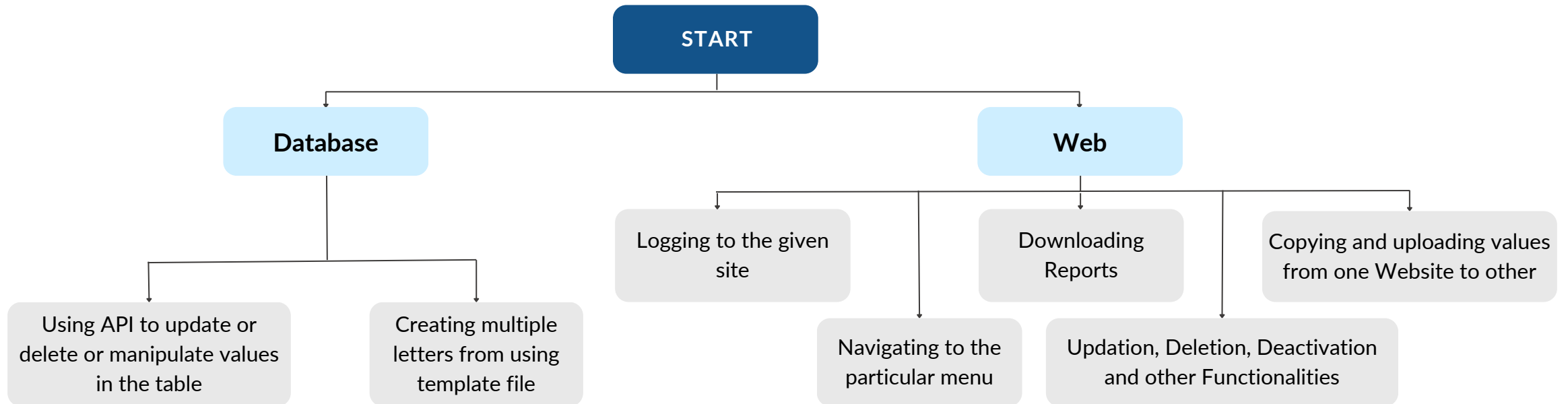| USE CASES	DEPARTMENT	BUSINESS OBJECTIVE
Closed membership account deactivation	Operations	To deactivate the closed membership accounts on a third-party vendor site to avoid recurring payments and charges paid by the client for that member.
Payment Services -Fraud Report and Dispute Report	Payment Services	To download Fraud and dispute PC reports from a third-party website and place them in the given folder path after applying the required filters.
Creation of member data	Operations	To create new member's data using API based on the details received from the vendor.
Creation of dispute form	Operations	To gather data from the card management portal for creating dispute form and proceed to submit the request through a separate service portal for additional processing.
Update existing account details	Operations	Removal of old account details and addition of new account details for every person profile given.

How Zuci Systems Helped?

- A dedicated team of engineers assigned to understand and analyze the step-by-step existing process in detail.
- Zuci's Team assessed the identified use cases based on rule-based nature, repetitive tasks, and volume of transactions.
- Came up with the best-fitting RPA framework where each use case was processed through an automation process using the UiPath RPA tool.

RPA Automation using Database and Website Application

```
                              ┌─────────────┐
                              │    START    │
                              └─────────────┘
                    ┌──────────────┴──────────────┐
            ┌───────────────┐              ┌───────────────┐
            │   Database    │              │      Web      │
            └───────────────┘              └───────────────┘
```

START

Database

Web

Logging to the given site

Downloading Reports

Copying and uploading values from one Website to other

Using API to update or delete or manipulate values in the table

Creating multiple letters from using template file

Navigating to the particular menu

Updation, Deletion, Deactivation and other Functionalities

- Using Azure DevOps, maintained separate repositories for each use case to access UiPath code.
- As part of the post-implementation process verified the attainment of intended objectives, including the reduction of manual effort and the effective management of errors.

Quantifiable Outcomes

0

Human errors

40%

time saved daily through automated account deactivation

25%

time saved daily through automated member upgradation

21%

time saved daily through automated generation of fraud and dispute reports

Tech Stack

Why wait? Reach out to our RPA experts and uncover the untapped automation opportunities within your processes.

30-min free consultation →

USA & Canada

Texas
+1 (469) 320-1156

Toronto
+1 (343) 309-5455

Europe

Belgium & Geneva
+32 477411912

India

Chennai
+91 (44) 69178900

✉ sales@zucisystems.com

🌐 www.zucisystems.com