

AUTOMATION POTENTIAL IN: CUSTOMER SET UP AND CONTRACTS



Onboarding a new customer is your first opportunity to make a good impression. When customers interact with you they don't want manual processes, tedious paperwork, and lengthy approval times. Powering a customer onboarding process that is digital in nature, quick, 24/7 available are a few things that make up the beginning of a successful relationship with your customers.

Create and update customer master data: Recent regulation has highlighted the need and value of an up-to-date customer data base but also the time and effort involved in upkeep. Robotic Process Automation is a particularly useful tool in onboarding, as it can work with disparate systems to gather information and match them against predefined criteria. Where key information is missing/incorrect then this can be instantly be notified to your team. Automation can also be used to verify that current information is accurate or keep an eye on key contacts. For example in B2B a bot could also check customers' linkedin profile, see if they have moved onto a new opportunity and then update the CRM. This can ensure you never lose business because your key contact has moved on.

Create standard reports: Where customer data is needed for reporting purposes it may often be combined with data from sales, order processing or other. This is another area where RPA can go into different systems or files, extract information and then populate a dashboard or similar. The advantage with a bot doing this is the speed and availability allow you to have live data 24/7.

In terms of processes where Proservartner see a medium potential for automation:

Review and accept customer applications: This processes could be automated but its very dependent on the complexity of the information needed for approval. If there were a series of basic if/then questions that could be applied to an application then its possible a bot could handle this process, but where several factors have different weights this may not be possible.

Manage terms and conditions: Where a certain product/service has a standard set of terms and conditions it may be possible to have a bot customise these to suit the name, address etc of the end client. Where terms and conditions are of a more bespoke nature, this makes it more likely you'll need manual oversight.

Processes such as managing terms and conditions and negotiating price have a low potential for automation as the level of thought required simply cannot be achieved by software at this point.