

CASE STUDY

RPA in customer onboarding

Leading fintech company

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CLIENT

The company represents the fintech industry and operates in the area of e-commerce. It is a global brand growing by 30% every year. It is most often identified with online payments, thanks to which it has gained widespread recognition.

NEED

Our task was to design and implement a robot that will support the work of a team dealing with the onboarding of new customers (merchants) from the SMB (small and medium-sized business) area in Poland – companies cooperating with our customer.

SOLUTION

We developed a robot work diagram. The robot analyzes the provided data and works in the system instead of a human. . The robot recognizes different cases and selects the appropriate implementation path, which broadens the spectrum of its operation. It's also provided with an error reporting system.

We chose the UiPath platform, our partner in the area of the RPA, to conduct the process. The case handling process takes place in Salesforce Service Cloud.

BENEFITS

- The real saving achieved by the robot is 80 hours per month.
- The benefit of implementing the robot can be seen in the number of processes. Formerly, eight people were assigned to the automated process. Now, these people support as many as 19 processes.
- The robot performs a task corresponding to human involvement at the level of about 0.5 FTE