LEAPWORK

Software Provider unlocks RPA for improved customer experience

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>
> **Henry Berg, Process Automation Manager**

A million B2B users rely on this vendor's software solutions and services for functions within HR, payroll, accounting, and more.

Henry Berg was tasked with finding a way to do things smarter in various areas of the business and LEAPWORK offered the best solution.

So far, Henry and the team implemented RPA in three key processes: **The unlocking of new online customer accounts**, **the verification of employees' travel expense reports**, and **the sending of reports to authorities in relation to the vendor's salary services**.

BETTER CUSTOMER ON-BOARDING

Previously, when online customers created a new account for a service, they would sometimes have difficulties accessing their account [...]

<1
First automation case built in less than a month

2x
Time freed up for payroll staff

↑
Customer uptake and satisfaction increased

For competitive reasons, the client has decided to participate anonymously in this story. Should you decide to go through the sales cycle with LEAPWORK, we are able to provide a reference call.

right away. In some cases, this unintentional exclusion could last up to hours as the issue required manual unlocking done by a person at the vendor's service desk. In fact, it was standard procedure that this person would spend a few minutes every morning unlocking recently created accounts.

Henry and his team used the LEAPWORK Automation Platform for building a flow that instantly takes care of this task. Meaning that the've successfully eliminated this issue.

The software provider has a steady stream of new customers coming in, so it's critical to the business that there are no bottlenecks in the customer on-boarding. It is an important process that, when handled manually by just one person, makes the whole system very vulnerable.

"*If the person responsible was out sick for example, there was no back-up for handling this task,*" Henry said. "*Now, we have improved the on-boarding process and definitely increased customer satisfaction.*"

Another process that Henry and his team has automated using LEAPWORK is the handling of employees' travel expense reimbursement. This was a very tedious and time-consuming task. Dates and money amounts in the expense reports must be verified to match the dates and amounts in corresponding receipts. One person in the payroll department was responsible for this task.

   By scanning employees' expense receipts, the automation flow built in LEAPWORK takes care of the verification and reports any discrepancies. The automation case has freed up half a year in work hours, and the payroll specialist can now spend her time more productively and focus on other pressing tasks.

We have now completely eliminated the issue of clients experiencing being locked out from their account.

Henry Berg, Process Automation Manager

THE PERFECT MATCH

There were at least two reasons why the LEAPWORK Automation Platform was the right tool for the automation team: user-friendliness and virtual desktop automation capabilities.

The intuitiveness of LEAPWORK made it possible for Henry and the team to build their first automation case, the verification of travel expense reports, within their first four weeks of trying out LEAPWORK.

When it came to the automated customer on-boarding, it was imperative that LEAPWORK could handle Citrix applications.

"*LEAPWORK was the only tool we tried that solved the Citrix automation without errors,*" Henry said.

At this point, Henry is looking into other processes in the organization that can be automated, specifically any tasks that involve manual verification. When asked about the potential for further automation in the company, Henry laughed and said: "*It's enormous!*"