



Building a sustainable, scalable intelligent automation program for a North American credit union

INDUSTRY Financial Services
OPERATING Canadian Market
COMPANY SIZE 2,000
FUNCTIONS Customer Assist, Communication and Collaboration

IA TOOLS USED



“Reveal Group gave us the training and mentoring needed to help stand-up our RPA capabilities. We are extremely happy with the mentoring experience.”

- HEAD OF AUTOMATION

60%

reduced processing time to improve SLAs for bill payment tracking

5K

annual hours given back to the Customer Success team

8

week project delivery

90%

reduced processing time for automated settlement entries

Piloting Their First Program

A medium-sized North American financial organization needed to significantly improve process efficiency and productivity, reduce risk, and enhance member experience through quality service. The client had clear expectations and goals, which became critical to this engagement.

Their wish list included the following:

- A well-trained Center of Excellence (CoE)
- A sustainable, scalable RPA program
- Automating a process to relieve a relatable pain point across several departments

Turning to Reveal Group for their track record in piloting automation programs, they partnered through their inaugural RPA deliveries, from process identification to deployment, to ensure a sustainable program with proper oversight and daily digital workforce management.

Reveal Group's Approach

The first step was to tailor an Intelligent Automation operating model or Blueprint for Scale, that defines the strategy and outlines roles, organizational design, and governance practices. As part of the 8-week project, Reveal Group assisted the client in piloting RPA and helping them define a Center of Excellence (CoE). Reveal Group's platform architects supported installing Blue Prism while our highly skilled RPA developers designed, built, tested, and deployed production-grade automation.

A critical part of piloting an RPA program is establishing internal capabilities. Our teams ensured a proper platform set up to avoid any issues down the line, allowing for an opportunity to scale rapidly.

Reveal Group upskilled client employees in their operations and IT team, enabling them to confidently manage and own their automated solutions and guiding them through their first mentored delivery wave. The internal training was so successful that one of the employees, who had no prior experience in technology, became a "Developer of the Year" finalist at the RPA vendor's annual customer award ceremony. Reveal Group's framework and methodologies were governed by the Reveal RoboSuite tools and opened opportunities for the client to scale their automations and replicate them across different business areas. Automations with high usability and a rigorous governance model are essential for program momentum and preparing employees to embrace a digital future.

The Results

The impact these four automations had on the employees was colossal. The financial organization's contact centers and local branches receive numerous requests daily from members. Their operations team was bogged down with manual reporting processes and repetitive tasks. Potential savings and hours back weren't the only benefits to be celebrated. The employees were relieved of administrative pressures and risk of error to focus on better servicing their members.

- Increased employee satisfaction by automating daily report generation
- Enhanced data accuracy and reduced processing time by 60% to improve SLAs for bill payment tracking
- Automated settlement entries and reduced processing time by 90%