

RCI automates customer data updates for its credit and collections group

CASE HIGHLIGHTS

Profiled Organization: Rogers Communications, Inc. (RCI).

Challenge: To make the processes for handling returned mail and updating customer payment profiles more efficient and less costly for the Credit Operations Group.

Solution: Automation Anywhere interacts seamlessly with RCI's CRM product and a plethora of platforms that underlay it to keep the customer database up-to-date.

Benefits: Automation Anywhere has streamlined the processes to the point of saving \$235K per year in operational expenses and improved the quality of the customer database for billing and value-added customer services.

"Automation Anywhere has helped us reduce our operational expenses by about \$235,000 per year."

- George Lirantzis, Operations Planning Manager, RCI Credit Operations

BACKGROUND

Rogers Communications, Inc. (RCI) is Canada's premier communications and media company whose holdings range from wireless voice and data services to cable, high-speed Internet, and telephony, to broadcast, print, specialty, and on-line media. In addition, the 11 billion dollar company is also in the business of retailing wireless and home entertainment products.

Over the past 15 years, the company has grown largely through acquisitions - Sprint Telecomm being one of them—each one bringing with it a new platform and system of doing business. This has proved to be an especially daunting challenge for the Credit Operations group (within Accounts Receivable), which handles all credit and collections functions for the company's nearly eight million customers. How do you consolidate operations across a plethora of platforms and systems so that 700 plus employees in call centers across Canada don't waste their time or lose the goodwill of customers? Manual workarounds were the only option until Operations Planning Manager George Lirantzis discovered Automation Anywhere.

ENTER THE CHANGE AGENT

Lirantzis joined RCI as a project manager—or change agent—responsible for planning, analyzing and implementing change in the processes and procedures of the Credit Operations group. He had a mandate to look at existing business practices and figure out a way to streamline them. Two processes immediately stood out for their lack of efficiency and high cost:

Returned mail handling. Every day Canada Post processes roughly 2300 pieces of returned mail from Rogers Wireless customers and sends an automated file to Credit Operations where, until a few months ago, four full time employees - one permanent staff and three temps - would manually update the customer database.

Payment profile updating. In a typical month, approximately 20,000 accounts are reviewed and taken off the preauthorized payment option because of insufficient funds. Converting these customer accounts to the monthly invoicing option required one permanent and two temporary full time staff.

The bottom line? Seven FTE work hours per week dedicated to performing largely mindless and repetitive tasks that could be handled with more speed and accuracy using automation.

A SOLUTION IN THEIR OWN BACKYARD

At first pass, Lirantzis and his analysts were inclined to hire someone to come up with a custom automation solution. But the sensitive nature of their customer data made it impossible for a third party to fully access the company's databases or do any builds within the system. Custom macros were suggested as an alternative but when the quote came in at \$55K for a couple of processes, Lirantzis and his team decided to look further.

A Web search revealed some possibilities but before they could try out any of the products, they found the solution in their own backyard, so to speak. Someone within the company had purchased a standard version of Automation Anywhere and was using it to run some automated business processes quite successfully within the company's existing systems. In other words, it was compatible with the company's systems. The first hurdle had already been crossed.

But Lirantzis needed to be absolutely sure, so he had the team at Automation Anywhere create some custom demos to run on the RCI systems using information he provided. In 2008, RCI had implemented a CRM product on top of its multiple systems to make them more manageable. The fact that Automation Anywhere could handle the CRM and interact with the backend system made it very attractive indeed and by August 2008, the group was ready to license the Enterprise version.

SPEED, EFFICIENCY & DATA INTEGRITY

Today, when the daily email arrives from Canada Post, the lone person who oversees the operation downloads the file into a database and runs the automated business process. After scrubbing the data for duplicates, the process - which incorporates captured screen shots to mimic the actions of a data entry person - pulls up each account within the CRM product, puts it in interaction mode, then launches the actual application in the background to update the customer record. If the system is slow owing to heavy traffic, the process skips records that take too long and lists them in a report for future updates.

Automation Anywhere has performed seamlessly despite the complex process of accessing each account through the CRM product. Every Monday, analysts run a check to ensure that the process is compatible with any changes done to the CRM over the weekend. Otherwise, it's all pretty much on autopilot.

Best of all, the process of updating customer accounts for both, invalid address and failure of preauthorized payment, is now handled in just one quarter FTE work hours!

"The loop and if/else command are really useful in handling different scenarios. With the loop we could go through a spreadsheet until there were no records to update."

- Shailesh Pranjivan, Senior Business Analyst, RCI

HIGH SCORES FOR CREDIT OPERATIONS

In addition to the huge reduction in operational expenses estimated by Lirantzis—about \$235,000 per year so far—Automation Anywhere has benefited RCI in some unexpected ways:

- The amount of returned mail has declined because records are updated on a daily basis, preventing multiple billings to the wrong address.
- The opportunity to collect on bills has increased because collections personnel are forewarned to get correct addresses from customers.
- Marketing collateral and cross-selling information now gets to the customer in a more timely fashion.

If you found this case study useful, we invite you to discover how Automation Anywhere can give your business an edge – visit www.AutomationAnywhere.com



PRODUCT INFORMATION: AUTOMATION ANYWHERE

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