

ConvergeOne: 'bigger, better, faster, stronger' with Automation 360 cloud



ORGANIZATION PROFILE

ConvergeOne is a proven, services-led cloud solution provider that utilizes its intellectual property and unique methodologies to create value for customers and develop progressive solutions that connect people with purpose. The company is headquartered in Bloomington, Minnesota with 50+ offices across the United States.

CHALLENGE

ConvergeOne began its Robotic Process Automation (RPA) program at the end of 2019. As the company planned out its future roadmap, they wanted to ensure they were using the latest and greatest automation tools available such as Discovery Bot to remove any potential obstacles and make sure there would be no limitations in doing things better and faster.

SOLUTION

Choosing Automation 360™ as its go-forward platform, the company started migrating four processes around managing and closing out daily engineering issue tickets first. The RPA team used Bot Scanner to determine what bots were ready to migrate from Enterprise version 11. The Bot Scanner showed all bots were ready for migration, making the choice to switch to Automation 360 an easy one.

Migrating fully to Automation 360 cloud allowed ConvergeOne to eliminate cloud hosting for Enterprise version 11, saving maintenance effort and hosting costs.

BENEFITS

30,000

Hours saved annually

0

Hosting infrastructure costs

Added

Discovery Bot capabilities

Processes Automated

- Data gathering and item pricing for new and updated contracts
- Extracting CRM information for marketing events
- High priority order updates
- Closing tickets and sending customer invoices
- PO line item receiving

Industry

Technology

"As we're moving into the future, our goal is to be bigger, better, faster, stronger. To be successful, we need to remove any potential limitations and have the latest and greatest tools available to the team. Migrating to Automation 360 cloud opened these doors for us, and now nothing is holding us back."

—Stacy Herrera,
Senior Director of Tools,
Automation & Analytics,
ConvergeOne

STORY DETAILS

For others migrating to Automation 360, the team recommends dedicating an engineer to manage the environments and set up access to simplify the process. In addition to Automation Anywhere documentation and Bot Scanner, the team also made use of A-People forums to help navigate the process and complete migration.

With migration complete, new automations are now being built directly in Automation 360. One new bot created was for the contracts team. It checks three different sources, pulls information from PDFs, and consolidates a report on new, renewed, or updated contracts. Before, it could take up to two weeks for these processes to be completed. Now, a bot completes the work in under four hours, twice weekly.

The RPA team is also working to use Discovery Bot to automate a process for HubSpot, the company's marketing platform. To date they are more than halfway to completion. After events, the list of attendees is checked to see if they are existing or new customers. Bots bridge the disconnect between HubSpot and ConvergeOne's CRM platform, helping to identify who the sales team should reach out to. Being able to follow-up with potential new customers so quickly after an event presents a big potential revenue opportunity.

Currently teams using RPA include Customer Success Center (CSC), marketing, sales, and professional services.

THE FUTURE

ConvergeOne is looking into implementing Automation Anywhere Robotic Interface (AARI™) for two use cases. The first is to help pull information from event IDs in HubSpot. The second is for what is being called a "customer story," or timeline. For this process the team is also planning to deploy Discovery Bot to help integrate different company systems and streamline the collection of data.

The team has also started doing proof of concepts (POCs) with IQ Bot™ and wants to use Bot Insight to track metrics associated with each of its automated processes, such as cost savings.

Before the end of 2021, the company hopes to have 12 processes automated and reach nine additional teams, including finance, which are not using RPA yet.

"I would recommend migrating to the Automation 360 cloud platform. We are now able to use all the new features Automation 360 provides in our automation, increase stakeholder engagement, and reinvest our infrastructure cost savings into more licenses to expand our automation program."

—Harsh Phuloria,
RPA Manager,
ConvergeOne

About Automation Anywhere

Automation Anywhere is a global leader in Robotic Process Automation (RPA), automating business processes with software bots performing repetitive, manual tasks, resulting in productivity gains and improved customer experience. Visit [automationanywhere.com](https://www.automationanywhere.com).

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