

# RPA Bots for Salesforce provides seamless, efficient execution of operations



## ORGANIZATION PROFILE

Technology services leader helping global companies in the legal industry streamline business operations to scale and drive efficiency. This helps drive impactful operational change, scalable execution, and business-wide efficiencies.

## CHALLENGE

The company had many large, global clients and acquisitions. Different processes and practices had to be constantly streamlined to stay ahead of continued data growth. A solution was needed to find a more time and cost-effective way to handle the demanding expectations of a digital world.

## SOLUTION

Using RPA Bots for Salesforce (Salesforce Connector), an intelligent automation solution offered on the Salesforce AppExchange marketplace which allows users to automate tasks using bots from anywhere inside Salesforce, and Automation 360™ on cloud enabled the seamless execution of operational service delivery. Now when a request comes through Salesforce, which is used as a workflow tool, a series of actions engages the integrator and fires off commands to follow Robotic Process Automation (RPA) to accomplish the desired solution.

## BENEFITS

100%

Accuracy

90%

Efficiency increase

### Processes Automated

- Creating client workspace
- Capturing images of native documents

### Industry

Legal

"We're using RPA Bots for Salesforce to help us make smarter decisions on where the work should go—to automation or to the standard queues."

—Senior Manager,  
Operation Engineering

## STORY DETAILS

Prior to automation, every time a client had a new case, the company had to create a new workspace within their platform, as well as complete a variety of associated tasks and QC measures. In addition to the queue the requests sat in, the entire process took about four hours to complete. There was also a high rate of human error when entering information. Processes throughout the industry, and between clients, were not standardized, and profit margins were impacted by significant price compression in digital data processing.

A number of employees in the company had previous experience implementing automation, so a vision to leverage cost-saving automations using Automation 360 and Salesforce Connector was the best solution. Automation increased time efficiency and accuracy in processing client requests. The implementation of RPA also improved work-life quality, garnering a lot of support from employees to continue deploying the technology.

## THE FUTURE

The company plans to continuing scaling its RPA solutions by using Discovery Bot to identify more use cases. It is interested in using RPA in its front office to help employees better engage with requests in a more streamlined way.

"As our business grows, RPA allows us to provide better service with a seamless experience across geographies."

—Program Director

### 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 [www.automationanywhere.com](http://www.automationanywhere.com).

☎ North America: 1-888-484-3535 x1 | International: 1-408-834-7676 x1

📘 [facebook.com/automationanywheresoftware](https://facebook.com/automationanywheresoftware)    🐦 @AutomationAnywh

🌐 [linkedin.com/company/automation-anywhere](https://linkedin.com/company/automation-anywhere)    ✉ [sales@automationanywhere.com](mailto:sales@automationanywhere.com)

Copyright © 2021 Automation Anywhere, Inc. AUTOMATION ANYWHERE, the A-Logo, Automation 360, AARI, A-People, IQ Bot, and Bot Insight are trademarks/service marks or registered trademarks/service marks of Automation Anywhere, Inc. in the United States and other countries. Other product names and parties' marks are for identification purposes only and may be the property of their respective owners.