

RPA **CASE STUDIES**



PRESENTED by **KG HAWES**



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Before RPA






Client wanted to replace their Sonnet monthly subscription model with a one-time expenditure in the form of an RPA. Additionally, they wanted the final RPA to contain enhanced functionality that wasn't available in the Sonnet version.

With RPA

In addition to the new RPA being able to match and exceed the functionality of **Sonnet's Indirect Dispute Model**, it is able to: respond to disputes that Sonnet cannot, prefill in fields for manual resolution, automatically download images, is equipped with Accurint® search, and allows Client access/edit rights to edit any status codes of their choosing, whenever needed. Pre-implementation, Client would have been required to contact Sonnet customer service to perform this task, and then wait for Sonnet to update the list.

Once the RPA bot has processed all of the disputes for the day, results are put into an audit sheet for review as well as for historical record keeping.

BENEFITS

-  Responds to Disputes that Sonnet Cannot
-  Pre-Fill in Fields for Manual Resolution
-  Is a One-Time Expenditure
-  Client-Enabled Edit Access for Response Codes
-  ACCURINT SEARCH® for Identity Verification such as SSN, DOB & Account Number

Before RPA






The Small Claims Department of a collection agency needs to generate claims notices for every suit it intended to file. Each claim has a set of predetermined rules based on the county and court that the suit is filed in, and the client that suit is filed on behalf of. The process was handled manually, often resulting in typographical errors, leading to revenue lost in denied suits.

With RPA

We created a robot and scheduled it to run each morning. It went through the process of generating and editing the documents needed to file a Small Claims suit. We also programmed the robot to:

- Update the accounts in the Client's collection software with the most up to date information for the defendant,
- Notate accounts of the completed claim, and
- Place the suits into the right process queue for further processing.

BENEFITS

-  400% Speed Increase in Volume Produced
-  Savings of 0.5 FTEs
-  100% Accuracy
-  Decreased Costs Due to 100% Accuracy
-  Improved Legal Process Efficiency

Before RPA

Many of our Client's collection agency clients require an automatic notification to be sent out whenever:




- A payment plan is created
- A payment plan is delinquent, and
- An account has been paid in full.

Current software tools were unable to provide this functionality automatically.

With RPA

A robot was created to generate daily documents for each of the above stated scenarios. Robot will then upload the document(s) to their clients' web portal and then alert the client via email that they are ready to view. Robot will then update accounts in Client's collection agency system to reflect notifications sent.

BENEFITS

-  Increased Client Satisfaction
-  Provides an Advantage Over Competitors Existing Abilities
-  100% Accuracy
-  Decreased Costs Due to 100% Accuracy
-  Improves Client-to-Client Communication.



Before RPA







Our Client's legal department updated the e-court system whenever a proof of service was made via digitally submitted (readable) PDFs provided by their process service vendor. Client then made sorting decisions based on the information found within the PDFs. Client would manually copy and paste information from the PDF into the web-based court system. Pre-RPA.

With RPA

Prior to RPA, Client would be able to e-file 80-100 proof of services daily. With RPA, Client can now file 400-500 proof of services daily. Robot will read the PDFs*, make all sorting decisions, extract all of the information needed, enter all the information necessary into the court's e-filing website, and maintain tracking logs of the steps it takes for auditing purposes

* PDFs must be readable, not be flattened.

BENEFITS

-  5-Fold Increase in number of files processed
-  Needed to hire additional employees to keep up with new business created from the automation.
-  Savings of 2.0 FTEs
-  100% Accuracy
-  Decreased Costs Due to 100% Accuracy
-  Improved Legal Process Efficiency







Before RPA

Client satisfies hundreds of judgments a month. The final step in the legal process is to report these satisfied judgments to the respective courts. Client needed to create an automation process that could file judgment satisfactions directly with the courts, along with the corresponding certificate of mailing.

With RPA

Previously, 100 judgment satisfactions may have taken Client approximately 17 hours to do manually (i.e., 10 minutes per satisfaction from start to finish). Client can now effectively manage this process from start to finish for about 200 satisfactions with 3-4 hours. This process is historically not a high priority in the legal work structure because it does not have a definitive timeline; however, automation allows Client to keep up to date with this workload with minimal distraction from other tasks.

BENEFITS

-  100% Accuracy
-  Decreased Costs Due to 100% Accuracy
-  Improved Legal Process Efficiency
-  Savings of 2.0 FTEs
-  Approx. 1,000% Increase in Submissions Per Hour
-  Staff Resources redirected to less redundant tasks








Before RPA

Clerks would spend 2-4 hours a day creating mailing banners that were to be printed and attached to that day's outgoing legal mail. For each letter to be mailed, the clerk would look up the information needed to fill out the mailing form from within their collection agency software, and copy/paste the required information into the mailing-banner creation website

With RPA

Robot now directly queries the needed information from the Client's collection agency system's database, and then inputs and/or update the data into the mailing-banner creation website.

BENEFITS

-  100% Accuracy
-  Decreased Costs Due to 100% Accuracy
-  Improved Legal Process Efficiency
-  Savings of 0.25 to .05 FTEs
-  Frees up clerks to focus attention on more meaningful tasks.



Before RPA

Our Client’s collection agency offers their clients access to a proprietary web portal. Client wanted to provide a quarterly reminder to each of their own clients, notifying them of all users that had access to their web portal. This allowed Client’s clients to remove or adjust critical user access as needed.

While this was simple enough for our Client’s clients to do via the “Users” part of the portal interface, this RPA provided Client this important quarterly reminder that might have otherwise been regularly overlooked.

With RPA

Robot will scan each of our Client’s individual client profiles and then generate a unique email that is sent to each of our Client’s clients’ administrators, notifying them of all the specific users that have access to their portal.

BENEFITS



Improved Security for All Clients



Increases client satisfaction by providing automated accountability of client accounts



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RPA INTRO VIDEO

REQUEST A CONSULTATION

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