Robotic Process Automation Use Cases

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Use our Periodic Table of RPA to learn about possible use cases in your business

Every year, more businesses are using Robotic Process Automation to streamline workflows and free up more of their staff's time. By automating repetitive tasks like data transference and report compilation, people have more time to innovate, collaborate, and think strategically about their projects.

The benefits of RPA are clear. What isn't as clear is how you can apply it to your business.

You may read case studies or news reports about how other businesses have applied RPA, but every company's system architecture is different. What tasks in your company could be automated? And if RPA is so powerful and transformative, where should you apply it inside your organisation?

That's where we come in...

The Periodic Table of RPA

An overview of the tasks and processes Robotic Process Automation could improve in your business

1 Cp Competitive Pricing and Monitoring													55 Ve Credential Verification
2 Du Customer Due Diligence	5 Co Compliance Reporting											52 Sc Screening and Risk Management	56 Lc Licensing and Registrations
3 Cu Customer Data Management	6 Po Sales and Purchase Order Processing	12 Ca New Customer Applications	13 On Online Registrations	14 El New Customer Eligibility	15 Up Upsell Opportunity Reporting	16 We Customer Welcome Packs	17 Rt Customer Retention	36 Sd Supply and Demand Planning	40 Sh Shipment Scheduling and Tracking	44 Om Vendor Onboarding and Maintenance	53 Ip IP and Fraud Detection	57 Ou Outside Affiliations Review	
4 En Customer Engagement Comms	7 Re Refunds and Returns	18 Mi Market Intelligence	21 Li List Building	24 E ERP Automation	27 I Installations	30 Ft FTP Management	33 Da Data Aggregation and Migration	37 Im Inventory Management	41 Ma Invoice, Quote and Contract Management	45 Qu Vendor Portal Queries	54 Pl Policy Admin and Servicing	58 Pe Periodic Disclosures	
8 Cc Call and Contact Centre Processes	10 Tr Transaction Automation	19 Da Data Management	22 Sq Sales Quote Automation	25 Sm Social Media Monitoring	28 Mo Server and Application Monitoring	31 Us User Setup and Configuration	34 Sy ERP/Other Systems Integration	38 Pi Supplier Portal Integration	42 Fr Freight Management	46 Fu Funds Transfer	48 Pr Comparables Pricing	50 Ag Report Aggregation	
9 Se Service Requests and Scheduling	11 Rn Renewal Notices	20 Cr CRM Updates	23 Iv Invoice Creation and Distribution	26 Bi Business Intelligence Reporting	29 Fi File and Document Management	32 Ap Application Integration	35 Ba Batch Processing	39 Wo Work Order Management	43 As After-Sales Handling	47 In Incentive Claims	49 C Collections	51 Jp Journal Postings	
					59 Hi Employee History Verification	60 Eo Employee Onboarding/ Offboarding	61 P Payroll	62 Ti Time and Attendance Management	63 Tr Training and Upskilling	64 Ed Employee Data Management	65 Tx Tax Management	66 Be Benefits and Stocks Admin	
					67 Vs Vendor Sourcing	68 Vq Vendor Qualification	69 Vo Vendor Onboarding/ Offboarding	70 Vr Vendor Reviews	71 Vp Vendor Portal Integration	72 Va Vendor Agreement Maintenance	73 Cm Contract Monitoring and Enforcing	74 Pm Vendor Performance Management	

We know automation.

Our automation services are delivered by experienced consultants and engineers that ensure you can deliver your business outcomes. Explore how RPA can help your business save time and money by speaking with a member of our team.

Task Categories:

- Multi-Purpose
- Customer Service
- Customer Onboarding
- Marketing
- IT
- Supply Chain
- Finance
- Legal
- HR
- Vendor Management

We created the Periodic Table of RPA to help you find opportunities to apply the technology in your own business. Whether you're completely new to RPA or you've already implemented it in your business and want to make the most of the technology, we've identified 74 tasks that are ripe for improvement with the help of RPA.

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Multi-Purpose Tasks

- Competitive Pricing and Monitoring
- Customer Due Diligence
- Customer Data Management
- Customer Engagement Communications
- Compliance Reporting
- Sales and Purchase Order Processing
- Refunds and Returns

These tasks should be your first considerations for RPA application. Many tasks have cross-departmental applications, but we've found these are the most common and therefore could save your business the most time.

Customer Service Tasks

- Call and Contact Centre Processes
- Service Requests and Scheduling
- Transaction Automation
- Renewal Notices

The more customers you have, the more time RPA could save your organisation. Customers routinely require account access assistance (e.g. updating their email addresses or resetting passwords) and chatbots can be set up to identify questions and provide common answers, with the option of elevating the issue to a human worker if needed.

Customer Onboarding Tasks

- New Customer Applications
- Online Registrations
- New Customer Eligibility
- Upsell Opportunity Reporting
- Customer Welcome Packs
- Customer Retention

Customers enjoy personalised messages and user journeys when they join a platform, which is ideal for RPA implementation. Consider streaming platforms or other companies that provide an algorithm-backed service – when a customer joins and sets up their profile they are asked to select from a menu of preferences/topics/genres so the algorithm can start serving content. The same principle can be applied to many other businesses and parts of the customer onboarding process – using automation to ask for customer preferences and then serving them welcome packs and offers based on their choices.

Marketing Tasks

- Market Intelligence
- Data Management
- CRM Updates
- List Building
- Sales Quote Automation
- Invoice Creation and Distribution
- ERP Automation
- Social Media Monitoring
- Business Intelligence Reporting

Whatever they're working on, Marketing teams back their creative ideas with reliable data. Data management and gathering market intelligence are two of the most valuable tasks that RPA can accelerate for your Marketing team. Marketing automation and Customer Relationship Management also demand using large amounts of customer data as your team builds email lists for dedicated nurture streams – automating how these customers are sorted into these lists saves valuable time and removes human error.

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IT Tasks

- Installations
- Server and Application Monitoring
- File and Document Management
- FTP Management
- User Setup and Configuration
- Application Integration
- Data Aggregation and Migration
- ERP/Other Systems Integration
- Batch Processing

Just as it can in Marketing, RPA can greatly help IT teams gather and interpret a large amount of data. IT teams can also lose valuable time to small tasks that support the rest of the business, such as user setup and solving tech issues. Automating as many of these tasks as possible helps keep your team working on valuable, strategic work while ensuring the rest of the business is still supported.

Supply Chain Tasks

- Supply and Demand Planning
- Inventory Management
- Supplier Portal Integration
- Work Order Management
- Shipment Scheduling and Tracking
- Invoice, Quote and Contract Management
- Freight Management
- After-Sales Handling

Improvements in Machine Learning mean that RPA now has important applications in Supply Chain Management. SCM can benefit from inventory management automation by setting bots to automatically reorder products when stock reaches a set level. Historical data can also be used to predict demand patterns while allowing for spikes in activity.

Finance Tasks

- Vendor Onboarding/Maintenance
- Vendor Portal Queries
- Funds Transfer
- Incentive Claims
- Comparables Pricing
- Collections
- Report Aggregation
- Journal Postings

Removing human error is an important benefit of implementing RPA in a financial organisation. And Gartner estimates that one bot can complete 30 times the work of a human employee, meaning a greater amount of work can be completed with a greater degree of accuracy.

Legal Tasks

- Screening and Risk Management
- IP and Fraud Detection
- Policy Admin and Servicing
- Credential Verification
- Licensing and Registrations
- Outside Affiliations Review
- Periodic Disclosures

Legal tasks are ideal opportunities to show how automation can be used to assist, rather than replace, human work. Staying compliant with legislation is essential to business operation though reviewing the phrasing of documents and contracts is long work filled with interpretation. RPA can accelerate your legal staff's review procedures while they remain in control of what is approved and what needs flagging as legal risk.

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HR Tasks

- Employee History Verification
- Employee Onboarding/Offboarding
- Payroll
- Time and Attendance Management
- Training and Upskilling
- Employee Data Management
- Tax Management
- Benefits and Stocks Admin

Large companies with thousands of staff can save great amounts of time with RPA by automating elements of their HR. Initial opportunities can be focused on financial tasks, including payroll and tax management, although the onboarding and upskilling side of HR should not be overlooked. Bots could be customised so they cater to different training needs and manage a wide range of data loads (which will naturally differ between departments and teams).

Vendor Management Tasks

- Vendor Sourcing
- Vendor Qualification
- Vendor Onboarding/Offboarding
- Vendor Reviews
- Vendor Portal Integration
- Vendor Agreement Maintenance
- Contract Monitoring and Enforcing
- Vendor Performance Management

RPA can accelerate your vendor review, selection, and onboarding processes, meaning you spend less time talking about work and more time getting it done. Compliance risks can also be identified quickly against regulations at multiple levels (local, national, international etc.) as well as against your internal policies.

Make the most of RPA's potential in your business

Learn how RPA could help your business save time and money by speaking with a member of our team today.

Adopted RPA but struggling to make the most of it? Learn how our expert consultants can evaluate your current RPA implementation, compare it against industry best practices and identify improvement opportunities.

It all starts with booking your first call with us.

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Ten10 is a leading independent Quality Engineering, Software Testing, DevOps and RPA Consultancy.

Supported by the award-winning Ten10 Academy, our teams of exceptional Consultants and Engineers provide innovative and automated solutions allowing you to deliver quality software and operate it efficiently.

Get in touch today to see how we can work with you.

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