



## Harnessing the power of Hyperautomation for better processes and happier customers

### About the Client

The client is an investment consultant and helps its customers to diversify their portfolio and make prudent investments, in line with the on-going market conditions.

### Business Needs

To deliver excellent customer service, the client had launched a personalized dashboard for all its customers via the Salesforce Community. It showed their customers a consolidated view of their investment portfolio, on-demand.

However, with an increasing customer base, updating this dashboard regularly became a major pain point. This led to the client searching for solutions to optimize this extremely time-consuming, error-prone, and manual process.

Having worked with V2Force before, the client consulted us. After assessing the situation and understanding the client's goals, V2Force had found an answer to the business challenge - BOTs.

### Solution

**V2Force's RPA team mapped the entire business process that the client's team was following. After eliminating process inefficiencies, the team designed BOTs that performed the following steps:**

- ✓ Log into each of the systems of various financial institutions, at varying but predetermined frequencies.
- ✓ Download the key data points and enter it in an excel file for each customer.
- ✓ Upload the excel file in Salesforce.
- ✓ A rule-based, repetitive process was an ideal candidate for RPA and once the BOTs were deployed it transformed the entire process – While the client's financial team took hours to update a single dashboard, the BOT needed only a few minutes – and it was 100% error-free.

### Benefits

- Significant increase in customer satisfaction due to 0 errors in their financial data.
- A boost in process efficiency.
- Shifted focus of valuable resources to revenue-generating activities.