



BOT AND HUMAN – AN UNSTOPPABLE DUO

Abstract

Partner Program Manager at an American wireless network giant, Emily Williams manages the company's business partnerships. When the company's manually intensive purchase order creation and procurement processes began affecting operational productivity and timeliness, Emily began contemplating a holistic automation solution and sought long-time partner, Infosys BPM's support. This case study details how Infosys BPM effectively helped Emily to cut down manual effort, reduced overall PO creation time, and drastically decreased open orders, all with 100% process compliance.

Procurement taking long

As Partner Program Manager at an American multinational telecommunications conglomerate, Emily Williams manages several of the company's business partnerships. She is responsible for zeroing down on partnership budgets and resource allocations, as well as tracking partner service level agreements and key performance indicators (KPI).

The telecom company's manually intensive and lack of efficient procurement processes served as a direct invitation for Emily's intervention. The overall procurement operations had multiple touchpoints and

fragmented technology systems, leading to duplication of materials and loss of savings. Specifically, the creation of purchase orders (PO) from purchase requests (PR) was very time-intensive requiring multi-level manual follow-ups with vendors for acknowledgements on PO reception. After this, the procurement teams also had to manually schedule shipping dates and get courier tracking numbers to process the order deliveries.

Further, while the company's enterprise resource planning (ERP) systems tried matching the purchase orders, invoices,

and goods receipts with each other, there are multiple instances where the details do not match. As a result, the ops team had to manually analyze the discrepancies, by gathering various data points and running data validations.

Emily realized the company's PO creation process needed to be automated, and that she would need to leverage external business transformation expertise for this.

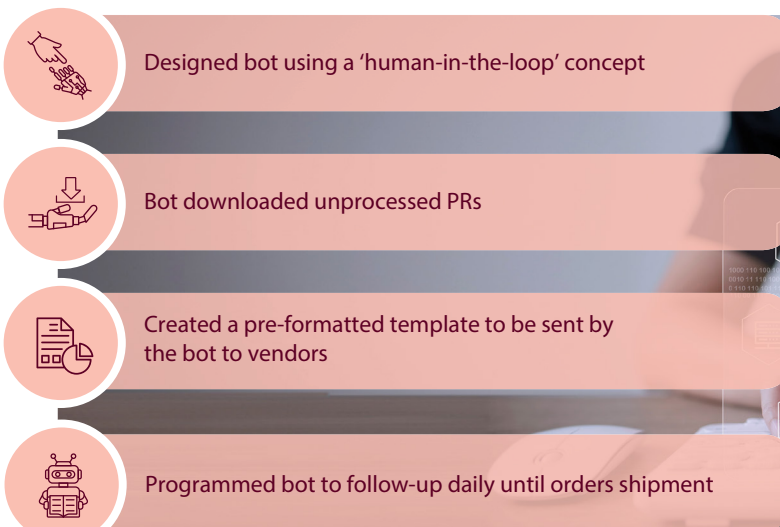
Introducing vendors to bot

Having worked closely with an Infosys BPM team since 2010 on several other projects through the years, Emily called up Aaron Miller, the Infosys BPM team lead, explained the challenges and enlisted his support for the automation journey. To kickstart the project, Aaron and his team first closely analyzed the overall

procurement system and its process flows. Having identified the various touchpoints, they came up with an action plan to automate the procedures for elevated overall efficiency. The idea was to strike a balance between humans and intelligent automation for an optimal solution. To achieve this, Aaron and the team designed

a UiPath RPA bot with a 'human-in-the-loop' mechanism. That is, they engineered the bot in a way that it leveraged vendor contributions to achieve end-to-end automation.

Approach summary



In the new automated PO creation process, the bot downloaded unprocessed purchase requests, gathered relevant information from client applications, and then after validating the data positioning, created the purchase orders. Post this, it downloaded open order reports from the ERP system, identified the order status, and sent out a standardized email to the vendors with a pre-formatted Excel template attached. The next step in the process involved vendors filling in the Excel template with shipping dates or tracking numbers for the shipments. Once the needed data from the vendors was

received, it would be uploaded to the ERP system in batches after a sanity check, and the bot would continue to automatically follow-up on open items daily until the order was shipped.

The project was not without its fair share of challenges, such as with getting the required credentials and application access for the bot. Also, during the pandemic, it was difficult to coordinate process walkthroughs and clarify doubts due to Covid outbreaks and the unavailability of several subject matter experts. However, Aaron's team managed to work around

these issues and ensured that the system was up and running smoothly.

To test the bot's effectiveness, Aaron worked closely with Emily to devise a new KPI called the vendor response rate (VRR) – a percentage of correctly filled-in templates received by the bot as compared to the total number of emails sent to the vendors. Their analysis of the VRR revealed the vendors gradually warming up to the bot. In the first month of its implementation, VRR stood at only 10% but eventually it grew to over 50% within six months.

Reaping benefits of bot

With most of the vendors being leveraged with Aaron's 'human-in-the-loop' concept, the UiPath RPA bot delivered a big processing efficiency boost, and its in-built follow-up mechanism also significantly improved order tracking. Purchase orders are now created in just 10 minutes instead of the earlier 16 minutes and the process

for open orders halved from four minutes to two minutes, reducing the number of open orders drastically. Also, discrepancy management now takes only four minutes reduced from the earlier six minutes and as a result, within six months, the bot brought down the aging of discrepancies from 15 days to just 10 days.

Overall, the end-to-end bot implementation decreased the earlier manual effort of the operations staff, saving a total of 56 hours each day while also ensuring 100% process compliance.

Key benefits





Emily's and the procurement team's new 'bot friend' also made it to the company's annual business review meeting, where it gained all-round appreciation for its positive impact on operating efficiency.

Impressed with its outcomes, a senior leader of the company soon made a visit to meet Aaron and his team, celebrate their success, and to initiate new automation projects. While these projects are expected

to deliver even more added productivity and operating efficiency for the company, they also mean more bot friends for Emily and her procurement teams!

**Names have been altered to preserve the identities of the people involved.*

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