



A global retailer case study

CLEVVA digital workers solve data management quality issues

A global retailer operating off SAP experienced significant and costly data management challenges, largely due to staff interpreting the front-office policy and procedural rules incorrectly. This led to incorrect data inputs and selections that impacted data integrity as well as creating downstream processing errors. While improved training helped, it did not stop staff from making costly mistakes.

The company was looking to automate much of this work, and implemented a number of Robotic Process Automation (RPA) digital workers to perform repetitive and high volume back office processes. And while this helped, the decisions and actions taken by staff in the front-office impacted their ability to automate without breaks or errors.

The challenge

- Trained staff struggled to remember and then correctly apply the right rules. This impacts vendor management, accounts receivable and accounts payable decisions and leads to incorrect data entry into SAP.
- The time it takes a new staff member to learn all the policies and procedures means that staff have to specialise in an area. This reduces staff flexibility.
- Poor decision-making leads to loss of revenue as well as costly errors. It also makes it very difficult to prove that a poor decision was due to corruption and not incompetence.
- Clients report significant frustration with vendor onboarding as well as payment. This negatively impacts vendor relationships.
- The contextual nature of the business rules make it very difficult to offer customers self-service (they need to read and interpret too many rules)
- Free-text call reports vary dramatically in detail and quality, making follow ups and reporting very difficult.

The requirement

- + Navigate staff through all decisions that impact back office processing
- + Ensure the right rules are applied, in context, to every decision, and the right information is gathered in the right formats for effective straight through processing
- + Reduce the amount of training needed to get staff performing across vendor management, accounts payable and accounts receivable processes
- + Reduce invoicing and payment errors
- + Improve the speed of vendor onboarding
- + Offer vendors and customers the ability to self-service via digital channels (instead of being forced to engage via the contact centre)
- + Improve data integrity
- + Improve compliance and reporting (BI)



AUTOMATE.
INTELLIGENTLY.

The solution

A team of automation specialists worked with a hand picked group of process experts within the business to capture the contextual logic they mentally apply when making vendor management, accounts payable and accounts receivable-related decisions. They also reviewed the data requirements for straight through processing, to ensure that the outputs would support the RPA digital workers.

Within a couple of agile sprints, the team had captured the front-office process logic required to handle all known user stories. Once the logic was validated, the digital

workers were then deployed onto staff screens via a 3rd party chatbot interface. This co-Bot asked all the required questions and gathered all the required data before handing over to the team of unmanned digital workers that then carried out the required system processes in SAP.

To optimize the process flow, the CLEVVA digital workers were also integrated directly into the company CRM so customer data could be leveraged i.e. the customer was never asked for data that the company already had.

The results



Staff were not required to know their policy and procedure rules. Their CLEVVA digital co-worker, accessed via the 3rd party chatbot interface, took care of it for them. This not only reduced all training requirements, but reduced decision errors



The CLEVVA digital co-workers ensured that all required data was gathered in the required formats for back office processing. As a result, RPA run failures were prevented.



Processing errors were almost entirely eliminated. Where errors occurred, human inputs were always the cause. Additional validation logic was then added to ensure there was no chance of staff misunderstanding their digital co-workers request.



Once the logic was validated, the company could deploy a customer self-service chatbot. The chatbot allowed customers to get things done quickly, easily and without error. This improved customer satisfaction, and reduced customer support call volumes

The benefits

By building a team of CLEVVA digital workers to handle all the front-office process work, the business could significantly reduce the dependency on staff decision-making accuracy. Context matters when it comes to the front office, and while staff knew the rules, they often made interpretation errors.

Handing this responsibility over to a team of digital process specialists meant that staff could focus their efforts on the customer experience, without having to worry that the right questions were asked, the right information was gathered, the right answers were given and the right actions were taken. This was all taken care of by their CLEVVA digital co-workers.

In addition, the CLEVVA digital co-workers were designed to ensure that the RPA digital workers would receive the right data in the right format for them to process the resulting back office system actions without run breaks or errors.

Staff won, customers won, and the business won.

