USE CUTTING EDGE TECHNOLOGY TO IMPROVE YOUR COMPANY’S PRODUCTIVITY AND EFFECTIVENESS

WHAT IS ROBOTIC PROCESS AUTOMATION?

TECHNOLOGY THAT AUTOMATES MANUAL, TIME-CONSUMING ACTIVITIES...

ACCELERATE BUSINESS ACTIVITIES
Business processes will move faster with fewer bottlenecks allowing more work to take place in less time

ELIMINATE HUMAN ERRORS
Ensure business processes are performed consistently and accurately

ENABLE ANALYTICAL WORK
Reduce commodity work and shift staff to where they add value

...AND WORKS WITH YOUR EXISTING SYSTEMS, ENABLING FAST BENEFITS

WHY CITRIN COOPERMAN?

BUILT FOR THE MIDDLE MARKET
Fortune 500 experience with expertise in the middle market. We understand how the middle market determines priorities and what it takes to execute here.

FOCUS ON EXECUTION
Our consultants don’t just advise, they also execute. We only provide advice we know is realistic for your business and bring the talent required to do so.

WE UNDERSTAND VALUE
Our background as an accounting firm means we care about the numbers in everything we recommend and always consider bottom-line benefits.
OUR METHODOLOGY CAPTURES VALUE QUICKLY

**PROCESS DISCOVERY**
Identify potential RPA opportunities and prioritize highest value and lowest risk processes.

**PILOT**
Design and build one limited scope automation to prove value.

**BUILD AND EXPAND**
Develop and deploy new automations across other business processes.

RPA CASE STUDIES

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<th>CHALLENGE</th>
<th>RESULTS</th>
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<td><strong>FINANCE</strong></td>
<td>Automated 80% of invoice processing&lt;br&gt;Automated 29% of account reconciliations&lt;br&gt;Automated 94% of tax management reporting</td>
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<td>A global insurance company’s staff was spending too much time on repetitive accounting activities.&lt;br&gt;Manual invoice processes, account reconciliations, and tax reporting consume a disproportionate number of staff hours.</td>
<td>• Reduced lost revenue by 14% for newly hired agents and 5% for tenured agents&lt;br&gt;• Improved customer satisfaction (CSAT) by 4.9% for newly hired agents and 1.6% for tenured agents</td>
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<td><strong>OPERATIONS</strong></td>
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<td>A call center’s representatives were making many mistakes when processing customer address changes. These errors were causing repeat callers, poor customer satisfaction, and lost revenue opportunities.</td>
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KEYS TO SUCCESS

**ALIGN THE TEAM**
Host functional and technical design sessions to make sure business users and technology architects are on the same page.

**WALK BEFORE YOU RUN**
Understand the complexity of the processes you want to automate well in advance and focus on low-risk processes first.

**FOCUS ON CHANGE MANAGEMENT**
You will probably need to ask people to re-engineer their processes; this requires change management and training before go-live.

**TESTING**
Over-test the robot to ensure it handles exceptions properly within the test environment before you go live.