



directio

CASE STUDY



The Client

Leading FMCG company **Global Business Services (GBS)** is one of the company's four pillars and consists of 7,000 people who support 127,000 employees and 300 brands sold in 180 countries. At GBS recommendation, we organized a workshop for the factory in Lodz. Their main objective is to transform the way business is done by creating innovative business-building capabilities and ensuring operational excellence of services.

Project Goal

Back in 2018, our client requested to set up a joint workshop and identify which processes within the plant could potentially be automated using Robotic Process Automation (RPA). We prepared a list of criteria to evaluate all the available options and created a shortlist of 15 internal processes that complied with all requirements. In the end, we decided to automate with RPA the VAT reconciliation process as a pilot project.

Challenges

Deploying a pilot project is always challenging, especially when the process is more complex. Gathering all the information and mapping the full VAT reconciliation process proved difficult at first, especially because we were working with different stakeholders in the company.

The focus of this project was the conversion of PDF files using RPA, i.e., reading data using OCR, filing Excel file and forwarding data via email. The steps were clear: the robot read the emails, awaiting special string in the title, then downloaded the attached Excel files, read and verified the data. Where it identified issues, it sent back an email to flag them, otherwise it sent a summary of all data.

As this process involved scanning invoices with Optical Character Recognition (OCR) technology, we focused on the issues we encountered with the OCR accuracy. All businesses need accurate information in order to run their operations so gathering data into a useful format is crucial in this context.

Our Directpl Approach

After assessing the client's business needs, we presented our evaluation and conclusions to the client team of consultants and recommended implementing an RPA solution designed with UiPath technology. In the deployment phase of the pilot project, we built a small dedicated team of two UiPath certified developers and a Project Manager to ensure smooth communication with the P&G team of consultants.

When implementing the RPA solution, our developers moved the process from Proof of Concept (PoC) to the pilot phase and into full adaptation within the client environment. Our PoC implemented an actual robot in a test environment that concluded with a detailed report outlining if and how many errors occurred during the process. As the project moved further, we continued to test and enhance the robot's efficiencies and add new functionality where needed.

Team Communication

- We quickly adapted to the specific communication patterns of a global company.
- We ensured an efficient approach and process throughout the entire duration of the project.
- We showed full commitment to setting and achieving the right milestones to ensure on-time delivery requirements.

Results

- We successfully achieved the Project Goal within the scheduled timeline.
- We increased the OCR accuracy to around 80%.
- We improved the usability of the tool for the users and the productivity of support teams.
- The pilot project ran smoothly for the 2-month period it was deployed, and currently it is awaiting deployment to PROD.