

# Leading Financial Institution partners with Celerity to Reduce Level of Effort by 85%

The benefits of robotic process automation (RPA) are driving adoption in technologically savvy organizations, with the market expected to grow to nearly \$3B by 2023. RPA is a powerful business tool, removing the need to integrate systems in order to simplify processes and communications across the enterprise, and enabling substantial productivity gains in a very short time frame.

So, with operational costs increasing year over year, one of the largest credit unions in the country chose to invest in RPA to improve the efficiency of their organization. Because this was their first foray into bot-driven processes, they needed help piloting the initiative and identifying the right processes to automate. They put their trust in Celerity.



## At-a-glance:

**Customer:** Leading Credit Union

**Industry:** Financial Services

**Country:** Virginia, USA

**Products and Services:** Microsoft Azure, Automation Anywhere



# Leading National Financial Institution

## Customer Challenges

Celerity began by working closely with the credit union to understand their current processes and challenges. This discovery phase resulted in twenty processes that were candidates for automation and a benefit-effort matrix that helped prioritize them. The credit union worked with Celerity to select the processes that would become their first proof-of-concept for RPA.

## Celerity Solution

From there, Celerity prepared each process for automation by refining the manual activities, standardizing tasks and information, identifying exceptions and exception remediation steps, and documenting and illustrating current state and future state. After the process preparation, bot development began using Automation Anywhere and an Agile approach. Process analysts and bot developers then worked iteratively to refine and optimize the automated process.

## Customer Benefits

The RPA-enabled processes implemented by Celerity resulted in an 85% reduction of effort, saving time that could now be put toward more mission-critical initiatives. In addition, the RPA process enabled the credit union to accurately assess process gaps in their internal systems, spot deficiencies in their test environment and test data, and identify redundant manual processes, giving them greater control over subsequent automation efforts.

Ultimately, the proof-of-concept enabled the credit union to prioritize and focus their investments more effectively, opening up new possibilities for changes moving forward. Celerity not only solved the immediate issue, we gave the credit union valuable knowledge toward using RPA as an efficiency tactic within their organization in the future.



85% Reduction in Level of Effort to complete processes



Framework for process improvement and automation



Deeper understanding of release process

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