BFA’s PAYGo NEXT Innovation Gallery | GOGLA AGM
Increasing Productivity with Automation (RPA)
“Robotic process automation (RPA) is the use of software with artificial intelligence (AI) and machine learning capabilities to handle high-volume, repeatable tasks that previously required humans to perform.”

– IoT Agenda
RPA key benefits

- **Increases accuracy** of executing tasks; better compliance
- **Reduces time** to perform a task
- **Increases productivity & employee satisfaction** by freeing up time for employees to work on more strategic tasks
- **No change in IT systems**: flexible and scalable without needing more staff
- **Improves customer experience** and **powers business growth** through an enhanced team.
Use case spectrum

**Commercial functions**

<table>
<thead>
<tr>
<th>Marketing</th>
<th>Sales</th>
<th>CRM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leads mgmt.</td>
<td>Sales processing</td>
<td>Customer profiling</td>
</tr>
<tr>
<td>Updating scorecards</td>
<td>Getting billing info</td>
<td></td>
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<tr>
<td>Invoice mgmt.</td>
<td>Resolving customer issues</td>
<td></td>
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</tbody>
</table>

**Support functions**

<table>
<thead>
<tr>
<th>Finance</th>
<th>Operations</th>
<th>Procuring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial planning</td>
<td>Updating inventory records</td>
<td>Updating vendor records</td>
</tr>
<tr>
<td>Bank stmt. reconciling</td>
<td>Issuing refunds</td>
<td></td>
</tr>
<tr>
<td>Daily P&amp;L preps</td>
<td></td>
<td></td>
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</tbody>
</table>

**Industry-specific**

<table>
<thead>
<tr>
<th>Banking</th>
<th>Insurance</th>
<th>Telcom</th>
</tr>
</thead>
<tbody>
<tr>
<td>KYC</td>
<td>Claims processing</td>
<td>Credit checks</td>
</tr>
<tr>
<td>Loan processing</td>
<td>Appeals processing</td>
<td>SIM swapping</td>
</tr>
<tr>
<td>Trade execution</td>
<td>Partner queries mgmt.</td>
<td>Customer dispute resolution</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Porting customer numbers</td>
</tr>
</tbody>
</table>

Source: Aimultiple.com
Reconciling **customer payments & invoices**

### Before

- **Person reads** customer payment details in database
- **Person extracts** customer and invoice details
- **Person checks** to see if invoice is available and there’s a match with the product
- **Person enters** the new payment data into system and saves the record

### Effort and outcome

- Person processes all records
- High likelihood for human error
- Time-consuming process

### After

- **Bot extracts** customer payment details from sheet
- **Bot iterates** and enters data into the payments and invoice management system
- **Bot flags exceptions** in a separate sheet for a person to address

- Person only processes exception records
- Up to 99% increased accuracy
- Faster straight through processing
RPA quick-start guide

Identify relevant process
- What makes most impact
- What can be easily automated
  - Rules-based
  - No existing solution
  - Stable processes/systems

Create case for buy-in
- Management support
- Team support
  - Relevant skillsets if in-house
  - If outsourced, plans for team responsibility changes

Simplify process as much as possible
- For easy understanding
- Minimal programming requirements
- Minimal auditing effort
- Clarify team responsibilities and IT ownership

Implement RPA solution
- Choose tool/partner/vendor
- Develop
- Deploy
- Maintain

RPA quick-start guide
Assisting agents and customers

Karibu, I'm Abi. I'm here to help you run a great PAYGo business!

Happy Tuesday. I’d like to get your feedback on the new Credit 2.0 KYC and screening training last week. Could I ask you a few questions?

- Yes, of course!
- I suppose...
- Nope.

Try it yourself:

gogla-bot.fibr.ai
Karibu, I’m Abi. I’m here to help you run a great PAYGo business.

Happy Tuesday. I’d like to get your feedback on the new Credit 2.0 KYC and screening training last week. Could I ask you a few questions?

Of course! | I suppose ... | Nope.

You’re awesome! This will only take a few minutes.

We’ll keep it short - promise! This will only take a few minutes.

No worries, hope you enjoy the rest of the day!

Before we start, could you tell me your name please?

[User enters name]

Asante, user_name. I have three questions for you.

Next Question ...
First question - Did the training cover all of the topics you would need to successfully roll out our Credit 2.0 process?

Very much so! | More or less, but was missing some valuable information | It was not a good use of my time

Very happy to hear that!

I see! Could you tell us which one training topic we could have done a better job with?

Yes | No

Please tell me the name of the topic you have in mind. If you don’t remember the name, a description will also do.

[User enters event name/description]

Thank you, we’ll look into it. Let me ask you the second question.

No worries, let’s move on to the next question.

Oh dear! Could you tell us in a few words where we went so horribly wrong?

Yes | No

Please tell me about the biggest disconnect for you in terms of what you expected.

[User enters event name/description]

Thank you, we’ll surely look into this. Let me ask you the second question, if I may.

No worries, let’s move on to the next question.

Next Question ...
What have you enjoyed the most about being a PAYGo Agent?
- Earning potential
- Working with a Team
- Flexible work hours
- Social impact to my community

Glad to hear it. I hope you have outstanding sales this month!

I agree! Aren’t they the best?

Glad to hear it!

Thank you for being part of our mission -- your contributions truly make our world better!

Next Question ...
Last question! How likely are you to recommend PAYGo sales to a friend?
Absolutely would! | Very likely | Will have to think about it | No way...

Music to my ears, username :)  
Good to hear, username!  
Fair enough, username!  
Sorry to hear that, username :(  

Thank you so much for taking the time to share your thoughts!

Kwaheri, username!
Next Steps

1) I'm interested, what do I do next?

- Explore your use cases, data, audience
- Type of chatbot basic vs advanced
- Channels you could use
- Level of automation

2) What tool did you use for this demo?

- collect.chat

Other examples:
http://vendors.r2accelerator.org/
Thank you!