



CASE STUDY

# Achieving 90% Efficiency Gains: Automating Client and Project Creation for a Tax Firm

## Organisation Profile

Founded in 1999, the client is a leading tax consulting firm with offices nationwide. They partner with major corporations and certified public accountants (CPAs) to provide specialized tax solutions, offering value-added services that enhance traditional tax and accounting functions.

## Industry

Finance

## Results

Increased Process Efficiency up to

**90%**

Manual effort reduced up to

**90%**

Enhanced accuracy up to

**95%**

## Business Problem:

The company faced severe operational inefficiencies due to labor-intensive manual processes across multiple platforms. The client creation in their PCS Application was encumbered by navigating numerous screens and extensive data entry, leading to frequent errors. Similarly, client and project creation in Salesforce and Practice CS required complex updates and field mappings, which exacerbated the inefficiencies. Additionally, the KROST client creation process in the PCS Application was hindered by cumbersome multi-screen data entry, and project creation in Salesforce for R&D encountered issues with manual navigation and high error rates, highlighting the critical need for automation.

## Solution:

- **Client Creation in PCS Application:** A bot automated the client creation process in Practice CS by managing a queue of client data, logging in, and entering details across multiple tabs, leading to the creation of related projects.
- **Client and Project Creation with Salesforce and Practice CS Application:** A bot retrieved PRQ records from Salesforce, extracted relevant data, created clients and projects in Practice CS, and updated corresponding IDs in Salesforce objects.
- **KROST Client Creation in PCS Application:** A bot automated the client and project creation processes in Practice CS by processing data from various sources, customizing client setups based on engagement and project types, and creating associated projects.
- **Project Creation in Salesforce - R&D:** A bot utilized APIs to efficiently retrieve and process project data in Salesforce and PCS, significantly improving accuracy and efficiency compared to manual methods.

## Challenges:

- Client Creation in PCS Application
- Client and Project Creation with Salesforce and Practice CS Application
- KROST Client Creation in PCS Application
- Project Creation in Salesforce - R&D



## Business Benefit:

Implementing the Bot has delivered substantial business benefits, achieving up to 95% process completion accuracy. This automation reduces manual efforts by around 90% and significantly cuts process time. These enhancements boost operational efficiency and productivity by up to 90%, leading to superior overall business performance.

## Key Stakeholders:

- Client's IT Department
- Bot Developers
- Engineers
- Quality Assurance Team
- Project Management Team
- End Users of the Bots



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