

A woman with dark hair, wearing a white button-down shirt, is sitting at a table. She is smiling and looking towards the right. In front of her is a tablet computer and two glasses of water. The background is a bright, out-of-focus office or meeting room.

# Unexpected ways to calculate ROI for automation

Automation efforts have sped up in the post-pandemic economy. This is a scary trend for some, who fear automation puts their jobs at risk. But a slew of new research suggests that automation will create far more jobs than it eliminates. Artificial intelligence and robotics are well known for saving time and money, and they can switch the handling of dangerous tasks from humans to machines. They can also create new opportunities for human employees to move on to higher-level, higher-value work.

When workers can skip tedious tasks like processing invoices or entering data for insurance claims, their turnaround time is faster for other tasks. Because automation saves them precious minutes on logins and database lookups, they can spend more time talking with customers and generally offering better customer service. In a world where consumer demand is at an all-time high, automation not only cuts costs but also indirectly boosts the bottom line.

Below, we'll explore a few ways to calculate the ROI behind automation, some more common, plus a few you may not expect.

## 1. Improved customer experience

Consumers are increasingly impatient, and they're as likely as ever to drop your company when they get poor customer service. This means you can't afford to miss a beat when handling routine requests like address changes or policy cancellations. And you certainly can't afford a misstep when making a sale or handling a complaint. Automation helps process routine requests faster and preps your customer-facing staff with more information for personal calls and outreach.

Automation Hero helped a global logistics company that was drowning in customer requests around price quotes. How much would it cost to send a package from Chicago to Berlin? Calculating such answers and responding to customers took a disproportionate amount of time for one team. Automation Hero built a two-step AI model (first identifying requests, second extracting the relevant information from requests) to automate responses to 60% of these incoming inquiries. In the end, this led to an 80% workload reduction for the team fielding responses, mere seconds in response time, and overall higher customer satisfaction. Because the company could answer quote requests faster, they saw significant increased wins in other departments.

# 80%

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## 2. Better employee retention

The qualitative benefits of automation include one that's less obvious but still important: making workers happy. This is particularly important for ROI when it comes to call center and customer service employees, who have notoriously high turnover. When you eliminate repetitive tasks, staff gets reassigned to higher-level, high-value activities that are more fun. This means they'll be more engaged with their jobs and stick around.

An intelligent automation platform with built-in AI can also augment employee decision making, providing critical insights from data patterns. The added wisdom, through process mining or other data analysis, leads employees to more success in their roles — and thus increased job satisfaction. These employees will be more likely to achieve career goals and benefit your company.

At Automation Hero, we worked with a leading German health insurance company that handled approximately 130,000 new policies per year. It took a team of 450 sales reps between 15-30 minutes a day to manually handle. To close the policies, reps pulled data from multiple systems (e.g. SAP and a CRM) and pasted it into a Word document. After data extraction, the document had to be printed and signed. We used automation to compile relevant information into a PDF for e-signature, saving the employees the equivalent of 18 years' worth of work. With so much time back, those employees could be reassigned to functions like customer service, cross- and upsell opportunities, and closing new business.

# 28%

Automation Hero saved a team of 30 approximately 28% of case creation in Salesforce, meaning they had more time to proactively reach out to customers and update information.

### 3. Increased operational efficiencies

At large companies, speeding up the turnaround time on one critical internal process can mean efficiency gains across the board. It can also mean staying in compliance with industry regulations.

Automation Hero worked with a large insurance agency struggling with the time each agent spent on website logins and retrieving data from external systems. Because the agency dealt with more than 100 insurance carriers, all related insurance policies expired at different times on a rolling basis. A team of nearly 30 people monitored this in Salesforce.

But the time it took to leave Salesforce, log into each carrier website, and retrieve data was significant — a level of effort the team could only muster once every few months. That meant customers frequently missed out on the grace period between policy expirations, customer data was out of date, and the agency ran a constant risk of being out of compliance with carriers.

Our backend automations helped the team zip through logins and data retrieval, ultimately landing on Salesforce screens fully populated with expired policy cases in just a few minutes. This saved the team of 30 approximately 28% of case creation, meaning they had more time to proactively reach out to customers and update information, well before individual policies expired. In the end, this resulted in a seven-figure ROI.

### 4. Improved data quality

Deep inside large companies are squads of fact-checkers that ensure data quality. These quality control teams check contracts, policies, and other documents against outside sources, like property databases, to ensure that company records are accurate. Are all names spelled correctly? Do addresses match the external databases?

The trouble is, this tedious work is carried out by humans who would likely rather be doing higher-level tasks. Automation Hero can create a simple solution that automates up to 70 percent of this work, with accuracy that outpaces human fact-checkers over time.

### 5. Cost savings

When McKinsey looked across industries, the consultants found that companies automating 50 to 70 percent of tasks could see 20-35% annual run-rate cost efficiencies, resulting in staggering ROI in triple-digit percentages. KPMG found similar numbers, noting that successful process automation projects gain financial services companies 40-75% in cost savings, with payback varying between several months and several years.

Automation Hero worked with a German insurance company with an inefficient system for payment authorizations. Employees were manually scanning information for each

transaction, then extracting data from documents and keying that into a centralized database. We used a combination of optical character recognition (OCR) technology, validation rules, AI and fuzzy matching to cut processing times in half, resulting in \$1.2. million in ROI.

## **A boost for whatever you're measuring**

Companies measure progress in all sorts of ways, from classical productivity metrics to fraud rates to NPS scores. Automations large and small can improve these metrics, whether it's a database lookup that saves everyone 5 minutes a day or a handwriting translation tool that saves a team of 20 people 10 hours a week. Automation can be both a short-term fix with quick wins, and a tool to help your company achieve its long-term, big-picture goals

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## **What is Automation Hero?**

Automation Hero's end-to-end automation platform for the modern enterprise combines screen scraping, structured and unstructured data processing, machine learning, and the human workforce. It's an operating system for automation — intelligently automating everything from simple tasks to complex business processes. This improves information worker productivity and drives more successful, optimized business outcomes. Its powerful backend focuses on three key areas: eliminating repetitive and time-consuming tasks, automating common asks and augmenting employee decision making.