Presenters

EnableSoft Founder and CEO, Richard Milam

Armed Forces Bank Product Manager, Scott Portwood

Our Customers

A Major Credit Card Services Provider

"As you are aware, we have used Foxtrot for over 15 years now, and I personally have appreciated the product and our partnership that has resulted. I was so impressed by your willingness to meet with us as a partner back, in 2002, after we had been using Foxtrot for about six months to assess the "fit" of the product with our organization's needs. It has not only been an incredibly nimble and flexible tool, but your support staff has always been helpful, courteous, knowledgeable, and "Johnny-on-the-spot" when we needed them."

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A Former Banker Now at a Credit Union

"I can't tell you how excited I am to have Foxtrot in my toolbox! I've already got our first "production script" running – a task to update just over 27,000 records. Our core system is slow to respond, so I can only update seven to eight records per minute, but that's much faster than the one or two that can be updated by a human – and isn't the efficiency of updates and guaranteed data integrity what Foxtrot is all about?"

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Our Customers

A Leading Manufacturer

"I wanted to reach out and share with you a fabulous product out on the market for scripting. The product suite goes by the name of Foxtrot. I can envision dozens of uses in a distribution setting, especially for a 3PL (implementations, slotting, new location creation, SKU adds, etc.). We have eliminated *ALL* the OT we used to devote to data entry functions. Additionally, whereas a 200 item add (think Part Master File) used to take a day and a half to enter manually, it is now done in about three minutes with the script."

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Our Journey…

I. Automating Bank Conversions During the Savings and Loans (S&L) Crisis - 1990s

- Banks converged during the crisis driving the need for innovation
- Although unnamed, Robotic Process Automation (RPA) enters the scene
- IT staff find new robust technology unbelievable
- A need for Robotic Process Automation lingers after the conversion

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Our Journey continued…

II.   The entrepreneurial event, in May 1995
- EnableSoft is incorporated; Foxtroting!
- From *SVP* to *CEO*; no more day job
- Driving cross-country; a long vacation

III.   The CEO toolbox
- Flying cross-country to sell, sell, sell
- CEO training from experts and entrepreneurs
- The right people in the right seats

Our Journey continued…

IV. Not for the faint of heart
- Educating an industry is not easy
- Sincere flattery?

V. Lessons learned
- A focus on customer service
- Building a culture of service, innovation, and discovery
- It is easier when you have company

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Our Journey…we are still innovating…

VI.   Robotic Process Automation revolutionizes organizations' business practices and workflow

VII. Foxtrot evolves as the leader in the Robotic Process Automation m   still evolving)

VIII. EnableSoft grows
- Inc. 2014 - #4513
- Inc. 2015 - #3834

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The Wall Street Journal – *The New Bookkeeper Is a Robot*, 05/05/2015

In corporate finance departments, software does tasks that once took armies of people...

Big companies are using automation software to automate data tasks:

▸ Companies are using "robots" to automate tasks such as accounts-payable, inventory-control, audit reports, and even to estimate operational needs

▸ With the influx of information (from RPA), data analysts are in top demand due to their focus on profits, revenue, and cash flow

▸ Companies remain with the same number of staff and simultaneously increase profits

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Harvard Business Review – *Are All Employees Knowledge Workers?*, 04/05/2015

Towards an understanding of the differing workers inhabit and how they contribute to economic growth and the evolution of culture...

"Creative talent," or, "knowledge workers," includes the entire workforce:

▸ Unleash passion from front-line employees through encouragement and problem-

solving support

▸ Redefine all jobs, view every human as a problem-solver and knowledge worker

▸ This will foster widespread performance improvement

Source: https://hbr.org/2010/04/are-all-employees-knowledge-wo.html

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Who We Help?

The Typical Foxtrot Customer

▶ Focused on increasing efficiency within their organization

▶ Tasked with completing large projects | **core conversions, data breach recovery, etc.**

▶ Overburdened with routine processes | **account creations, update inventory, etc.**

▶ Strained with striving to do more with fewer resources | **limited staff, reduce costs, etc.**

▶ Fatigued from mundane, routine data tasks | **feeling devalued and unstimulated**

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How You Are Doing It Now

Manual

- ✓ Time-consuming
- ✓ Inaccurate and inefficient
- ✓ Causes data inconsistences
- ✓ Minimizes employee intelligence

Custom Programming

- ✓ Purpose specific
- ✓ Knowledge intensive
- ✓ Inconvenient
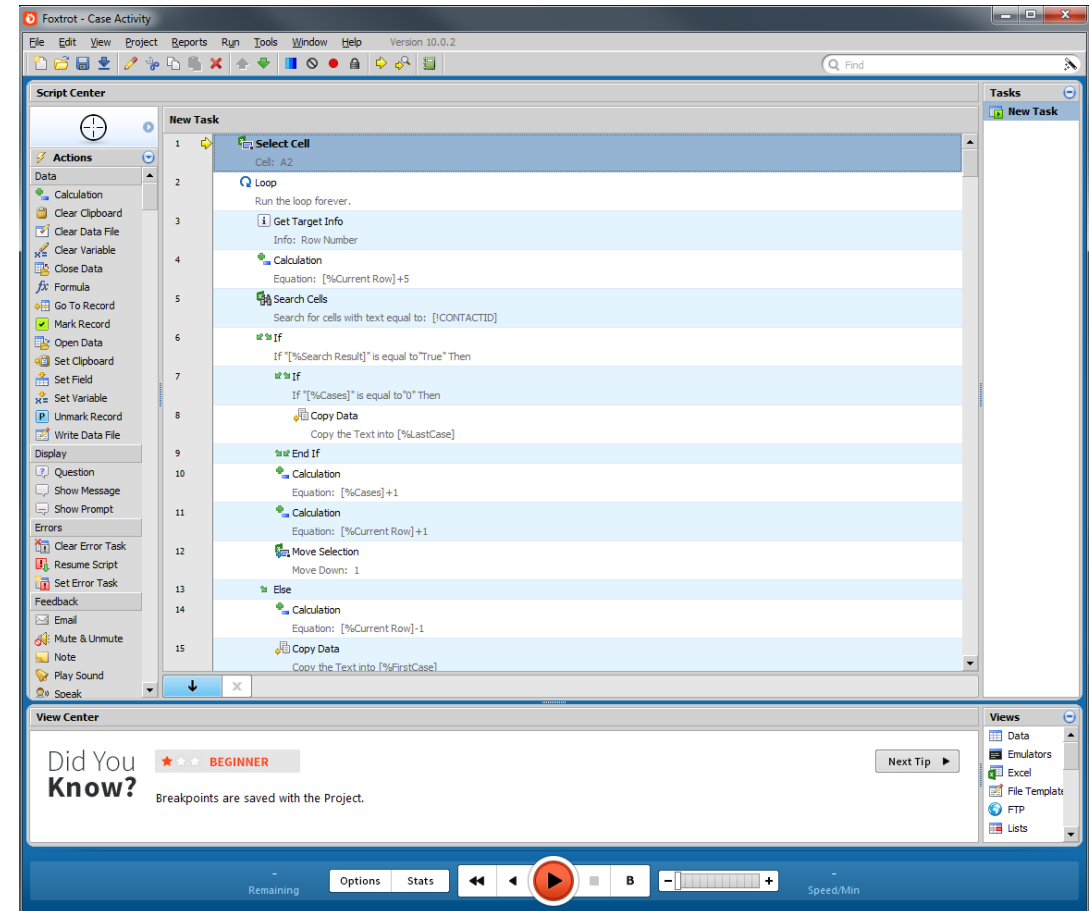- ✓ Provides no audit trail

Outsourcing

- ✓ Lengthy search process
- ✓ Difficult to negotiate
- ✓ Lengthy timetable
- ✓ Extremely costly

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Foxtrot: Your Automated Employee

The solution: Robotic Process Automation

- ▶ Easy to learn and use

- ▶ Intuitive, Smart Technology

- ▶ Quick and accurate

- ▶ No coding. No programming.

- ▶ Performs an infinite number of processes

- ▶ Used in all departments (operations, lending, IT, etc.)

- ▶ Immediate Return On Investment (ROI)

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Case Study – ARMEDFORCESBANK

Scott Portwood, Product Manager

I. Began using Foxtrot 15 years ago
  - The need to automate the multiple services they provided for financial institutions
  - Easy to use
  - Easy to deploy
  - Scripting is a snap—Foxtrot is intuitive

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Foxtrot Uses

II. Automate entire account conversions
- Migration of customer records
- Migration of associated accounts
- Correction of conversion errors

III. Modifications needed for new product roll-outs

IV. Saves time and resources—speed is critical

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My Use of Foxtrot

V.   Item postings

VI.   Error corrections

VII.   New branches—General Ledger accounts

VIII. Branch closings—migration of accounts

IX.   Data breach recovery—TJMax, Target, etc.

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The force of automation at Armed Forces Bank

X.   61 daily scripts

XI.   41 weekly scripts

XII. Lost and stolen cards—includes a 400,000 card base

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The force of automation at Armed Forces Bank continued...

XIII. Military recruit activity

XIV. Charge off—loan and deposit accounts

XV. Return mail—exception handling

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Robotic Process Automation is limitless

XVI. Security maintenance
- Employee changes on all platforms
- First Data, Wire System, Teller System, Core

XVII. Consolidation
- Downsized from six (6) banks to two (2) in July 2015
- Includes merging and changing of data

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Robotic Process Automation is limitless continued…

XVIII. Acquisitions
- Includes setting up new employees

XIX. Retrieval of data from Web
- Interest rates
- Compliance data

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Foxtrot Use Cases

RPA for All Knowledge Workers and Subject Matter Experts

FINANCIAL	HEALTHCARE
Conversions	ICD-10 updates
LOS to Core connector	Update physician credentials
Account maintenance	Update NDC software
Data breach recovery	Maintain Joint Commission and regulations
Update officer codes	Update EMR
Maintain product inventory	Claims processing
Maintain government compliance	Electronic collection letters
Alert customers	Email error alerts
Fee assessment	Perform write-offs

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Foxtrot Use Cases

RPA for All Knowledge Workers and Subject Matter Experts

INSURANCE	MANUFACTURING
Claims processing and adjudication	Monitor product inventory and pricing
Maintain provider information	Reorder parts
Adjust fees	Email alert notifications of low stock
Add new plans	Email reports
Update NDC software	Generate audit reports
Issue credits	Integrate multiple ERP, CRM, HR, and other applications
Maintain Administrative Loss and Medical Loss ratios	Pull or upload files to FTP
Update coverages	Mass update SKU numbers
Electronic alerts to members	Append and merge data

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Foxtrot Use Cases

RPA for All Knowledge Workers and Subject Matter Experts

HUMAN RESOURCES	MARKETING
Employee's benefit selection/options	Web scrape for predictive behavior
Enter employees' insurance/benefits	Web postings
Alert employees of eligibility	Social media updates
Payroll check processing	Integrate customer-facing websites and internal systems
Vacation time accrual	Collect and analyze internal customer data
Vendor cost analysis	Collect and analyze external/third party data
Generate audit trails	Translate languages
Onboarding of new hirers and online documents	Job postings
Maintain employee credentials	Add survey results

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What Does Your Future Hold With Robotic Process Automation?

Working alongside robots…

EFFICIENCY

Thank You for Attending

"This is less about the latest trend in software. It's more about the new digital version of the white-collar worker. It's really a reinvention of how work gets done."

-- Frank Casale, Founder and Chairman Emeritus of the Institute for Robotic Process Automation (IRPA)

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Questions?

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