

A view to the future as SBT Marketing eyes up Robotic Process Automation



CASE STUDY

When SBT Marketing realised that its business information flows were excessively reliant on manual data exchange, it engaged Assurity Consulting to find better ways of getting the job done. With the introduction of a UiPath-powered Robotic Process Automation platform, the New Plymouth-headquartered company now looks forward to a digital future defined by efficiency, reduced administration, and more accurate data across the board.

SBT Marketing (SBTM) is an export business which trades rendered animal by-products to many international destinations from both national and international suppliers and is a subsidiary of Taranaki Bio Extracts.



Situation

Like many companies, SBTM was alerted to process and data exchange inefficiencies by the presence of several canaries in the coal mine. Specifically, explains Sales and Marketing Manager Andrew Bühler, there was reliance on key people to get business information flowing, some processes depended on handwritten information, and spreadsheets were routinely used as ‘bridges’ between various systems.

He notes that reliance on manual data entry meant mistakes were being made, while every month saw the same challenge of running out of time to get financial reports through to directors. “A lot of this came down to cumbersome processes. For example, if a sales contract has been missed in one of the manual processes, either not sent on email, or email instruction misinterpreted or missed, that makes it hard for shipping team to efficiently organize the logistics for moving shipments. This compounds the ability of the accounting team to invoice and make payment when information is neither accurate nor timely. With little systemic reinforcement of the processes, the chances of a mistake or omission are always there.”

While the company independently understood that the information could be templated, taking the next steps proved a challenge. “That’s where we realised we needed the help of a consulting company skilled in digital business solutions.”

“We had a lot of handovers and even had several processes where information started out being entered into a paper-based register, then transferred via email to another person, and then entered into our accounting system,” he explains.

Solution

SBTM engaged Assurity Consulting on the recommendation of an associated company, and after a competitive bid process. The consulting company recommended a phased approach, beginning with a thorough analysis of SBTM’s business processes.

This review showed that in some cases, the same information was being entered four times in different places. It also revealed difficulties in meeting monthly financial reporting deadlines, with information spread across multiple systems, and an excessive dependence on Excel spreadsheets as workarounds for data capture and exchange.

Following the business analysis, the second phase was ‘Design, Build and Validate’, with Assurity developing an RPA platform based on UiPath technology. This phase is complete, with processes including the generation of sales contracts and purchase orders identified and now benefiting from automation.

“An initial analysis indicated that some processes were a good fit for RPA, but we didn’t have much detail. Once Assurity looked at it, we realised the processes were more complicated than initially thought. Most challenging is that much of our information is not binary which means building robotic processes required highly skilled development and in-depth understanding of our business and how things relate to one another,” Bühler explains.

He therefore praises Assurity for its robust approach to the project. “There are a lot of nuances involved in automating a process. If you don’t take note of those, you’ll end up automating the wrong thing. So, it is important to be highly organized to ensure that those notes are conveyed to the developer accurately and are being worked on. The work Assurity put in to understand the business and our challenges really set the scene for initial success.”



Results

Bühler credits the Assurity development team for its clear communication and iterative sprint demos which demonstrated incremental progress while correcting any deviations from intended outcomes. This approach resulted in initial ideas rapidly progressing to Minimal Viable Product and on to a fully functional end-to-end product and a refined RPA in production.

With the delivery of Phase 2, the real benefits of automation are becoming clear to SBTM. Using cloud-based UiPath Apps, a low-code application development platform, SBTM today has production automations running across multiple systems. UiPath Apps works hand in glove with UiPath's Data Service which interfaces with SBTM's relational database, connecting 7 interrelated tables which describe SBTM products.

Upon execution of a deal, the automation creates a sales contract or purchase order, and stores all the information into appropriate databases used for monitoring and managing the business. With an extensive catalogue of products with unique requirements for individual purchasers and specialised packaging for each, built-in business logic means people don't have to remember the specifics to generate a sales order, with the time taken for process execution reduced from **up to 10 minutes, to 1-2 minutes per process.**

Further it provides data-validation in the respect that the data is entered in the same format every single time. This is imperative for future automation and reporting from the company's monitoring and management tools.

Bühler says the initial results are crucial in establishing and verifying the worth of RPA to justify further investment and initiatives. "We've started with the sales contracts and Purchase Orders; we're in the process of validating the results before investing in phase 2," he explains.

As for the already impressive results, Bühler believes there is more to come. "This is the tip of the iceberg in terms of time saving and accuracy. We have big deliverables in terms of what we want to achieve with digitisation, and RPA is going to be part of the journey to accelerate business performance," he enthuses.

He describes the engagement with Assurity Consulting as delivering '100% positive results'. "We've recently gone into production for Phase 1 and I commend the Assurity team for a great job done. They make my job easy because they ask for information, get what they need, and get on with it. And their work is proving how RPA can transform SBTM by making things easier for people, and better for business."



Andrew Bühler
SBTM Sales and Marketing Manager

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At a glance



Company:
SBT Marketing

Industry:
Agriculture

Situation:

- The business information flows at SBT Marketing (SBTM) were excessively reliant on manual data exchange. The organisation has big deliverables in terms of what they want to achieve with digitisation, and Robotics Process Automation (RPA) is going to be part of the journey to accelerate business performance.

Approach:

- Assurity proposed a phased approach, beginning with a thorough analysis of SBTM's business processes. Following the business analysis, the second phase was 'Design, Build and Validate', with Assurity developing an RPA platform based on UiPath technology.

Outcomes achieved:

- Using cloud-based UiPath Apps, a low-code application development platform, SBTM today has production automations running across multiple systems. UiPath Apps works hand in glove with UiPath's Data Service which interfaces with SBTM's relational database, connecting 7 interrelated tables which describe SBTM products.
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