

# 100 Automation Opportunities Across the Enterprise

 Sales and Marketing	 Customer Onboarding	 Customer Service	 Operations/ Compliance/Legal	 Finance and Accounting	 Human Resources	 Information Technology	 Supply Chain	 External- Vendors /Partners	 Cross-Function
Competitive pricing and monitoring	New customer applications	Integration of email, call center and core systems	Screening and risk management	Vendor onboarding and maintenance	Employment history verification	Installations	Supply and demand planning	Vendor/Partner sourcing	Data entry
Market intelligence	Customer due diligence	Call and contact center processes	IP and fraud detection	Vendor portal queries	Employee onboarding	Server and application monitoring	Inventory management	Vendor/Partner qualification	Data extraction, aggregation, integration— websites, portals, documents, systems
Data aggregation and management	Customer data management	Customer data management	Compliance reporting	Funds transfer (sweep)	Employee offboarding	File and document management	Contract monitoring and enforcing	Vendor/Partner onboarding	Report compilation and distribution
CRM updates	Online registrations	Loading detailed customer info for CSR support	Policy administration and servicing	Customer onboarding and maintenance	Payroll	FTP download, upload and backup	Supplier portal integration	Vendor/Partner reviews	Forms processing
List building	New customer eligibility	Service requests and scheduling	Credential verifications	Incentive claims	Time and attendance management	User setup and configuration	Work order management	Vendor/Partner portal integration	Data and content migration
Sales quote automation	News and social monitoring— customer risk rating	Scheduled and triggered customer communications	Licensing and registrations	Pricing comps	Training and education	Application integration	Order processing	Contract monitoring and enforcing	Data cleansing and verification
Invoice creation and distribution	Upsell opportunity reporting	Price matching	Customer due diligence	Sales and purchase order processing	Compliance reporting	Data and content aggregation and migration	Shipment scheduling and tracking	Returns, repairs, recalls	Process monitoring and optimization
ERP automation	New customer welcome packets	Transaction automation	Outside affiliations review	Collections	Employee data management	ERP and other systems integrations	Invoice, quote and contract management	Performance measurement and optimization	Data reconciliation and management
Social media monitoring	Customer engagement communications	Renewal notices	Gifts and entertainment reconciliation	Report aggregation	Tax management	Batch processing	Refunds and returns	Supplier/Vendor offboarding	Cognitive Document Automation (RPA + Capture)
Business intelligence reporting	Customer retention	Customer info and preferences updates	Periodic disclosures	Journal postings	Benefits and stock administration	Synchronizing, deleting and emptying file folders	Freight management	Supplier/Vendor agreement maintenance	Intelligent human and robotic workforce (RPA + BPM)