

ROTH AUTOMATION

BUILDING
TAILORED
EFFICIENCIES
FOR TANGIBLE
RESULTS.



AT A GLANCE

Challenges

- Onboarding times were unpredictable and could take weeks.



"For over 20 years, we've been tailoring technology for enterprises of all sizes.

Our mission is to provide companies with cutting-edge products that enable employees to work smarter."

Jonathan Roth

President & CEO,
Roth Automation

MISSION

Roth Automation develops client-centric solutions to enhance operational agility and exceed organizational goals.

THE OBJECTIVE

Professional Employer Organizations enable businesses of all sizes to operate efficiently by supporting day-to-day HR and payroll functions. When it comes to creating operational efficiencies for the PEO's, that is where Roth Automation excels.

Recently, Roth Automation partnered with a national PEO to streamline interdepartmental workflows, reduce manual data entry, improve quality assurance and ensure compliance. In doing so, the process reduced touchpoints across teams, increased data accuracy and reduced total turnaround time by more than 75%.

ROTH AUTOMATION

AT A GLANCE

Challenges

- Manual keying errors caused delays that would impede onboarding process for various departments.



THE CHALLENGE

The challenge for the Professional Employer Organization started with the onboarding process and the downstream impact of inefficiencies. As the PEO grew and acquired additional clientele, the process of entering data remained unchanged over years of technological progression.

Team members manually keyed customer data into a CRM to perform background and credit checks. Payroll tax and other employment guidelines vary by state and are subject to change based on a variety of factors. At different points throughout the process, interdepartmental staff waited for notification that the prior step was completed before progressing to the next stage.

Time spent validating information became an obstacle to efficiency and growth. At each touch point, if data was entered incorrectly, the system would error and incur additional delays in processing times.

The time associated with onboarding was unpredictable and could last over the course of several weeks. Any information that did not match between systems would cause errors, and add delays to the onboarding process, requiring manual intervention to correct.



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Benefits

- Return on investment was realized within ten weeks of implementation.



THE SOLUTION

The onboarding team sought to reduce total process time, increase accuracy, and eliminate manual data entry. Roth Automation's team of developers collaborated with the PEO team to record the standard process and understand each department's objectives. After determining the scope of the project, business rules, and volume of data, the developers built a high-level prototype of the solution architecture to demonstrate operation and efficiency. The preview provided a visualization for stakeholders to get a feel for the design and functionality.

Next, developers established a robust and scalable framework. Developers focused on an ergonomically efficient solution with an open API to scale for periods of high-volume engagement. The solution leveraged industry leading OCR technology to effortlessly extract data from semi-structured formats. This was layered with process orchestration, data validation and advanced logic for compliance and data accuracy. Due to the wealth of experience in the development team, the solution was completed within projected timelines and did not exceed budget.

In the end, the solution provided greater visibility into the onboarding process and reduced end to end processing by an excess of 75% of the original time. The client team was pleased with the results and scoped out additional projects to increase efficiency and agility throughout the organization.



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