

Reducing Customer Onboarding from 3 weeks to 8 hours

Industry: Food Service Distribution



Challenge

A leading food distributor servicing restaurants, the healthcare industry, and schools wanted to pilot a digital-only customer onboarding system to decrease the amount of time it took to set up a new customer, from initial contact to first order. Before the pilot, this initial setup could take weeks, not providing an ideal customer experience. This was partially due to a large number of legacy systems as well as SAP that needed to be updated with customer information.

"They gave me a demo of the customer onboarding solution your team members developed and all I can say is HOLY COW! It is remarkable that 2 folks were able to build such a robust, easy-to-use, and operational solution in just one PI. Normally it takes months to get a single integration done; Macedon, together with our team, was able to do a handful in a matter of weeks."

— Software and Analytics Team Manager

Solution

The solution was to design a system that would be able to update the many standalone systems and SAP with the data the customer entered in a hands-off fashion. To accomplish this, we looked at making Appian the orchestrator of the onboarding process. The customer data would be reviewed in an Appian task at the start. Then Appian would automatically create the data needed in SAP and send the data to the other legacy systems. The Macedon team designed the Appian process to perform automated back-and-forth communication with all other systems in parallel where possible and sequentially when some systems needed to be updated before others.

This meant being able to make a large number of integration calls simultaneously, then being able to receive confirmations from those systems all sending several confirmation messages to Appian for different

Solution

customers at the same time — proceeding when all of the required confirmations for each customer were received at each key stage of the orchestration. At every point in the process error handling was put in place so if an issue occurred either from Appian to another system or vice-versa, someone would be able to intervene, correct that step in the process, and allow the rest of the process continue.

The sequential but parallel processing was especially crucial with the SAP integrations as the data needed to be created and modified in stages. The first step was to develop several lower-level business partners, then the top-level business partner, and finally, modify the top-level business partner to link back to the lower-level business partners. If this task were completed manually by an employee in SAP, each business partner would have had to be individually created one at a time, then linked one at a time. We could create multiple business partners simultaneously to save time through the Appian process. For the situations where it still had to be sequential, it was significantly faster than doing it manually since Appian was sending the entire large dataset that was collected up front to SAP rather than entering it field-by-field.

Upon release, there were no integrations available to send data to SAP. To get around this limitation, the team used an RPA solution to enter data into SAP automatically without user input. Like the integrations, the RPA processes had error handling, so if something did go wrong, a reviewer could go into SAP, fix the issue, then continue the process. Eventually, all of the RPA-backed SAP work was replaced by SAP integrations.

Still, it was an essential tool in our toolbelt to enable us to provide a COS MVP without having to delay the launch due to integration development timelines.

The Customer Onboarding System (COS) application that provided the solution mentioned above was built for a targeted Digital-Only pilot launch in a little over a month. After a successful go-live, there was interest in expanding COS past the digital-only model to onboard credit customers who would come from a larger geographical area and require more extensive data manipulation on the initial Appian task. Therefore, COS was expanded to add the credit part of the app with a similar orchestration to the original digital-only solution but allowing for multi-stage approval on the initial review task as well as more complex data manipulation before sending the data off to the other systems.

Result

By simultaneously updating SAP and several systems with new customers' information in an automated fashion, the COS application was able to save 5.75 million hours in customer wait time in 8 months of being live. The process of onboarding a new customer was reduced from 3 weeks to 8 hours. The pilot regions of the digital-only part of COS continue to expand, and several hundred customers have been onboarded in a year and a half from going live. On the credit side, over 20,000 customers have been onboarded in a little over a year from going live. With COS live, customers wait significantly less time to be onboarded, and employees save a significant amount of time by not having to navigate and update a wide array of systems.



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About Macedon Technologies

Macedon has improved business processes and developed automation software since 2009. We offer first-class intelligent automation to evolve the way businesses work and achieve better outcomes. We help organizations connect technology to their core business model while aligning it with the marketplace and their culture.