

# HOW AUTOMATION HELPED AN ENERGY FIRM COMPLETE FINANCIAL PROCESSES 3X FASTER

Find out how a leading energy firm streamlined complex financial reporting and audits by leveraging automation to boost accuracy, compliance, and operational efficiency.

# About the Customer

A leading North American retail energy provider serving residential and commercial customers with electricity and natural gas solutions. The company operates across multiple deregulated markets, focusing on sustainable supply options, competitive pricing, and improved customer experience through technology-driven operations.

## Engagement Story

The energy firm faced significant challenges in preparing trial balance reports and conducting account write-off audits. Multi-level permissions, complex data extractions, and repetitive manual tasks consumed excessive time, leaving reports prone to errors. Back-office operations struggled with a lack of IT expertise, leading to delays in non-client-facing functions.

With mounting inefficiencies and the inevitability of human error threatening accuracy and compliance, the client recognized the urgency to act. They sought a trusted partner who could quickly understand the criticality of these processes and bring in the right digital and technical expertise to streamline operations.

Complex reporting steps, repetitive audits, and limited IT support strained resources and increased error risk, impacting the accuracy and speed of critical financial operations.

# Key Business Challenges

The customer faced operational hurdles that strained resources and impacted accuracy across critical financial processes.



## Complex Report Process

Multi-level permissions, accessibility sanctions, and manual data extraction across numerous accounts made the preparation of trial balance reports highly time-consuming and resource heavy.

## Risk of Human Error

Repetitive clerical tasks, manual account audits, and write-off activities exposed the process to errors, where even small mistakes could compromise the accuracy of entire reports.

## Back-Office Inefficiencies

The lack of IT expertise and overutilization of resources in non-client-facing functions slowed down back-office performance, diverting focus from more strategic business activities.

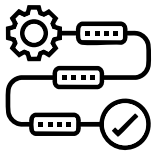
# Desired Goals

The client aimed to streamline financial processes and boost efficiency by reducing manual intervention, optimizing reporting, and freeing resources for strategic activities.



## **Reduce Manual Effort**

Minimize dependency on manual tasks such as data gathering and account write-offs to cut down errors and resource strain.



## **Streamline Reporting**

Simplify and accelerate the trial balance process by reducing the frequency of system access and manual data handling.



## **Improve Resource Focus**

Free up valuable bandwidth from clerical activities, enabling teams to focus on core business and strategic initiatives.

By automating data gathering and account write-offs, simplifying reporting, and reducing clerical workload, the firm aimed to redirect resources toward strategic, high-impact initiatives.

# Solution

EvonSys leveraged its expertise in Pega Robotics to automate critical financial processes, reduce manual effort, and enhance efficiency for the client.

## **Automated Report Generation**

Deployed Pega RDA to automate Trial Balance report creation and write-off processes, reducing human intervention by 90%.

## **Virtual BOT Deployment**

Set up BOT machines to handle data extraction across multiple applications, replacing manual access.

## **Optimized Trial Balance Process**

Eliminated redundant steps, enabled bulk data extraction, and reduced the frequency of system access.

## **Bulk Report Handling**

Configured automation to process bulk reports and store them in a central location for easy access.

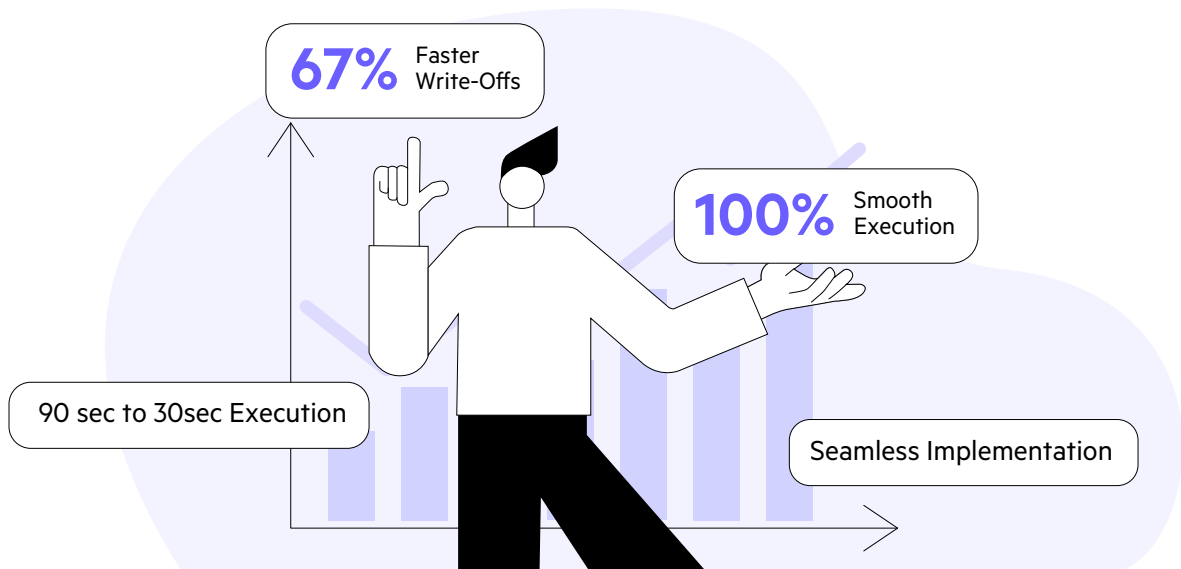
## **Collaborative Implementation**

Engaged Pega Robotics experts to design, implement, and refine the solution through close collaboration with the client team.

Pega Robotics automation streamlined financial workflows, cutting manual effort by 90% and enhancing speed, accuracy, and efficiency.

# Business Outcomes

The engagement delivered measurable improvements in speed, efficiency, and accuracy, enabling the client to optimize resources and enhance financial processes.



## 2-Month Delivery

Project completed within two months, meeting all proposed timelines.

## 67% Faster Write-Offs

Automated solutions cut write-off processing time by 67%, freeing up significant resource bandwidth.

## 90s to 30s Execution

Write-off processing time reduced from 90 seconds to 30 seconds, ensuring faster and more reliable outcomes.

## Seamless Implementation

Certified Pega Robotics experts ensured 100% smooth execution with reduced manual effort.

Automation accelerated write-off processing, cutting execution time by two-thirds and delivering faster, more reliable financial outcomes.

# Start your Automation Journey with EvonSys

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