Removing growth obstacles with robotic process automation

Cobmax cuts back-office operations in half with RPA

by Christina Allsop

5-minute read

I n 2016, Cobmax Sales Center, a telemarketing, sales and customer service provider based in São José Do Rio Preto, Brazil, faced an unexpected dilemma. Cobmax had just won a major contract to handle customer calls for one of Brazil's largest telecommunications companies.

The growth opportunity for the young company was tremendous. But it soon became clear that the company's outdated and manual administrative systems threatened this growth.

Founded in 2008, Cobmax had expanded rapidly. By 2016, it had

approximately 200 salespeople working in its call center. With the new contract, the number of sales calls quickly increased. For each call, sales staff had to enter customer information into Cobmax's customer relationship management (CRM) system. The company then had to transfer that information into each of its clients' CRM systems.

This is where the back-office team came in. Nearly 50 employees worked full-time in the back-office, cutting and pasting information from one CRM into another. However, with the increased number of calls, they could not keep up.

The employees worked longer hours, sometimes until 11:00 PM, which required overtime pay. Even so, reports to Cobmax clients were often delayed because of mistakes resulting from manual entry. At times, clients received invoices with varying amounts, which led to confusion and long phone calls with Cobmax service staff.

"We knew something had to be done, and quickly," says Alexandre Voltan, Innovation Manager at Cobmax. "In spite of our best attempts, costs and errors were increasing. If we wanted to keep growing, we needed to streamline our back-office systems."

Sales consultants sell more than

20,000

products every month

Client reports that required 2-3 days to complete now take just

1 day

Unexpected benefits

With this in mind, Cobmax management asked IBM for help in solving the problem. Within days, the IBM team met with the company to review problems and solutions, including IBM® Robotic Process Automation (RPA).

After this meeting, IBM provided Cobmax with a proof of concept (PoC) that included a demonstration of a working RPA process. This demonstration was exactly what Cobmax management needed to see. "The demonstration showed us that RPA technology would not only solve our problem, but it could also do far more than we thought," recalls Voltan. "It became clear that we could scale this technology. That made the decision to work with IBM an easy one."

IBM and Cobmax management began the project by carefully reviewing the company's administrative processes. As a result, they discovered several repetitive or error-prone tasks that were good candidates for automation. The team also documented every process, something which Cobmax had not been doing.

This review resulted in further, unexpected benefits for Cobmax management. Voltan explains: "We now realize how important it is to make a process as simple as possible before you automate it. And documenting everything ensures processes are clear and done correctly. This is something we had never done before working with IBM."

Cobmax chose a hybrid solution for the RPA technology, which runs the analysis in the IBM cloud, while the bots are located on computers in Cobmax offices. This software-as-a-service (SaaS) solution allowed the company to get the entire process up and running in about two hours. Cobmax also saved money, since it had no start-up costs, and there was no need to invest in server hardware or software. Plus, locating the bots in Cobmax offices makes it easier for the company to ensure compliance and monitor the RPA process.

The company also asked IBM to train Cobmax staff in using the new RPA technology. Voltan explains why: "Our company prides itself on helping our employees feel empowered to learn and grow in their work. And the training IBM provided helped our employees feel more comfortable with the automation process. It made implementation easier for everyone."

" In 2016 we started with a little seed. We had only one process to improve, a simple cut and paste. Today, we have a team of five developers, a technical leader and a process owner inside Cobmax, hired by us, and we are automating a wide range of processes."

Alexandre Voltan, Innovation Manager, Cobmax Sales Center

One solution solves several problems

It didn't take long for Cobmax to see the benefits of RPA. The bots saved the company so much time, it was able to reduce back-office operations by 50%. Employees used the time saved to learn new skills and contribute to Cobmax in other ways. Some moved into sales or customer support. Others had opportunities to use their education and were promoted to strategic areas such as marketing and IT.

Cobmax clients also benefited. Errors decreased significantly in client reports. By moving more people to the sales center, staff could handle more calls at a quicker pace, which also increased

client satisfaction. "For example, requests for client reports used to take two or three days to run," says Voltan. "We now turn these reports around in

one day. So, we are delivering faster and more predictably than in the past, with fewer headaches for our clients."

For Voltan, it was also interesting to see how the attitude of Cobmax employees evolved through the implementation. "At first, staff were very worried when they heard about the bots," he says. "Many thought they would lose their jobs. Even after their training with IBM, staff were doubtful. They questioned how a bot could read and interpret information. They felt the bots would never be able to do their work."

Today, staff see the full benefits of RPA. "When they look at a new process now, they immediately start wondering how we can automate it," Voltan continues. "Our employees now see that technology can actually enhance relationships and make their jobs more fun."

The onset of the COVID-19 pandemic also showed how important it is to automate processes. "We were able to respond quickly to the pandemic,"

recalls Voltan. "Within five days, we had more than 300 employees working safely from home. And it's helping us stay connected."

When Cobmax first contracted IBM, management thought it would be for one task. But their eyes were opened as soon as the bots started working.

They realized that automation could help several areas of the company work faster and save money.

"When we started, IBM developed all processes for the bots," Voltan explains. "But when management saw the number of possible projects for RPA, we decided to form an internal team to handle everything. Today we have a team of five developers, one technical leader and myself. Of course, IBM continues to provide us with support and training whenever we need it."

Cobmax management is excited about the future and about working with IBM. "With IBM's help, we look forward to bringing in even more innovative technology," says Voltan. "Now, the only question is how far will it take us?"

" We've always viewed ourselves as a technology and a sales company. That's why working with IBM was such a great fit for us in 2016—and why we're so excited to continue working with IBM in the future."

Alexandre Voltan, Innovation Manager, Cobmax Sales Center

About Cobmax Sales Center

Cobmax is a sales call center in São José do Rio Preto, Brazil. Founded in 2008, its more than 500 employees manage sales, customer service and telemarketing calls for some of Brazil's largest telecommunication and insurance companies.

The client featured in this case study initially engaged with WDG Soluções Em Sistemas E Automação De Proces LTDA, which began conducting business as IBM on January 1, 2021. The WDG products in this case study, WDG Studio and WDG RPA, are now known as IBM RPA Studio and IBM RPA Solution, respectively.

Solution component

- IBM® Robotic Process Automation