



USE CASE: FINANCE + ACCOUNTING

EDF Energy Uses RPA to Drive Continuous Improvement in its Financial Shared Service Centre

The Financial Shared Services Centre is at the heart of EDF Energy. It provides transactional accounting services across the company's retail electricity, generation, nuclear and renewable energy businesses.

EDF Energy is the largest supplier of low-carbon electricity in the UK. The company employs around 12,500 people and is the country's biggest producer of electricity by volume, as well as the largest electricity supplier to UK businesses. With this and more than five million domestic product accounts, effective financial operations are a key part of delivering an excellent customer experience. The Financial Shared Service Centre must deliver highly efficient operations to meet the needs of EDF Energy's businesses.

Robert Gilhooly, Director of the Financial Shared Service Centre, explains: "Continuous improvement is vital to us, but there are only so many ways that you can make a



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process more efficient and cost-effective. We realized that robots would allow us to automate many repetitive parts of our processes and support our staff by removing some of the mundane activities from their workload. We had been watching RPA technology, and it seemed sufficiently robust that we felt it could deliver the benefits we were looking for.”

Selecting the Right RPA Solution

There were two key criteria EDF Energy considered in selecting an RPA solution: First, it had to be affordable so that the Centre could start small and grow cost-effectively over time. Second, it had to be easy to use so that the team could become self-sufficient quickly. After evaluating the market, EDF Energy selected UiPath.

“Unlike other vendors where we were looking at buying multiple licenses, UiPath allowed us to purchase a single robot and then add robots one at a time after that,” Gilhooly said. “This made it very affordable for us to move into proof of concept and pilot stages quickly. Also, UiPath seemed very straightforward to learn, and the company offered excellent training and support to enable us to build our RPA capability.”

Robots saved EDF Energy
more than
\$126,000
in software license and development
costs by eliminating the need for a
new planning system.

Automating eight processes
achieved an estimated
6x return
on investment
of time and money.

70 man-hours
saved per month during the pilot stage.

Getting Started

The Centre wanted to build a proof of concept that could also be rolled out into a live system to deliver enduring value to the company. After discussions with the management team, the process for handling manual journal entries was selected as the pilot. It was labor intensive and involved several different systems—including ERP, spreadsheets, email and shared network folders—to complete.

A journal records every financial transaction that's made within areas such as sales, purchases, and payments. Every time a new transaction was entered into a journal, it had to be reviewed by a member of the Centre's team. If it was correct, it was entered into the company's ERP system or returned to the originator if incorrect. The ERP system would also check for errors and reject if any were found. This process was repeated until the entry was correct and the team member could park the entry for another team member to approve and post the updated journal.

For a company like EDF Energy, there are a substantial number of journals being created and amended, with activity often concentrated around the end of the month. The team found that **the journal entry process consumed 70 man-hours each month, but as this was mostly concentrated throughout a week, it took the equivalent of two staff working solidly on this one task.**

The Centre worked with PwC to develop a robot that helps automate parts of the process. The team member still reviews the new journal entry, but the robot now picks up the entry, automatically checks that it is in the correct format for the ERP system and inputs the entry.

If there are any errors identified by the ERP system, the robot takes a screenshot of the error and emails it to the originator. If the entry is correct, then the robot posts the journal.

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Robert Gilhooly, Director of the Financial Shared Service Centre

Learning to Benefit from RPA

The pilot was live within six months and proved that UiPath robots were able to easily work with multiple systems and provide good support for the Centre’s team. The relative ease of developing routines for the robot means that it is now processing double the volume of work that was initially expected. The first robot has performed so well that the Centre has purchased a second robot to help process its workload more efficiently during peak times and to meet the interest from other support functions for RPA services.

“Using UiPath, we have flexibility as any process can be applied to any robot, so we can deploy workload as we require,” Gilhooly said. “In addition, our extra robot allows us to cope when the volume of a given process suddenly increases exponentially.”

The pilot also proved how easy UiPath solutions are to learn and use. At the same time as PwC was developing the initial proof of concept, the Centre hired its own “robot wrangler.” The intention was for the Centre to become self-sufficient over time but it had, in reality, become self-sufficient by the time the pilot was delivered.

“The choice for our robot wrangler came down to someone with RPA experience or someone with little knowledge of robots but incredible curiosity and the willingness to learn,” Gilhooly said. “We chose the latter, and it’s probably one of the best decisions we made. Our new staff member was up to speed with RPA in two months and started to look at how robots could be applied to other things we do. They have told me, ‘The great thing about UiPath is its advanced features that allow you to take automations even further, so you can focus on innovation and not worry about software limitations.’”

This ability to apply robots to new challenges has quickly become important for the Centre and beyond. Once the staff learned that robots could help them do their job more efficiently and allow them to focus on the skilled, knowledge-centric aspects of their role, they have been quick to suggest other processes where robots can bring improvements.



Discover how you can take your company's finance and accounting services to the next level. Learn more about the UiPath solution: [UiPath Studio](#), [UiPath Robot](#) and [UiPath Orchestrator](#).

You can also [contact our sales team](#). We are here to provide you with more information, answer your questions, and create for you an effective automation experience.

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Reaping the Rewards

The Centre has found the robots to be most productive when they remove tasks that burn a good deal of time from a staff member's day. It has focused on processes where there is wasted time as a priority for automation. The eight processes that have been subsequently automated include the transfer of Accounts Payable data directly into the ERP system and tax where data had to be gathered from different systems before analysis in support of tax calculations could be undertaken.

“Looking at the tax calculations, it would take up to four hours to pull all the data together to start the actual analysis. A member of staff could begin the data collection process at 9 AM, and by 1 PM they were ready to begin the actual work. **Now, the robot can do all the data collation over-night, and the staff member has the data at their fingertips to be productive as soon as they reach the office,**” Gilhooly said.

In all, Gilhooly estimates that together the eight automated processes have delivered a six times return on investment regarding time and money. In the case of a new planning system, applying RPA has saved the company over £100,000 (\$126,000) in software and development costs. The robot has removed the need for data interfaces to the new system and has the flexibility for the company to rapidly change the data feeds—such as adding a new field—quickly and cost-effectively without affecting operations in any way.

The success of RPA within the Financial Shared Service Centre is beginning to bear fruit as the Centre's activities have attracted interest from other financial functions, as well as the IT and HR departments.

“Once other functions understand the benefits they are keen to discuss how the robots can help improve their processes. We're now at the point where we have to carefully manage expectations, so we can continue to build on our achievements and bring the potential of RPA to more people across the business,” Gilhooly said.