



Lawrence & Wedlock Customer Use Case “Automating Payroll”

PAYPLUS



Payplus selects automation experts Lawrence & Wedlock to accelerate transformation

How to scan the QR codes in this document:



Smart Phone
Have your mobile handy.



Apple Users
Open the camera app and scan!



Android Users
Download a QR code scanner app and scan away!

With Robotic Process Automation long being the preserve of the really large multi-national enterprise, Payplus didn't feel that this exciting automation technology would be something they could benefit from, let alone embark on a successful scalable automation program across their business. However, a new service provided by Lawrence & Wedlock is changing this reality and bringing world-class, leading-edge transformation solutions within everyone's reach and providing an edge for SME's to compete like never before.

Payplus (www.payplus.co.uk) is a UK based payroll bureau who provide top quality payroll services to small and medium-sized businesses, including the education sector.

Outsourcing their payroll allows employers to free themselves from the burden of their payroll obligations, enabling them to get on with more profit-orientated tasks whilst Payplus is committed to getting their clients' payroll completed accurately and on time.

In its current form, Payplus has been providing payroll services since 2008. Each month, the current business runs around 1000 payrolls, processes approximately 50,000 payslips and pays £400 million per annum through the Bacs system on behalf of clients.

Paul Marsden, Founder of Payplus explains: "Payplus also processes payrolls for a number of accountants, taking their clients payrolls and dealing with the time consuming and increasingly technically complex aspect for them. The introduction of the Furlough scheme was the last straw for many accountants in terms of payroll, coming on top of having to cope with Pension Automatic Enrolment. As a result they have sought to outsource the payroll aspect of client work".



www.payplus.co.uk

Finding New Solutions for New Problems

Following the outbreak of the COVID-19 pandemic, Payplus not only had to continue supporting their clients with a workforce that was working remotely, but they had to very rapidly assimilate additional and new payroll tasks for those clients, such as the Coronavirus Job Retention Scheme Furlough claim.

The job of managing all of their clients' Furlough claims and repayments on time and accurately was no small task, but it was also critically important to ensure that Payplus could help those companies receive the much needed cash to sustain their businesses during lockdown.

Although Payplus uses best in class industry applications to run their clients' payroll, there are always some tasks which simply can't be made

more efficient or scalable or where connectivity isn't possible, and there is always an ample use of spreadsheets, all of which result in high amounts of manual, repetitive and error-prone work. As a tech-savvy company, Payplus knew there had to be a better way of working and deriving more productivity with higher quality and compliance, whilst being able to focus more time on their clients. One day, they learned that "robots" had helped another company do exactly this, and they decided to investigate further.

One of Payplus clients shared with them how they had recently automated some month end invoice processes, shaving 6 days off their close cycle and reducing manual work by 20 hours per month and that they had also just had their Furlough claims fully automated too. Naturally, Payplus were intrigued, so their client recommended them to contact Lawrence & Wedlock to see if they could help.

Begin at the Beginning... but with the end in mind

Payplus wanted, firstly, to see if the Furlough process could be even partially automated to reduce the tens of hours required every month during lockdown for key personnel whilst ensuring quality, accuracy and compliance at all stages. Payplus also then wanted to understand if a very repetitive, manual and time-consuming invoicing process could be improved, and reduce the 10+ working days it took to complete manually.

If these two outcomes could be successful, Payplus would feel confident that a great deal more activities could benefit from robotic process automation, which in turn would bring benefits for their clients and employees alike.

So the Furlough Bot Pilot was the agreed starting point – Priority, Importance, Impact! Luckily, Lawrence & Wedlock had already developed a reusable almost “off-the-shelf” solution that already worked and needed only minimum configuration for Payplus to use. So the teams connected and collaborated to gather the necessary HMRC account and client information and confirm the process to be followed. Thirty minutes later, this was done and the Payplus Furlough Bot was ready to start work. The first few transactions were run, then checked, and double-checked...and it had worked, with 100% accuracy, 99% faster and an emailed a status outcome report. And it was ready for more.

Sadly for key staff at Payplus, each employee record claim had been painstakingly and manually entered into the HMRC portal, and also required careful checking and validation to ensure errors and mistakes were corrected, which can easily happen with hundreds of manual records to enter.

The first step in the process is to navigate to the HMRC furlough claim site URL and log in using the correct agent and company credentials. RPA is incredibly secure when it comes to log-ins and passwords, and doesn't require any sensitive or private information to be revealed.

The next step was to enter company specific information followed by the individual employee claim information, one-by-one (where claiming for less than 100 employees). This was finished by adding more company and payment information and confirming the data entered was correct before finally submitting. The robot was also

programmed to capture a success or failure outcome result, notify key personnel accordingly for exception handling and then move on to the next company to process their claim. And the process would be repeated daily as more and more Furlough claim requests came in.

One additional complication to overcome, due to the Furlough scheme being so new, were the constant modifications and changes being made to the HMRC portal webpages. This, however, wasn't a major problem for the Furlough Bot, as the changes were accommodated in minutes, tested and ready to go again. More traditional integrations or automations wouldn't be able to so readily adapt and reconfigure, especially with so many discreet variables and possible outcomes.

During the entire lockdown period, the Furlough Bot process was operated once every day to enter, validate and submit client Furlough claims with the speed and quality demanded by Payplus and their clients. In total, the Furlough claims were taking approximately 3-4 hours per day to process manually, or roughly the equivalent of half a full time person, and the Furlough Bot managed this in just a few minutes.

Success and on to the next

The long, manual invoicing process was next, which had the potential to reduce manual work so significantly. The laborious process involved extracting and reading data from multiple systems, importing into spreadsheets, and then manually adding, filtering, manipulating, updating and validating against other sources before arriving at a final monthly invoicing file, roughly 12 days later. This was all managed by a sole employee, so the invoices could finally be sent to clients for payment.

The process was first thoroughly understood, documented and a robotic solution designed – this was the hardest part, and relied on extracting decades of knowledge and experience from Payplus staff. The build and test phases quickly followed, and the moment arrived to go-live...which was thankfully uneventful and equally delightful for the lady who would no longer have to endure this terribly time-consuming, boring and repetitive task. Automating this manual processing effort reduced the invoicing preparation cycle by almost 12 days, taking only 2 hours to run.

These manual time consuming process activities have been not just automated, but effectively eliminated from a human perspective. There is even more opportunity to broaden the scope of process automations further in future, to reduce manual work, enhance the customer experience and facilitate business growth and new client acquisition.

The Furlough Bot is expected be in use until at least May 2021. The automated invoicing process runs every month, diligently, quietly and without drama and has enabled the time for a fundamental rethink about other work activities that could be performed in the future, and what opportunities exist with this new art of the possible from RPA.

Resilience for the what the future holds

Lawrence & Wedlock are continuing to support Payplus to discover and evaluate other process activities which are suitable for automation and to explore how the future of work could shape new growth plans, exponentially improve business processes and free experienced staff to better service clients. One area of the business already identified with huge potential is to utilise RPA to bridge the unfilled gaps between internal systems like Xero and from those systems to external sources like HMRC and The Pensions Regulator.



lawrenceandwedlock.com

Contact Lawrence & Wedlock for
more information:

<https://lawrenceandwedlock.com/contact-us/>

