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Business Domain	**Project Type**
Digital Workforce	Automation of the CRM system

A Fitness Solutions Company Automates Major Processes Using RPA in CRM

Client

With deep industry knowledge and decades of fitness experience, the Client offers the most proven club management solution in the fitness marketplace. The Client's holistic solution includes an innovative SaaS platform, top-notch Revenue-cycle Management, and an unwavering commitment to customer service.

Project

Optimization of the Client's CRM system. Each process is implemented with a custom project template, which allows to avoid a lot of exceptions, decrease the number of unprocessed items, and reduce the development time.

Objective

The CRM system the Client uses has a lot of operations that are simple, repetitive, and can/should be automated to economize user time and make CRM usage more efficient and convenient.

Team Reinforcement

The huge CRM that the Client uses required automation to save users' time on routine operations. The company didn't have expertise in this field. RPA engineers were provided by Intetics.

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Challenge

The Client's company was founded in 1981. It has offices in Little Rock (Sherwood), Arkansas, and Dallas (Frisco), Texas, and it partners with nearly 16,000 health clubs and 150,000 fitness professionals. The Client is a part of the Thoma Bravo portfolio of companies, a private equity firm based in San Francisco and Chicago.

The Client's software had a lot of repetitive processes. If they are automated, it will save a lot of time and effort.

The Client can't execute automation without additional help from software engineers. Intetics was able to form the team capable of handling the job.

Quick Facts

✓ 10 years of continuous cooperation

✓ 20+ Processes automated

✓ Innovative SaaS platform, top-notch Revenue-cycle Management

Technologies

UiPath / UiPath Orchestrator Cloud / MS SQL Server / VMWare / GitHub / PowerShell / Exchange Web Services Managed API / VBA / Office suite

Solution

⭐ **01**

More than 20 global processes were automated.

⭐ **02**

Some processes start every day with a time schedule. Some start with another trigger, i.e., an email is received in a special mailbox, and the job is automatically triggered.

⭐ **03**

Each process is implemented with a custom project template, which allows to avoid a lot of exceptions, decrease the number of unprocessed items, and reduce the development time.

⭐ **04**

Each process has a lot of free analytics options. There is a database on the customer side, which contains information about all executed jobs and allows a deep analysis to be provided.

⭐ **05**

The benefit of this approach to analytics and common UiPath tools is that this info doesn't require licenses, and it won't disappear after some period of time (UiPath cloud-based orchestrator stores logs only for 30 days).
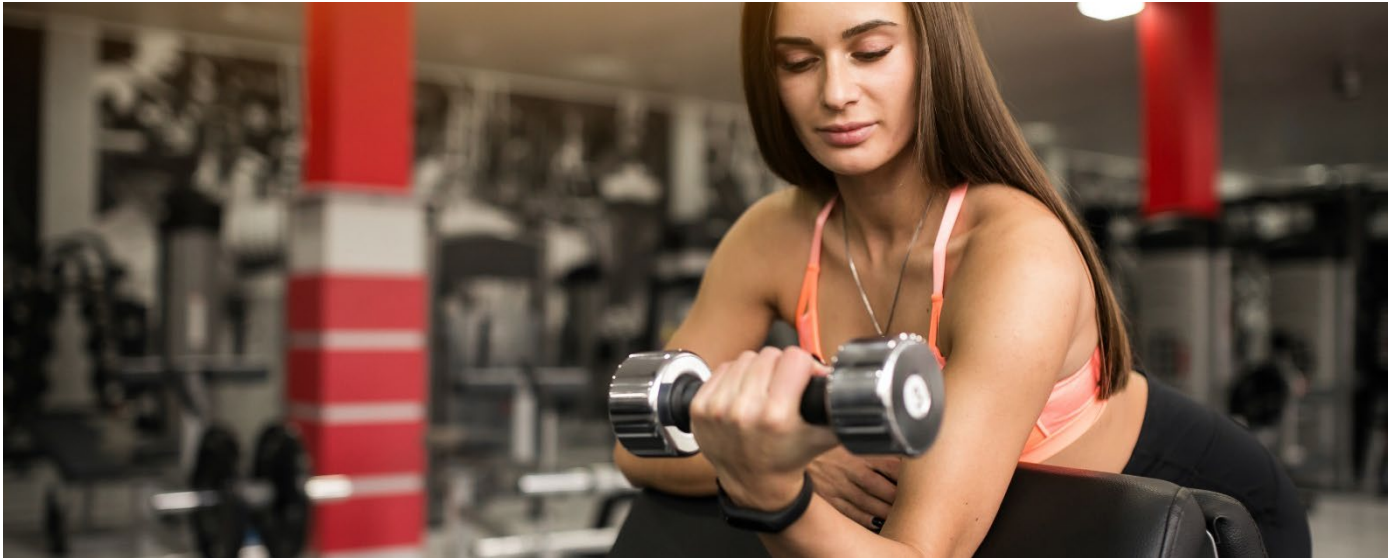
Client Reference

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With the help of automation that was performed by the Intetics team, we saved a lot of costs and time while our system was used. Investments in automation were worth it.

Senior Engineering Manager

Benefits and Results

★ Agents will always know how many items were processed or unprocessed and the reason why they were unprocessed.

★ Administrators will be automatically informed as soon as possible if any jobs fail.

★ All processes are created with special project templates based on the state machine.

★ First automation processes were implemented and executed in a few months after project kick-off.

Techstack:

UiPath, UiPath Orchestrator Cloud, MS SQL Server, VMWare, GitHub, PowerShell, Exchange Web Services Managed API, VBA, Office suite

Team: 5+

RPA Developers