



## Capital One Onboards One Card Customers With Robotic Process Automation

*“West Coast Consulting Group helped us bring down our data entry error rate by 50%, which reduced credit card cancellations by 27% .”*

**Tia Alexander, Commercial Card Leader**



### ORGANIZATION

Capital One

### INDUSTRY

Financial Services

### HEADQUARTERS

McLean, Virginia

### SUMMARY

- Performed strategic assessment
- Crafted strategy and implementation plan
- Created business use cases
- Reformatted OI and UW forms
- Designed Bot to match business use cases
- Wrote test scenarios for testing bot functionality end-to-end

### Challenge

Capital One, the 8<sup>th</sup> largest commercial bank in the U.S., is specialized in credit cards, auto loans, banking, and savings products for retail and corporate customers. Capital One needed to streamline their process of onboarding new corporate card holders for their One Card program.

Capital One issues about 100 new corporate cards a week, using Salesforce to manage the accounts. For each case, a variety of forms, operational instructions, and underwriting documents had to be created by the sales team. Not all forms were of the same format or the same version. Depending on the type of the account being set up, the number of forms varied, and based on the number of members on a corporate account the information varied as well.

Database administrators were entering information manually into a homegrown database, increasing the risk of errors. This could lead to shipping credit cards to the wrong address, or to members receiving cards with incorrect features. The manual process was impacting the quality of customer support and made it hard to scale operations.

### Solution

West Coast Consulting Group was tapped to provide strategic advice on design and implementation of Robotic Process Automation to eliminate the manual data entry. The project scope involved automating the data entry process for new corporate entities and its members when approved for One Card.

A team of RPA consultants spent five months gathering detailed information from the business team to create use cases for the One Card business and implementing a bot designed to handle these use cases.



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West Coast Consulting Group created detailed design documents for the bot. They integrated the bot with Salesforce and created list views to identify and process the correct accounts. Existing forms were mapped to the screen sequence in the database for the bot to transfer information from operational instructions, underwriting, and other forms. Sequencing of the database screens to the correct fields on the various forms mimicked human actions that would be performed by the bot.

The consulting team prepared and deployed test scenarios to analyze and test various use case scenarios verifying bot actions on the database screens. They proceeded to take the system live into production.

## Results

Since the implementation, Capital One has been able to process onboarding of their corporate One Card clients at a faster pace and wider scale. West Coast Consulting Group ensured that the launch went without any issues. One Card's business unit was able to increase the number of corporate clients it processed during the week, while freeing up four full time resources to focus on other areas of the business.

The number of data entry errors declined by over 50%, while recalls or cancellations of credit cards from corporate clients decreased by 27%. Overall customer service quality improved significantly and the number of inbound service requests to call center representatives decreased as well.