



## RPA in Marketing: Agency Achieves **90% Efficiency** Gains in Paid Ads Management

### Client Profile

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Our client is a fast-growing, venture capital-backed technology firm based in the U.S. offering business management and marketing software and services for nearly 15 years. Its award-winning, centerpiece software provides professional marketing services through a single, powerful, integrated platform – helping customers build websites, track reviews, manage leads, enable payments, manage digital marketing campaigns, build a social media presence, and more. Ranked among the Inc. 5000 fastest-growing private companies in America for seven straight years, the company now boasts 600 employees and is focused on helping small and medium-sized businesses grow.

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### BUSINESS CHALLENGE

As part of its centerpiece platform, the client helps customers build brand awareness, capture market share, and establish social-proof by running ad campaigns on primary social platforms. Its service involves writing, designing, managing, and optimizing customers' ads so they can run in ideal positions on ad channels like Facebook, Instagram, Waze, LinkedIn, Google Ads, Bing, Vistar, Snapchat, Microsoft Ads, and YouTube.

Surging demand for its service left the client struggling to add new accounts fast enough to keep up with its rapid growth, with a **manual account creation process that could take up to 10 hours per account**. To run a successful, integrated marketing campaign across multiple platforms through the client's software, every new initiative requires a customized setup that incorporates such factors as industry, services, target audience, and conversion strategy. The social platforms also maintained unique processes that forced account creators to map them individually for account setup and tracking; for instance, Waze didn't allow the client to export individual campaigns from its reports and Google Ads wouldn't export individual filters like industry or business service.

The surging demand also made it increasingly difficult to keep a strict control of the account spend of thousands of customers across multiple platforms given the manual nature of the processes:

- Extraction of spend information for each platform. In some cases, extraction had to be done account by account
- Update master control file with updated spend information by account.
- Reconcile spend with account/platform specific thresholds
- Communicate to customers once platform spend thresholds were hit
- For accounts over the spend threshold, pause platform activity or maintain campaigns, based on customer negotiations.



These challenges created multiple pain points, including:



**Inadequate customer spend visibility and campaign funding.** The tedious, repetitive process made it impossible for marketing staff to reconcile spend for every customer every day. Daily reconciliations would give the client instant visibility of spend and provide the necessary inputs for better fund allocation across the different platforms.



**Delayed billing cycles** without timely spend reconciliation, accounts were regularly over drafted forcing marketing executives to chase down customers to request additional funds to keep campaigns going.



**Slow initialization of service** with the process of creating a single account potentially taking longer than a single workday, start of service was often delayed. The manual process for updating accounts - or adding new campaigns that incorporate new platforms or new features on existing platforms - was also incredibly time-consuming.

Furthermore, the ever changing nature of social media platforms and the constant addition of new offerings required for the solution to be flexible and easily updatable to ensure long term value.

## THE SOLUTION

The Auxis Intelligent Automation team used Robotic Process Automation (RPA) to solve the client's challenges surrounding account creation and spend reconciliation.

The solution was designed and implemented to **automates the end-to-end creation of 80-85% of new accounts for the client with a single tool**, requiring minimal tweaking from marketing executives. It enables coherent campaigns based on client-specific demographics to run across the social platforms a customer chooses through the client's software. From the beginning, Auxis set realistic expectations. Given bot's heavy interaction with external platforms that constantly add new functionalities. Bots require reprogramming to adapt to sudden process exceptions like a new popup or website redesign and social platforms make frequent changes without notice.

Productivity and efficiency gains were also immediate from the Auxis team's RPA in digital marketing solution for spend reconciliation.

Automating an inefficient business process is one of the biggest mistakes RPA teams make that cause projects to fail. Before applying automation, Auxis helped the client redesign its clunky process for spend reconciliation - not only increasing efficiencies but minimizing interactions with external platforms prone to sudden changes.

Together, Auxis and the client identified extractable reports that compiled spend data for multiple accounts, enabling Auxis to create a faster and more stable RPA solution than individual account searches. The client also produced a standardized form for capturing new account information that simplified the account creation process.

With process improvements in place, the RPA solution for spend reconciliation:

- ✓ Extracts a report from each platform that contains data for multiple accounts.
- ✓ Extracts the necessary data from the reports.
- ✓ Updates the master control file for statement reconciliation.
- ✓ Reconciles spending for every account.
- ✓ Identifies the budget for every account so it can recognize depletions.
- ✓ Identifies accounts that are underbilled and alerts the corresponding marketing account executive to contact the customer.



## RESULTS

Auxis delivered a best-in-class RPA in marketing solution that delivered exceptional productivity and efficiency gains. It supported the client through the entire RPA journey, from process redesign to on-time implementation to ongoing management and support.

Key benefits the client achieved through its partnership with Auxis include:



### **75% faster account activations**

Automating a campaign's setup and launch across multiple platforms reduced processing time for new account creations by an average of 75%. As a result, the client was able to speed the initialization of new customer campaigns and shorten the cycle time to revenue. Automating this work also enables the client to add customers and scale without adding more FTEs.



### **Productivity & efficiency gains averaging 90% per platform for spend reconciliation**

After the process for managing spend was improved and automated, processing time dropped by an average of 90% per platform, enabling timely spend reconciliations that keep customer accounts from overspending. In fact, the RPA in digital marketing solution is so fast that it can run multiple times a day, offering customers real-time insight into account status. Automating spend reconciliation for digital marketing campaigns also reduced operating costs for the client by 80%.



### **An enhanced ability to deliver world-class customer service**

Tracking spend data on a timely basis offers customers better visibility to the status of their campaigns. This improves the customer experience by giving them better control, enabling them to make timely decisions about continuing or pausing campaigns before they exceed their budget. It also prevents unexpected campaign interruptions when accounts are underbilled. Better visibility to account performance further helps marketing executives accelerate campaigns to make sure monthly pacing is achieved. It also enables them to optimize results by helping the customer reallocate unused funds to better-performing campaigns.



### **Faster billing cycles & improved cash flow**

Daily reconciliations enable the client to recoup funds faster from underbilled accounts. They also alert marketing staff to pause campaigns before accounts overspend significantly.



### **Bandwidth to focus on core business activities**

By automating the time-consuming process for managing spend, marketing staff can focus on higher-value tasks that drive growth and improve customer satisfaction, such as analyzing campaign trends to optimize results for their customers.

More than 90% of Auxis customers choose to expand their initial RPA engagements – and the digital marketing company is no exception. Pleased with the success of its automation, the client tapped Auxis to move forward with a second phase.

Auxis is currently in the process of applying RPA to the client's billing review process. When completed, the RPA process will automatically stop campaigns on every platform if their budgets are depleted to avoid misuse of customer resources.

