

JOHNSON FINANCIAL GROUP

Case Study Overview

- Johnson Financial Group, a premier financial services company, needed to automate their manual data entry processes due to a growth in data
- The automation solution required the ability to move data in and out of the Johnson Financial Group systems, upload data into the core, as well as move data to new partners' databases
- Foxtrot was selected to accurately and rapidly move data across organizational lines and saved up to 95 percent in man-hours necessary to process mortgage loans alone

Overview

Johnson Bank is a member of Johnson Financial Group, a premier financial services company offering comprehensive financial solutions in the areas of banking, wealth, and insurance. Founded in 1970, the \$4 billion financial services company has more than 40 locations in Wisconsin and Arizona and employs 1100 people. Principal owners of Johnson Financial Group are members of the Samuel C. Johnson family. Helen Johnson-Leipold is Chairman of Johnson Financial Group.

The Challenge

From an organization that began in a trailer in Racine, Wisconsin, in 1970, the Johnson Financial Group has experienced significant growth over the years and has expanded to more than 40 locations.

The company's expansion, some spurred by mergers and acquisitions, created a need to manage the corresponding amount of growth in data. Manually inputting the new data was taking an enormous amount of time. To avoid errors, manual processes to accommodate the increased data were no longer an option. The company needed to automate its data management.

Whatever resource was selected needed to move data in and out of its systems, have the capability to upload data into its core applications, obtain information from those systems, and move data to the databases of its new partners.

The Foxtrot Solution

Foxtrot was selected on the recommendation of a Johnson Financial Services representative who attended a trade show. The technology's ability to accurately and rapidly move data across organizational lines was precisely what Johnson Financial was seeking. With disparate data pouring in from all sides, Foxtrot's scripting capability was employed to rapidly merge data and help administrators gain greater understanding of what the data revealed.

Return on Investment (ROI)

Foxtrot's scripting ability, alone, resulted in up to 95 percent savings in man-hours necessary to process data centered on mortgage loans.

According to Rita Kerkman, AVP Management Reporting Specialist for Johnson Financial Group, loan specialists were able to process loan data in only five percent of the time they had required to manually administer the same information.

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“Before Foxtrot,” says Kerkman, “It took someone a full week to process loan data. With Foxtrot, it takes only about two hours. That’s an enormous savings of time and money.”

Over the course of a single year, Foxtrot reduced the annual total man-hours necessary to manage and process loans from 16,640 man-hours to only 832 man-hours. The value of the time saved: \$304,000 in man-hours.

“That’s only a single example,” points out Kerkman. “As our staff has become better acquainted with Foxtrot and more confident in using the scripts we have generated for its use, we have uncovered other ways to harness the technology to our needs.”

Kerkman also stresses that the time savings generated by Foxtrot also made a significant intangible contribution to one of Johnson Financial Group’s core values: customer service.

According to Kerkman,

Close interaction with our clients is extremely important to us. It is one of the key tenants of our business philosophy. Equally as important, Foxtrot provided an invaluable benefit that fit precisely with the company’s core values.

The extra time Foxtrot has gained for us allows us to focus on providing greater assistance to our clients. As a result, we are more creative in delivering the kind of innovative thinking that strengthens our relationship with our clients and ultimately makes them more successful.”

About EnableSoft Inc.

As an early innovator in the Robotic Process Automation space, Orlando, Florida-based EnableSoft Inc. has helped organizations save time, save money, and improve productivity, since 1995. The EnableSoft team develops and markets Foxtrot, software that eliminates the burden of manual data processes by behaving, deciding, and working just like a person.

With this “Automated Employee,” operations and other subject matter experts automate tasks that until today were only performed by hand or with the help of complex custom programs. With minimal training, current staff are able use Foxtrot to automate manual processes, including data breaches, platform interfaces, and regulatory updates

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through their existing data systems. Through Foxtrot, EnableSoft empowers individuals to conquer their own data-related challenges today, and become efficiency heroes in their organizations.

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