

EDF Energy Drives Continuous Improvement In Its Financial Shared Services Center



Case overview

EDF Energy is increasing number of non-core energy assets in the UK. The financial shared services center provides transactional accounting services across EDF Energy business.

Project size

Finance and Accounting Automation

Implementation time

Within 4 weeks

The Financial Shared Services Center is at the heart of EDF Energy. It provides transactional accounting services across the company's retail electricity, generation, nuclear and renewable energy businesses.

The center has a long-established continuous improvement program to ensure it always provides the best services to its internal customers. Robotic Process Automation (RPA) presented an opportunity to enhance this program. EDF Energy selected UPath to increase the efficiency of the center's operations and extend the services it could offer to other business support operations.



EDF Energy is the largest supplier of low-carbon electricity in the UK. The company services around 10,000 clients and is the largest producer of electricity by volume in the UK and the largest electricity supplier to UK businesses.

With its six million domestic product accounts, and one of Europe's largest infrastructure projects at Hinkley Point C, effective financial operations are a key part of delivering an excellent customer experience. The Financial Shared Services Center must deliver highly efficient operations to meet the needs of EDF Energy businesses.

Robert O'Leary, Director of the Financial Shared Services Center, explains: "Continuous improvement is vital to us, but there are only so many ways that you can make a process more efficient and more effective. The real potential value could allow us to automate many repetitive parts of our processes and support our staff by removing some of the mundane activities from their workload. We harness cutting-edge technology, until we feel sufficiently robust that we feel it could deliver the benefits we were looking for."



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Robert O'Leary
Director of the Financial Shared Services Center

Selecting the right RPA platform

The company's Customer business has established a relative Center of Excellence (CoE) to help automate its back-office processes. This helped center O'Leary that there are multiple interested solutions like the Financial Shared Services Center. However, it also wanted to see that it was something that the center should do best.

"The automation needs of the customer service team and ours are quite different. While they were looking for a back-office processing and all very high-volume processes, which are in many cases automated, we wanted to automate to help people in support functions, including ours, do their job more effectively and efficiently. We wanted an RPA solution that could drive this," says O'Leary.

Robots saved

£100k

in software license and environment costs

70 hours

saved on maintaining the pilot stage

6X ROI

compared to the previous manual process

There were two key criteria when selecting the RPA platform. First, that it be affordable so that the center could start small and grow over effectively over time.

Secondly, it had to be easy to use so that the team could rapidly become self-sufficient. After evaluating the market, EDF Energy selected UPath. Enterprise RPA Platform is regarded the best combination of functionality and value.

O'Leary comments: "Unlike other vendors where we were looking at buying multiple licenses, UPath allowed us to purchase a single Robot and then add Robots one at a time after that. This made it very affordable for us to move into proof-of-concept and pilot stages quickly. Also, UPath seemed very straightforward to learn, and the company offered excellent training and support to enable us to build our RPA capability."

As well as automating the process, the Financial Shared Services Center can benefit from UPath to expand its RPA capabilities to other support centers within the company – such as human resources (HR) and information technology (IT) – limited center processes but still want to build the RPA capability in their own departments.

Getting started

The center wanted to build a proof of concept (POC) that could also be rolled out into a live system to deliver continuing value to the company after the initial on-site management team. The process for handling manual journal entries was selected as the pilot. It was later extended to include several different systems – including Enterprise Resource Planning (ERP), spreadsheets, email and shared network folders – to complete.



We estimate that the new automated process will save us £50,000 each year through the reduction of peak workload. It also frees up time within the team and means that we can handle months end without extending overtime or hiring extra staff.

Robert O'Leary
Director of the Financial Shared Services Center

A journal records every financial transaction that takes place within such as sales, purchases, and payments. Every time a new transaction was entered into a system, it had to be reviewed by a member of the center's team. If the transaction was correct, it was approved by the company's ERP system or returned to the engineer if incorrect.

The ERP system would also check for errors and reject if any were found. This process was repeated until the entry was correct and the team member could pass the entry to another team member to approve and post the updated journal.

For a company like EDF Energy, there are a substantial number of journal entries created and recorded, with activity often concentrated around the end of the month. The team found that the journal entry process consumed 20 man-hours each month, but as this was mostly concentrated throughout a week, it took the equivalent of two staff members working weekly on this one task.

The center worked with PwC to develop a Robot that helps automate parts of the process. The team member still reviews the new journal entry, but now the Robot picks up the entry, automatically checks that it is in the correct format for the ERP system and posts the entry.

If there are any errors identified for the ERP system, the Robot takes a screenshot of the error and emails it to the engineer. If the entry is correct, then the Robot posts the journal.



Learning to benefit from RPA

The pilot was live within six months and showed that UPath Robots were able to easily work with multiple systems and provide good support for the center's team. The real benefit of developing a solution for the Robot means that the live processing double the volume of work that was initially expected.

The first Robot has performed so well that the center has purchased a second Robot to help process to work on more efficiently during peak times work that the center has other support functions for this service.



Now, the Robot can do all the data collection overnight, and the staff member has the data at their fingertips to be productive as soon as they reach the office.

Robert O'Leary
Director of the Financial Shared Services Center

O'Leary says: "Using UPath, we have flexibility in any process. It can be applied to any Robot, so we can deploy whatever we require to support, our entire operations as to cover when the volume of a given process suddenly increases exponentially."

The pilot also proved how easy the UPath Enterprise RPA Platform is to learn and use. After some time as PwC was developing the initial POC, the center employed its own RPA resources. The intention was for the center to become self-sufficient over time but it had to really become self-sufficient by the time the pilot was delivered.

"The advice for our Robot engineer came down to embrace with RPA, experiment or compare with little knowledge of individual immediate current and the willingness to learn," says O'Leary. "We chose the latter and its probably one of the best decisions we made. Our own staff member was up to speed with RPA in less than a week and started to build on new Robots and other capabilities to other things we do."

"The great thing about UPath is advanced features that allow you to take automation even further, so you can focus on innovation and not worry about software limitations."

The ability to apply Robot to new challenges has quickly become important for the center and business. As the staff learn that Robots could help them to do their job more efficiently and also mean to focus on the sales, knowledge-centric aspects of their job, they have been quick to support other processes where Robots can bring improvements.

Key benefits

2X volume

increasingly used to handle more work than the initial solution

6 months

to complete and efficient in the environment

£50k

annual maintenance cost saving

"We've followed the UPath methodology for more years, so our people are used to changing everything we do. When they see what supports the Robots through to the journal entry process, staff begin to suggest new applications to make their life better. Since we completed the pilot, we have automated another eight processes, and there's a lot of smaller 40 to 60 tasks on when we can get next," says O'Leary.

Reaping the rewards

The center has found that Robots to be most productive when they remove tasks that take a good deal of time from a staff member's day. It has focused on processes where there is a steady flow as a priority for automation.

The eight processes that have been successfully automated include the transfer of Accounts Payable data directly into the ERP system and where data had to be gathered from different systems before analysis in support of its calculations could be undertaken.

The great thing about UPath is its advanced features that allow you to take automations even further, so you can focus on innovation and not worry about software limitations.

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"Looking at the tax calculations, it would take up to five hours to pull all the data together to start the annual analysis. It staff member could begin the data collection process at 8 AM and by 1 PM they were ready to begin the annual work. Now the Robot can do all the data collection overnight, and the staff member has the data at their fingertips to be productive as soon as they reach the office," says O'Leary.

In all, O'Leary estimates that together the eight automated processes have delivered a six times return on investment (ROI) regarding time and money.

In the case of a new opening system, opening time has saved the company over £50,000 in software and development costs. The Robots also show the need for data transfer to the new system and how the flexibility for the company to rapidly change the data feeds – such as changing new data – quickly and cost-effectively without affecting operations in any way.

The success of UPath within the Financial Shared Services Center is helping to see that in the center's activities have streamlined flows from other financial functions, as well as the IT and HR departments.

"Once other functions understand the benefits they are keen to discuss how the Robots can help improve their processes. We're now at the point where we have to carefully manage operations, so we can continue to build better efficiencies and bring the potential of RPA to more people across the business," concludes O'Leary.