

# The Intelligent Automation Journey: Case Studies and Client Outcomes

*Presentation sponsored by:*



## SESSION

### **Shawn Grisim**

Account Executive, Greenlight Consulting

### **Lewis Goldenberg**

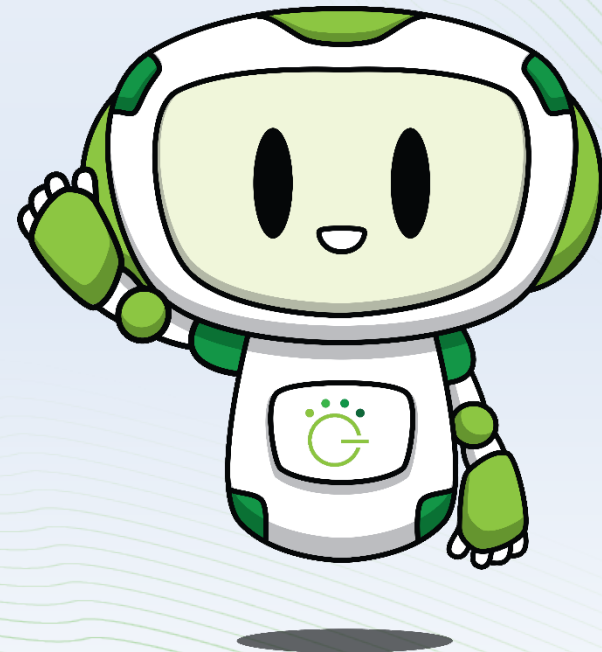
Sr. Intelligent Automation Advisor, Greenlight Consulting





**Elevate Work,**  
**Harness Intelligence**

[www.greenlightconsulting.com](http://www.greenlightconsulting.com)



# Meet Your Speakers



## Shawn Grisim

Shawn Grisim, the Public Sector Lead (Canada) at Greenlight Consulting, brings nearly three decades of experience partnering with the public sector. His diverse career brings a wealth of experience in cybersecurity, federal government initiatives, business development, and customer relationship management. His primary focus remains on fostering digital transformation, notably in the public sector, through initiatives in Intelligent Automation and AI.



## Lewis Goldenberg

Lewis Goldenberg, the Sr. Intelligent Automation Advisor at Greenlight Consulting, is a transformative Automation Consultant with over 18 years in IT Operations, Software Development, Process Improvement, and Automation Delivery. Having led and supported digital transformation and automation initiatives across various sectors, Lewis has established himself as an expert in harnessing Intelligent Automation, AI, and ML to optimize operations and empower teams. From spearheading Intelligent Automation implementations in the telecommunications, energy, banking, insurance, and retail industries, to consulting with C-suite executives and operational delivery teams, Lewis' journey reflects a steadfast commitment to leveraging technology to free human potential, enabling individuals to focus on more strategic and fulfilling projects.



## WHO WE ARE

- In business for **16+ years**
- Focused **only** on **Digitization & Automation Services**
- Specializing in Enterprise **Automation, Data, and AI**
- **90+** certified Leads, BAs, Developers, Architects
- **100+** successful implementations across North America

**2.3M+**

Client Hours Saved Per Year

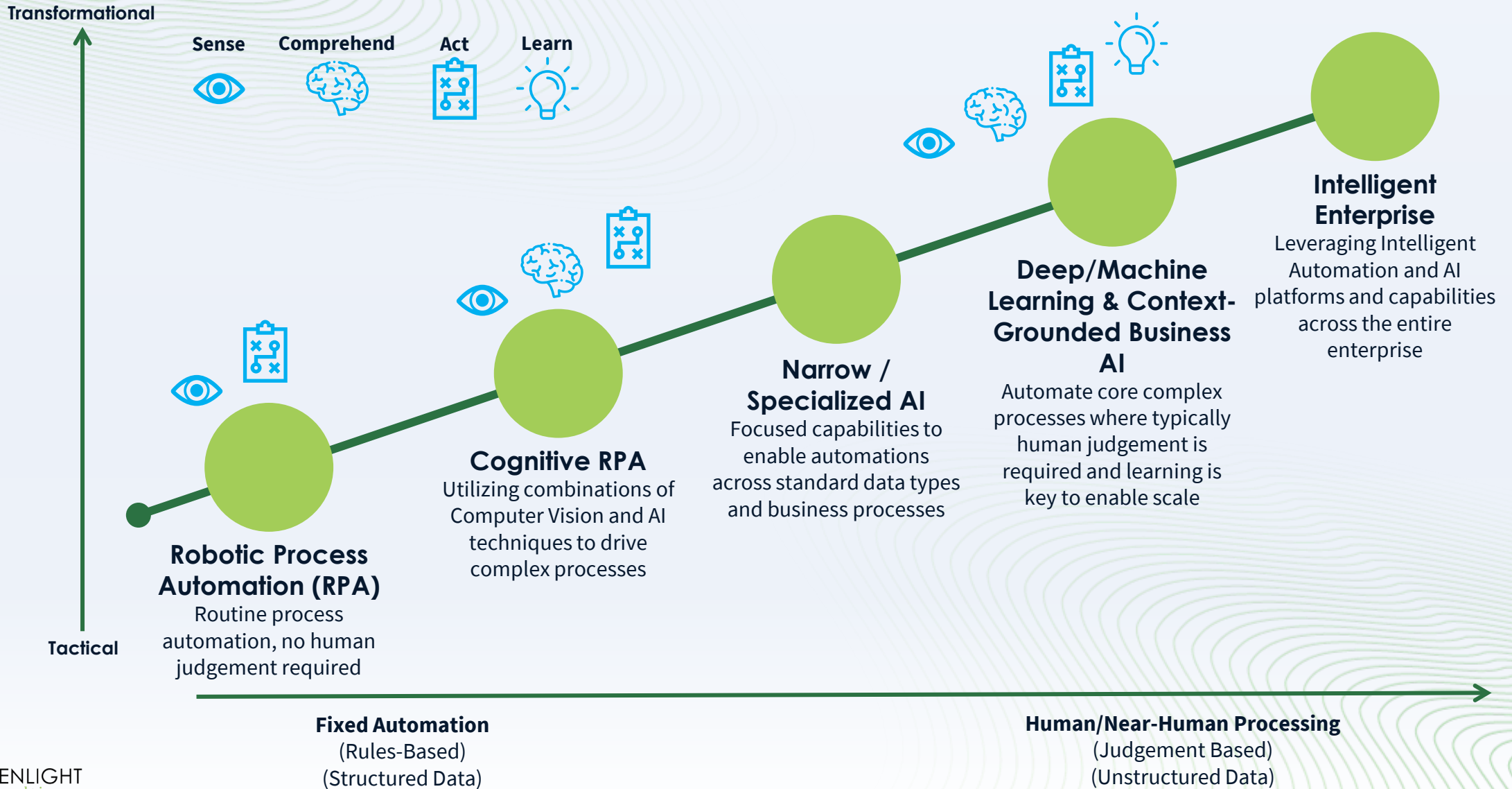
**\$18MM+**

Total ROI Per Year

Operating out of  
**USA, Canada, &  
Costa Rica**



# The Intelligent Automation Journey



# Customer Highlight: CRA – Security & Taxes

## OVERVIEW

Two (2) complex automations targeted at helping to ensure Canadian Citizens CRA accounts were reviewed for suspicious activities and cleared or escalated if needed, and another for allocating tax payments to proper entities within complex accounts.

### PROJECT GOALS: SUSPICIOUS ACTIVITIES

Clear a large backlog and support reviews for new occurrences of flagged accounts.



**IMPROVE TAXPAYER SECURITY**  
Reduce the number of citizens impacted by fraudulent activity



**REDUCE MANUAL REVIEWS**  
Robots quickly identify false flags and clear them



**IMPROVE RESPONSE TIME**  
Enable analysts to focus on impacting events more quickly

### REALIZED BENEFITS

**\$1.2M**  
IN SPENDING COSTS  
AVOIDED

**43,000 HOURS**  
RETURNED TO AGENCIES  
THROUGH AVOIDED  
MANUAL WORK

**1,000,000+**  
SUSPICIOUS ACTIVITIES  
REVIEWED AND  
PROCESSED

**300,000+**  
UNALLOCATED TAX  
PAYMENTS RECTIFIED

*Metrics captured from first 6 months of implementation*

### PROJECT GOALS: UNALLOCATED TAXES

Clear a large backlog of over 250K to identify and allocate taxes to appropriate tax entities within accounts



**IMPROVE TAX ALLOCATIONS**  
Increase accuracy of remittance payments to citizen tax accounts



**AVOID COSTS**  
Offset the need to hire additional analysts to process backlog (6 FTE)



**REDUCE MANUAL PROCESSING**  
Agents tackle the backlog when they have availability, but growing demand prevents this

Additional Benefits include freeing up Taxpayer funds for other projects and initiatives and reducing the number of Citizen Inquiries to the agency's contact centre.

# Customer Highlight: Health Care – Patient Record Audit

## OVERVIEW

Nurses and clinicians need to scan and attach patient documents through a centralized management system, however due to a combination of the high volume of clients, the pace of work that these frontline practitioners must work, and just due to human error such as mis-clicks or typing, patient documents are sometimes attached to the wrong patient. This can cause downstream issues for doctors, general medical processing, and puts PII & PHI at risk to be viewed unintentionally by other patients.

## PROJECT GOALS: AUDIT & CORRECT

Audit millions of patient documents and audit the Document Type & Patient #, correcting any that are mislabeled.



### IMPROVE DATA ACCURACY

Auditing & corrective actions will improve the accuracy of submitted documents



### REDUCE RISK TO PII & PHI

Patient data, personal and medical, is linked to the correct patient



### REDUCE MANUAL EFFORT

Frontline clinicians don't have to spend time fixing these errors and can focus on their patients

## REALIZED BENEFITS (PHASE 1)

**\$150,000+**  
IN COSTS AVOIDED FROM  
HAVING TO HIRE  
ADDITIONAL RESOURCES

**4,000+ HOURS**  
RETURNED TO OVER 4,500  
NURSES, PHYSICIANS, AND  
STAFF

**> 98%**  
**ACCURACY**  
FOR AUTOMATED  
CORRECTIVE ACTIONS

**AUDIT  
TRACKING**  
ERROR RATES AND  
TRAINING OPPORTUNITIES  
IDENTIFIED

*Metrics from Phase 1 implementation, which focuses on 10 Document Types out of ~200 commonly used*

## INTELLIGENT AUTOMATION TECHNOLOGY UTILIZED

Client used UiPath's Business Automation Platform with the following capabilities:



### UNATTENDED ROBOTS

Integrated with files & centralized systems to make corrective actions



### DOCUMENT UNDERSTANDING

Read patient document files to identify the Document Type & Patient Info



### ACTION CENTER

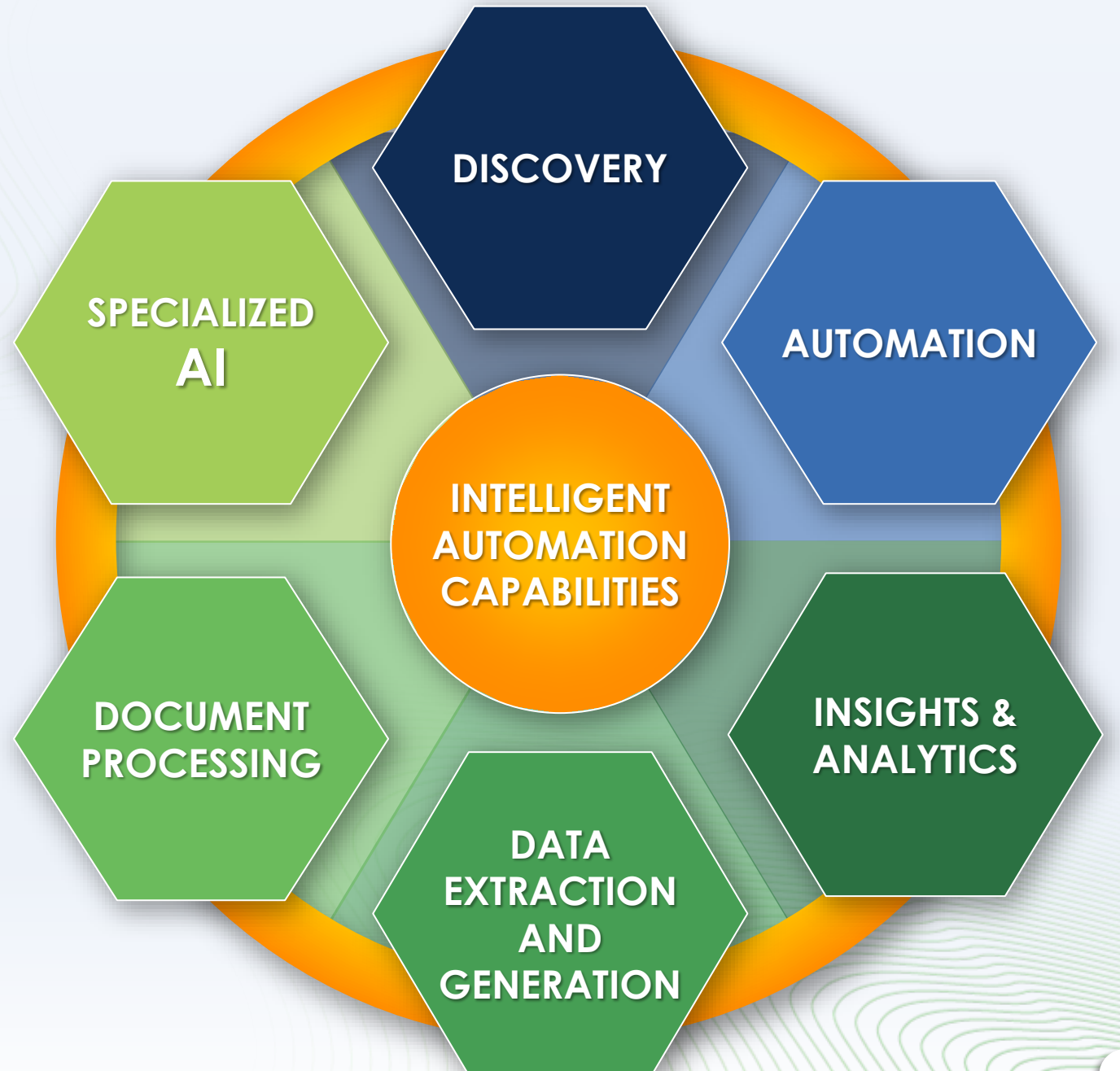
Human-in-the-loop engagement for exception handling & review

# ● ● ● ● INTELLIGENT AUTOMATION CAPABILITIES

Greenlight partners with clients to build their digital capabilities.

## INTELLIGENT PROCESS AUTOMATION

allows them to innovate and streamline their business in a rapidly changing landscape





# Automate Your Enterprise

## FINANCE & ACCOUNTING

PO & Invoice Automation

Vendor Onboarding (Maintenance)

Vendor Portal Queries

Funds Transfer

Customer Onboarding & Maintenance

Incentive Claims

Journal Postings

## HUMAN RESOURCES

Employee Onboarding

Employee Offboarding

Payroll

Compliance Reporting

Time & Attendance Management

Employee Data Management

Benefits & Stock Administration

## CUSTOMER SERVICE

Call / Contact Centre Processes

Email Contact Center Processes

Customer Data Management

Loading Start-of-Call Customer Details

Service Requests & Scheduling

Customer Info & Preference Updates

Transaction Automation

## INFORMATION TECHNOLOGY

User Setup & Configuration

File & Document Management

FTP Download / Upload & Backup

Application Integration

Data & Content Aggregation & Migration

ERP & Other System Integration

Batch Processing

## OPERATIONS & COMPLIANCE

Screening & Risk Management

IP & Fraud Detection

Compliance Reporting

Policy Administration & Servicing

Invoice, Quote, & Contract Management

Order Processing

Credential Verifications



# WHO IS USING THIS TODAY?



Immigration, Refugees  
And Citizenship Canada



Public Services and  
Procurement Canada



Fisheries and Oceans  
Canada



Transport  
Canada



Innovation, Science and  
Economic Development Canada



Canada Revenue  
Agency



Health  
Canada



Indigenous  
Services Canada



National  
Defence



Canada Border  
Services Agency



BANK OF CANADA  
BANQUE DU CANADA



Courts Administration  
Service



Immigration and  
Refugee Board of Canada



EDC



COMMUNICATIONS  
SECURITY ESTABLISHMENT  
CENTRE DE LA SÉCURITÉ  
DES TÉLÉCOMMUNICATIONS



FORTIS BC™



UHN

Toronto General  
Toronto Western  
Princess Margaret  
Toronto Rehab  
Michener Institute



Hydro  
Québec

# Thank you!

## Q&A



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