

# 50 Sample Processes for Robotic Process Automation (RPA)

Robotic process automation (RPA) enables organizations to use software robots to complete repetitive, time-consuming work to significantly increase productivity, improve quality and decrease the need for re-work — which can result in improved customer satisfaction. [Watch the video.](#)

Additionally, it can provide a retention and employee engagement benefit by freeing up your employees from unsatisfying work and allowing them to focus their time on customer-facing, value-added work to further develop their skills and experience.

So where do you start? What processes lend themselves to being automated with RPA? Here's a list of industry and functional processes to get you started:

## Industries

### Insurance

1. Client profile updates
2. Generating renewal premiums
3. Claims processing
4. Underwriting processes
5. Policy administration and servicing

### Financial Services

6. Requests for overdraft protection
7. Exception processing (overrides for high-value customers or low-risk transactions)
8. Statement reconciliation
9. Credit card applications
10. Dispute resolution

### Healthcare

11. Patient registration
12. Provider credential verification
13. Member eligibility and billing
14. Preparing and submitting claims to insurance providers
15. Administering Medicare billing and compliance
16. Applying billing code changes to procedure records
17. Checking the status of accounts payable and issuing new invoices
18. Verifying insurance enrollment and eligibility
19. Comparing medical records across systems
20. Sending patient appointment reminders
21. Providing clinical documentation

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# Executive Perspective

## Transportation

- 22. Managing fleet status
- 23. Notifying drivers of construction route changes
- 24. Processing invoices for billing
- 25. Monitoring service and repair records
- 26. Verifying shipping and delivery dates

## Retail

- 27. Managing complaints
- 28. Enrolling customers in loyalty programs
- 29. Issuing loyalty rewards
- 30. Processing return authorizations
- 31. Sending shipping notifications
- 32. Reordering inventory when supply reaches threshold
- 33. Completing month-end documentation

## Finance & Accounting

- 39. Processing accounts payables
- 40. Expense report processing
- 41. Payroll processing
- 42. Revenue accounting
- 43. Generation and distribution of reports

## Miscellaneous

- 44. Change of address processing (can be on multiple systems)
- 45. Fraudulent account closing
- 46. Customer complaints processing
- 47. Data cleansing
- 48. Straight-through processing of customer orders
- 49. Order updates
- 50. Shipping notifications

## Functions

### Human Resources

- 34. W4 management
- 35. Benefits administration
- 36. Onboarding
- 37. System access and setup
- 38. Compliance reporting

Robotic Process Automation is well suited for processes that are clearly defined, repeatable and rules based.

Based on these criteria, it can help organizations across numerous industries automate the completion of a wide variety of tasks. [Learn more here.](#)

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