



# RPA SUCCESS STORY

Carter Bank & Trust



BANK ACHIEVES 3,800% ROI WITH FORTRA AUTOMATE RPA SOFTWARE



## BACKGROUND

Carter Bank & Trust was spending far too much time on error-prone, manual tasks. As a growing, state-chartered community bank serving customers in Virginia and North Carolina, the organization needed ways to automate many laborious processes. Having used robotic process automation (RPA) solutions in a prior role, CIO Matt Speare turned to Fortra to address this growing challenge.

**3,800% ROI**  
in less than 5 months

**300,000+**  
accounts migrated

**75**  
software robots in production



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## COE MAKEUP

- IT committee with heavy involvement from the business
- 10 developers work as part-time bot development
- Dedicated business analyst to source automation opportunities
- Company-wide contest to uncover candidates for automation
- .5 FTE spent maintaining and monitoring existing bots
- 1 FTE spent building new bots
- **60 hours/week spent on RPA**

## CHALLENGES

- **Work was too manual**, with slow, **error-prone** processes
- HR example: new employee onboarding and payroll, where multiple employees manually created user access in Active Directory, managed training in their learning management system, and handled weekly payroll

## BENEFITS

- **75+ robots** run processes across the company, saving time and money
- Scaled well beyond new employee onboarding and payroll by tackling a large data migration project, system migrations, 3rd-party SLA management and claw-backs, and overall data validation processes

## SOLUTION

- The company needed a flexible **RPA solution that was easy to implement, scale, and maintain**
- Establish automation as a strategy through the creation of a Center of Excellence, an “automation first” culture and “Carter bots”

## RESULTS

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### Company Profile

Location:	Martinsville, VA
Employees:	1,000
Website:	<a href="http://carterbankandtrust.com">carterbankandtrust.com</a>

*“We could never have migrated 300,000+ accounts without Automate. I don’t care if I had 100 people for a year, it never would have worked. It allows you to crunch through a lot of the data and routine testing you’re doing over and over. It never gets tired. That’s why we love Automate.”*

**-Matt Speare, CIO, Carter Bank & Trust**