

Customer Success Story

USALLIANCE

About USALLIANCE

USALLIANCE is a full-service, not-for-profit financial institution headquartered in Rye, New York that offers a full range of financial products including checking, savings, and credit accounts as well as loan products. An industry leader, USALLIANCE provides top of the line electronic services to members with easy to use online and mobile account and loan opening platforms as well as compatibility with Apple Pay and other mobile payment solutions, and Apple Watch and Android Wear app compatibility.



Industry: Credit Union

Headquarters: Rye, NY

Company Size: 150-200 Employees

Website: www.usalliance.org

Solutions: Process Documentation, RPA design, UiPath software installation, change management



The Challenge: The Covid-19 Pandemic Fueled Need For Greater Efficiency

USALLIANCE saw the need to improve processes on many organizational levels to better handle both challenges and opportunities brought on by the Covid-19 pandemic. Challenges they wanted to address included:

- Employees maintaining multiple username/password combinations for internal and external systems and portals.
- Ability to manage historic highs of refinancing requests and loan payoff balance requests due to the current interest rate environment.
- Process completion deadlines of 6-7 days exceed employee work schedules.



The Solution: Document, Automate & Implement An RPA Solution

After consulting with Neostella to select UiPath as their new RPA tool, USALLIANCE partnered with Neostella for multiple in-depth discovery sessions to:

- The automation ordering of Flood Zone Certification services.
- Utilizing RPA to complete high-volume task of compiling loan pay-off letters.
- Utilizing RPA to download mobile check deposit files to fraud prevention partner.
- Custom creation of UiPath bots which would automate recurring manual file downloads from third-party applications and data/report extracts.



The Results: More Time For Customer Service & New Business

With a tailored UiPath solution, USALLIANCE has witnessed:

- Fewer employee hours and less part time help required to complete loan payoffs
- Automated Flood Certification process has resulted in shorter turn times to closing
- Creation of baselines processes can easily be replicated for other systems
- Less time spent on repetitive tasks means more time available for more meaningful work



“In less than six months, our RPA Team has already realized efficiency gains, not to mention popularity within our organization. Establishing a partnership with Neostella enabled us to implement two complex RPA solutions, with immediate returns on our time and money investment. Beyond the typically expected returns, our most significant value-add of the relationship has been the lessons learned and clear benefit gained by applying best practices.”

Stephanie Hyles

SVP/COO | USALLIANCE Financial

About Neostella

Neostella is a global enterprise software and solutions company that empowers organizations with the technology resources they need to exceed goals and push the boundaries of what is possible. Offerings include Legal Solutions, Work-Relay process and workflow solutions for Salesforce, Robotic Process Automation, and Application Integration. In addition to technology solutions, Neostella provides a wide range of professional services designed to help customers reap maximum ROI from their technology investments. With offices in four countries around the globe, the Neostella team is committed to providing exceptional customer support 24/7.