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The Navigator for Enterprise Solutions

**ROBOTIC PROCESS
AUTOMATION
EDITION**



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Rob Drover,
VP of Digital Consulting

Marcum Technology

Intelligent Automation for High-Performing Operations

Pandemic-driven digital transformation has left no doubt about the importance of automation. Businesses are suffering an employee crisis, facing an evident lack of skilled professionals and staff to perform various critical operations. Compliance regulations are becoming increasingly more stringent and are requiring significant manual work. While many of these regular, mundane tasks lack the challenge and diversity demanded by the workforce; there is little choice but to maintain these tasks to keep businesses running. This paradigm to reduce operating costs, at the same time increasing compliance and increasing efficiency (without adding workers) is driving clients to partner with Marcum Technology, which offers Intelligent Automation Solutions (ML/RPA/AI) which includes Robotic Process Automation.



Marcum has always been in the forefront of technology adoption as part of the accounting industry

Marcum Technology is part of Marcum LLP, a national accounting and advisory firm offering a complete spectrum of accounting, tax, assurance, and advisory services. “Marcum has always been at the forefront of technology adoption as part of the accounting industry. We understand the functions our clients execute daily, and we were quick to automate them,” says Rob Drover, VP of Digital Consulting. Over five years ago, Marcum introduced robotic process automation (RPA) to the Partners of the firm. They established a center of excellence to educate, train, and impart knowledge about implementing RPA. Numerous internal processes were re-engineered and automated using the new technology. The project was a great success, and the internal experience gave the team confidence to bring their RPA solutions to the market.

The Marcum Technology RPA process is fairly simple for the client, making what seems like a daunting project understandable and seamless to the client’s operational team. When a client approaches Marcum with an initial need for automation, the Marcum team works with the client to expand and extend that initial use case to help them realize the true capability of automation technology and how it can meet or exceed their initial requirements. With Marcum’s experience as both technologists and accounting

leaders (CPAs), the Marcum team evaluates the challenge from a client lens and provides the maximum return on investment (ROI) from their automation investment. Once the client needs have been identified and a solution design is architected, Marcum’s team then creates a process design document (PDD) to guide the build of the automation technology using a combination of robotics or artificial intelligence techniques as per the requirement. Once the solution is ready, system testing and user acceptance testing (UAT) follow. Unlike traditional UAT where the client is expected to participate directly in the testing process, in the case of automation the client actually observes the robots in action and evaluates whether the robot followed the test script and produced the correct output. Once the client signs off, the automation goes through a soft launch and then moves to full automated production.

Marcum blends artificial intelligence and machine learning concepts with more traditional RPA solutions to deliver advanced cognitive tools for clients. This combination is called Intelligent Automation (IA). Recently, they implemented an intelligent automation solution for a large city’s planning and permitting department. The department was struggling with a large backlog of building permit submissions and approached Marcum to help speed up the process. One of their challenges was that thousands of architectural plans and drawings had been submitted, and the wait time for each approval exceeded 3-6 months. Every plan and drawing are required to adhere to certain submission requirements, like file naming conventions, white space to place the stamp, sheet size requirements...etc., for the examiner to give approval. Marcum was able to automate a review process to look for these technical errors and quickly return them back to the submitters for correction. Within 30 days start-to-finish an automated robotic process was developed and launched. In the span of less than a week, the automated process was able to clear the backlog from an error-checking perspective. By using AI techniques such as computer vision the robots were able to read and analyze drawings and trigger application rejections automatically without any human intervention! This significantly increased the initial review speed, cleared the backlog and allowed the examiners to focus on the high value added review of the submissions.

Marcum is regularly presented with automation use cases along with a wide and unique variety of operational challenges across many industries. Not only does it design and implement automation solutions for clients, but it leverages its own automation infrastructure and offers Automation-as-a-Service solutions. Marcum now offers advanced accounts payable outsourcing and even Sales and Use Tax automation to complement its traditional accounting and tax services. 

Marcum Technology



**10 MOST
PROMISING
ROBOTIC
PROCESS
AUTOMATION
SOLUTIONS
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*The annual listing of 10 companies that are at the forefront of providing
Robotic Process Automation solutions and transforming businesses*