

AI and automation returns \$millions in value at MongoDB

- ▶ MongoDB has created one of the world's most popular NoSQL databases—and its platform has been downloaded hundreds of millions of times.

The company has tens of thousands of customers in over 100 countries, and one of the largest open-source communities on the planet—with over 100,000 members.



Client: **MongoDB**

Industry: **High Tech**

Region: **Global**

Over

— □ **100,000**

hours saved annually

— □ **\$7**

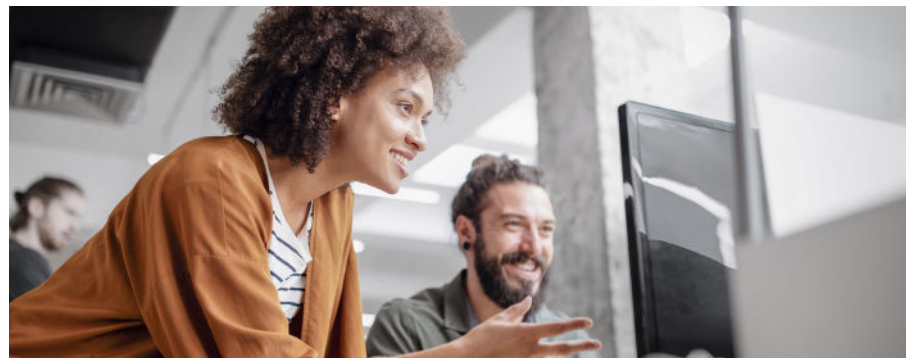
million in cost savings over
three and a half years

— □ **7.5**

times faster document
processing speeds

□ MongoDB's mission is to help others create, transform, and disrupt. And it's just as happy to turn that disruptive lens inward—to streamline and transform their own business. It's done exactly that by deploying AI and automation, and the tech company hasn't looked back.

Laborious, repetitive, manual data tasks were part of the working day for teams across the company. The company's Software-as-a-Service (SaaS) systems struggled to talk to each other, and spreadsheets were used to fill the communication gaps. In sales operations, for example, this dependence on spreadsheets was swallowing team resources, returning high error rates, and creating a lack of transparency in quota planning and goal management.



The challenges in the sales team were mirrored across the company—in finance, accounting, human resources (HR) and more. “The deeper we dove, the more we discovered that—even with our own cutting-edge technology and best-in-class systems—manual tasks and spreadsheet-based data analysis was happening across the business,” said Devika Saharya, Director of Business Systems. “I’d say it was at this point our automation program was born.”

The company launched its Robotic Process Automation Center of Excellence (RPA CoE) to tackle SaaS integration issues—taking full advantage of Lydonia’s specialized expertise to accelerate adoption of the UiPath Business Automation Platform™.

The Sales Operations team was the first to enjoy an automation-powered performance boost. MongoDB implemented an Operational Sales

Management (OSM) system that automated essential tasks like tracking compensation changes, integrating new hire data into the Compensation Model, and streamlining data transfers. The impact was immediate. Managing quotas and territories, analyzing performance metrics with predictive analytics, and handling compensation models became slicker and error-free. Vendor risk evaluations speeded up, sales cycles fell, and strategic planning became simpler.

The impact prompted the RPA CoE to embark on a company-wide adoption initiative. And the scorecard of successes rose quickly. In the IT department, automation now secures data handling. In finance, it's ensuring financial accuracy, aligning budgets, and enhancing forecasts. And in HR, automation is delivering insights to improve talent management and workforce planning.

□ The power of RPA

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□ Automation impacting the bottom line

Having deployed around 135 automations, MongoDB calculates the ROI in the \$millions. In sales alone, hundreds of hours a year are saved by automating training notifications.

Across the company, over 100,000 hours are being saved annually. **That's equivalent to 48 full-time employees and a saving in excess of \$3.3 million.** And these numbers add up. Over the past three and a half years, total savings through AI and automation have reached \$7 million.

While the results are impressive, even the best change initiatives can fizzle out after 12–18 months. Saharya knows this and her team is determined it won't happen at MongoDB.

“Credit goes to Lydonia. They're helping us create a plan to take the business to the next level—using AI-powered automation to maintain our momentum,” she said.



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□ Adding AI to the automation mix

A new project to streamline order form verification using the AI-fueled UiPath Document Understanding™ has changed the game again—perfectly capturing the value of combining RPA and AI.

This involves helping the Order to Cash (OTC) team validate order forms sourced from Salesforce—a high-volume, complex process. Each form used to take 15 minutes for manual verification—a total of around 2,500 hours a year. The team was being overwhelmed and backlogs had formed.

With Lydonia's support, MongoDB has streamlined the entire OTC operation—minimizing manual effort, clearing backlogs, and optimizing the verification process using the intelligent document processing capabilities of UiPath.

Document Understanding retrieves order forms from Salesforce, using AI to read, identify, and extract handwritten signatures. Missing signatures are highlighted, and documents automatically scheduled for follow-up checks. Detailed reports generated by the system send back actionable insights to the OTC team for efficient tracking and follow-up—thereby streamlining the entire verification process. Average handling time per form is down 7.5X. Accuracy and compliance has improved, and tracking and follow-up procedures are more streamlined. “We’ll continue to maintain our ‘standard’ automations, and will always strive to do more. But there’s no doubt that the future lies in AI—in areas like intelligent document processing and process mining. Right now, we’re entering a new phase in our development, and we’re excited to be supported all the way by Lydonia,” said Saharya.

“We have numerous opportunities to scale the business by harnessing the power of AI and RPA together. We can integrate AI into our toolkit and enhance the use of UiPath Document Understanding. We’ve already begun exploring the potential. I’d like to say thank you to the Lydonia team for always keeping us honest and helping us continually build on our success.”

Devika Saharya
Director of Business Systems