Robotics Process Automation (RPA)

Best Practices for RPA Journey

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AGENDA

- Typical RPA Journey
- Best Practices by Stages
  - Generating Pipeline
  - Delivery Model
  - Governance Model
  - Value Measurement Framework
- Q&A

WHAT IS RPA? WHAT IS NOT?

RPA	AI
Mimics a user's activities – non-invasive	Mimics human thought – vision, language, patterns, etc.
Structured data, some semi-structured data	Structured data and unstructured data
Rules-based automation	Probabilistic, with machine learning/deep learning
Agent assist or digital labor models	Point solutions – not broad-based capability

RPA helps overcome limitations of landscape of existing systems

"RPA takes the robot out of the human."

RPA applies equally for all industries and business processes

Source: *Various…online*

TYPICAL RPA JOURNEY

Stages

Driver

- Business Outcomes

Research

- Technology
- Non-Technical

Sponsor

- Financial
- Governance
- Risk

Pilot

- Solution
- Value
- Pipeline

Decision

- RACI
- Technology
- Value Tracker

Operate

- Industrialize
- Op Model
- Govern Value

Evolve

- Citizen Dev
- Desktop Bot
- RPA+

DRIVER

WHY

- Improve Operations
- Reduce Cost
- Increase Compliance
- Improve Staff Satisfaction
- Reduce Human Risk

✓ Contextual

✓ Strategic

✓ Measurable

Driver

- Business Outcomes

- Reduce Order booking and confirmation time by 10 %
- Reduce cost of issuing PO by 40%

RESEARCH

Objective Research

- Areas (processes, applications) for potential automation
- Internal and external focus
- Stakeholders analysis
- Technology options
- Service provider options
- Business-IT engagement model

Figure 1. Magic Quadrant for Robotic Process Automation Software

Source: Gartner (May 2019)

Research

- Technology
- Non-Technical

SPONSOR

Buy-In

$

Sponsor

- Financial
- Governance
- Risk

PILOT

Pilot

- Solution
- Value
- Pipeline

Try-out

Qualified	• Process Granularity • # Apps • # Steps • Non-Critical	Automate Cash Application in *App* from *Bank* for US clients
Realistic	• Investments • Savings • Timeline • One vs Multiple	~150K 3x in 3 years ~12 weeks 1 or 2 tech options
Change Mgmt	• Communicate • Celebrate	Over-communicate Roadshow Recognize Make it Fun

DECISION

Decision

- RACI
- Technology
- Value Tracker

Yay or Nay

Go / No-Go	• Executive as Sponsor • Business Units as Automation Champion • IT as Enabler
Technology	• Hosting, RPA platform, Project Mgmt • Project Mgmt & Demand Mgmt
Process	• RPA Automation CoE Process & Templates • Value Assessment & Demand Prioritization • RACI
Capability	• Inhouse vs Outsourced vs Co-Sourced • Capability and Technology Training

OPERATE

Operate

- Demand
- Deliver
- Sustain

Industrialize

Operating Model	• Centralized (IT) vs Distributed (Biz, IT) vs Hybrid (Biz, IT, Partner)
Demand Management	• Pipeline & Automation Potential • Technology & Security Adherence • Prioritize and Schedule
Delivery Management	• Industrialized & Agile Delivery • Quality Assurance • Production, Stabilize, Sustain
Value Management	• Governance – Projected vs Achieved

EVOLVE

Continuous Improvement

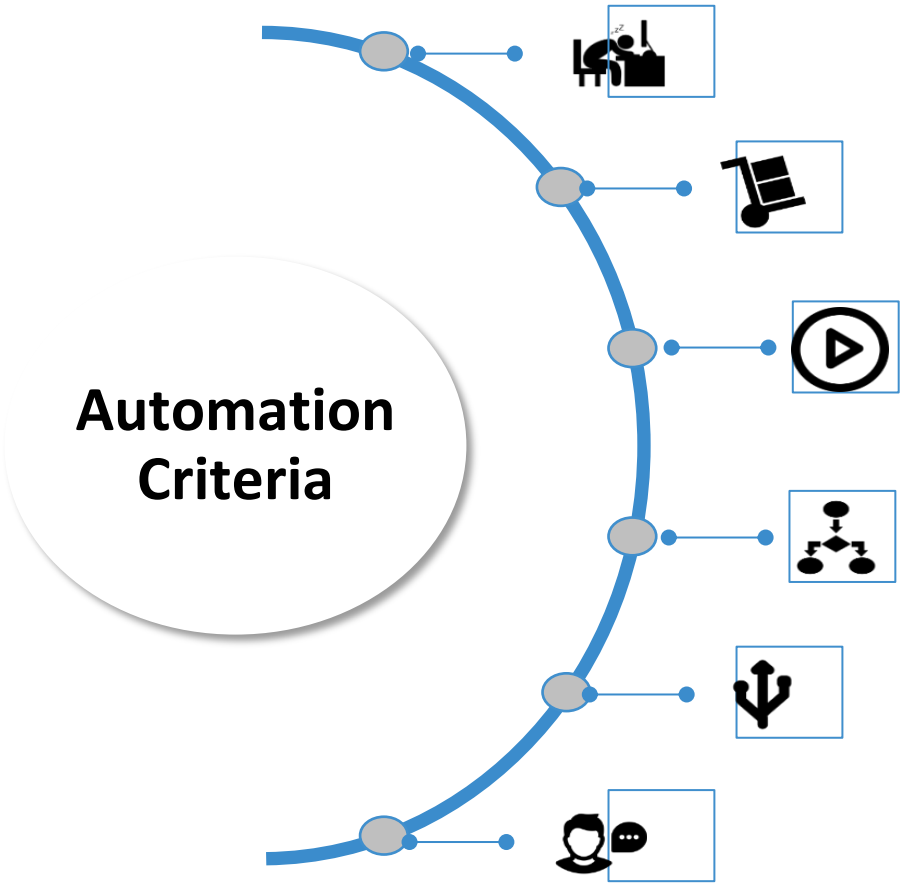
Citizen Developer	• Scale vs Risk
Desktop Automation	• Reach vs Risk
RPA+	• OCR, Process Mining, AI/ML • Process Orchestration, Automated Testing, Data Flow Mgmt, etc
Scale, Speed, Coverage, DR	• Value chain coverage • Accelerate • Process & Technology – Change Mgmt

Evolve

- Citizen Dev
- RPA for RPA

RPA PROCESS SELECTION – LEADING QUESTIONS

Generating Pipeline



Processes that are **Routine and Burdensome**

High Volume Processes

Processes that have **Digital Triggers and Inputs**

Processes that are predominantly **Rules Based**

Processes with **Low Exceptions**

Processes with **Limited Natural Language Interpretation**

Data Extraction	Multiple Data Entry	Manual Processing	Stable Processes	Disparate Systems	High Trx Volume

RPA – GENERATING PIPELINE

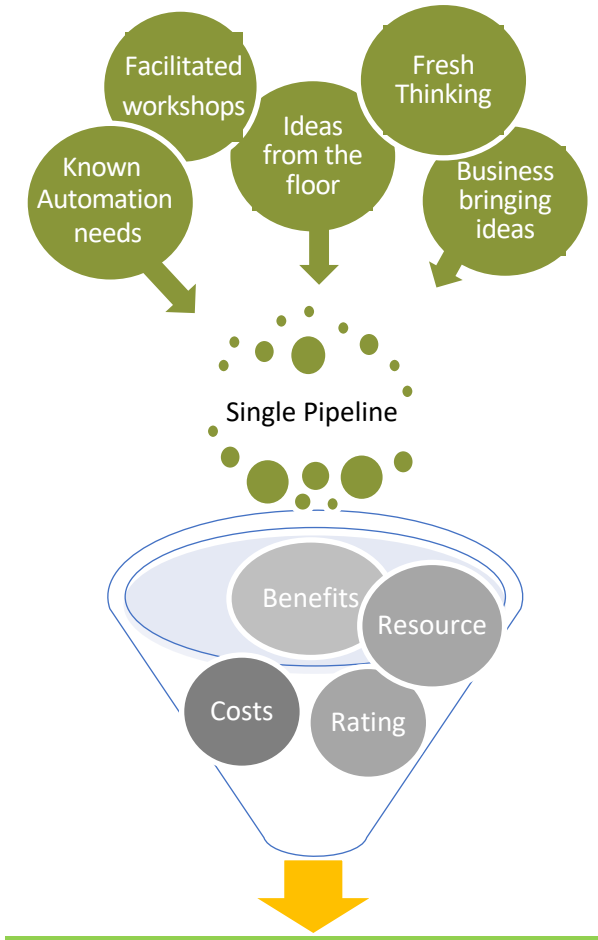
Pipeline

Point of Deliberation	Considerations for Decision
Strategic Automation vs Tactical Automation	**Strategic:** streamlined, ready to automate, visible RoI. **Tactical:** Automating bad process for quicker RoI
Process being Re-engineered / Changed?	If process changing in 6-9 months, then RPA after process change.
Is System Upgrade in Horizon?	If upgrade planned in 12-18 months, consider strategic vs tactical automation
Why automation?	Efficiency; Scalability; TCO; Compliance; Others
Transaction Volume / Frequency	Volume; Frequency; Global / Regional
Value / Savings	FTE Count, Role, Location, Burdened Cost Typical FTE savings should be greater than 2-3 FTEs
Systems Involved	Systems – Internal / External, offline steps (e.g. excel)
Roles Involved	process owner, SME, system(s) owner
Adjoining processes for Automation	Bundle adjoining automation candidates
Granularity for Automation	Too big vs too small – Iterate and learn
Change Management	Manageable? HR aspects? Legal aspects?

Automation Delivery Framework

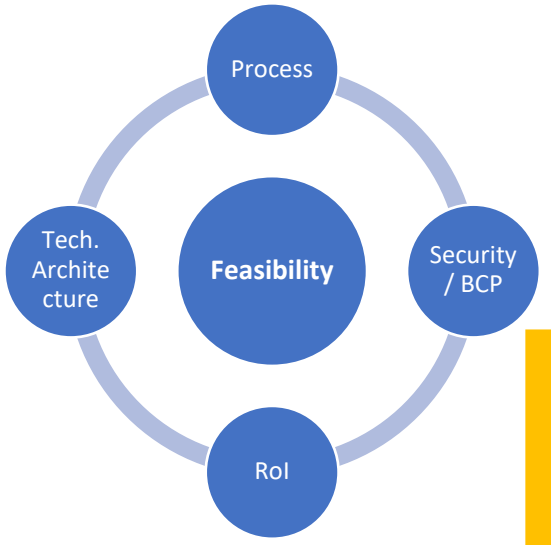
Delivery Model

IDENTIFY



Initial Automation Pipeline

EVALUATE

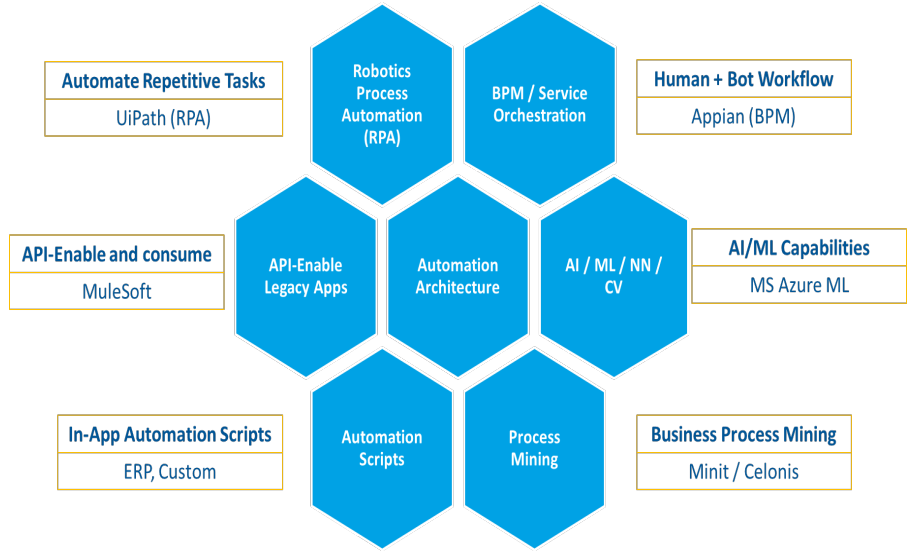


Automation CoE

Technology Committee

Qualified Automation Pipeline

Automation Factory (DELIVER)



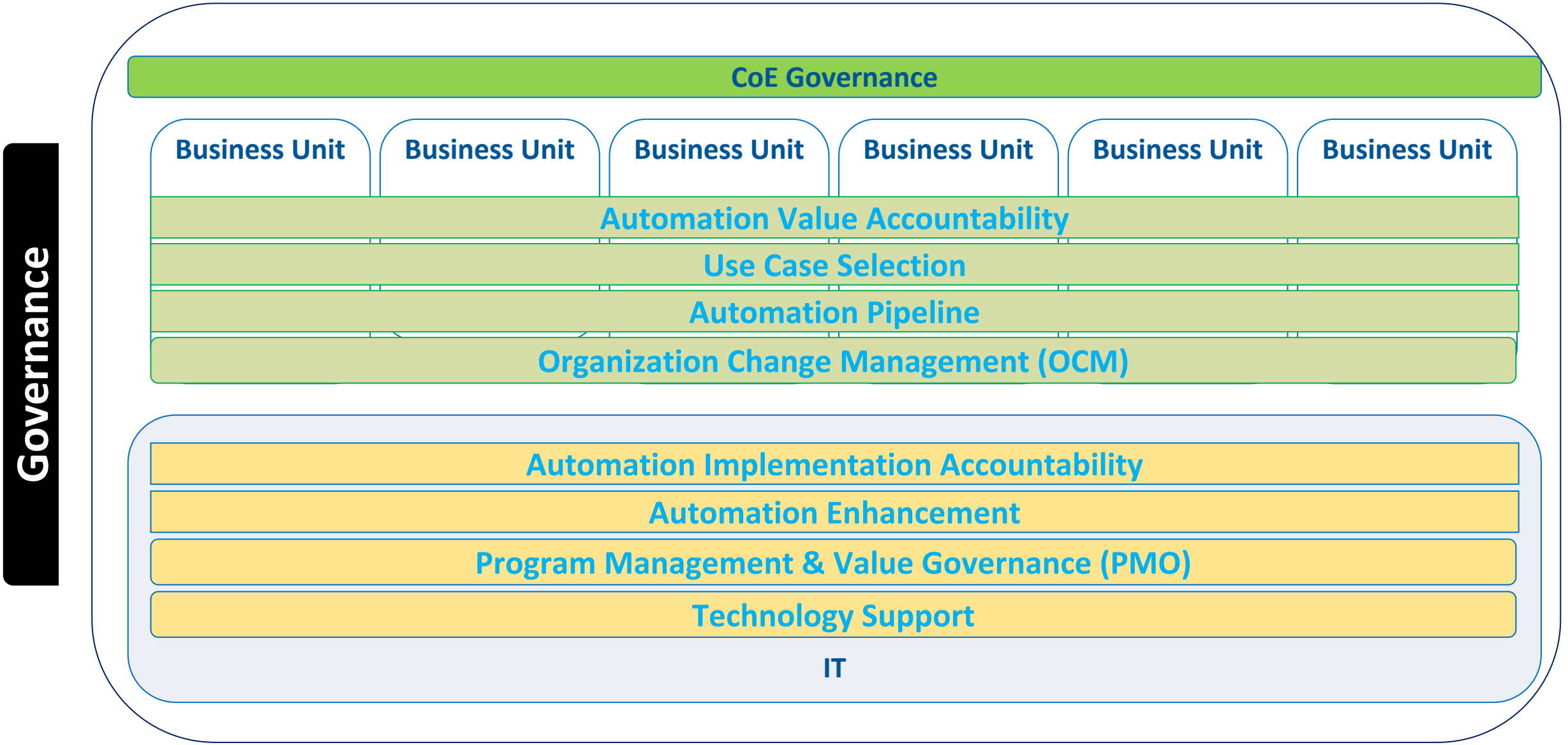
PoC / Pilot

Automated Processes

Continuous Improvement

Value Management

Governance (Example)



RPA GOVERNANCE MODEL – VALUE

Value Framework

Value	Unit of Measure	Initially Projected (Per Year)	Actual Realized (Per Year)	Approved By (BU Sponsor)
FTE Reduction	FTE Count			
$$ Savings	$$ saved			
Error Reduction	% errors reduced			
Cycle Time Reduction	Minutes			
Increase Compliance	% impact			
Staff Satisfaction	% impact			
Human Risk Reduction	% impact			

Quick Re-CAP

Summary

- ✓ Define intended Business Outcomes from RPA Automation
- ✓ Onboard sponsors and stakeholders
- ✓ Research and prepare
- ✓ Pilot realistic use case with 1 or 2 technology options
- ✓ Establish CoE Framework
- ✓ Enable business for continued demand pipeline
- ✓ Focus on projected vs actual value realization
- ✓ Extend the envelope through creativity and imagination
- ✓ Learn and improve