STRATEGY FOR A SUCCESSFUL RPA IMPLEMENTATION

In our experience of implementing successful Robotic Process Automation (RPA) for our clients' businesses, we have learnt some of the best practices, ranging from choosing the right process to automate, to evaluating the return on investment (ROI) and scaling a small RPA solution to a wider Business Process Automation (BPA) programme.

In this white paper; we will look at some of the key aspects of the RPA implementation journey and what you might want to consider when looking at robotics solutions for your organisation.

Automations (robots) can be developed in many ways. Most popular methods involve:

- Using off-the-shelf software providers, like Openspan, Attachmate, Blueprism or UI Path who provide a platform upon which trained users can create automations or;

- Through developing bespoke and custom-coded automations in .net, java, python etc.

Both of these types of solutions offer different levels of agility and offer different features such as extensibility and scalability.

THINGS TO CONSIDER BEFORE START OF ANY RPA PROJECT

Feasibility Checks

Right at the start of an RPA programme, there is a need to analyse the business requirements, forecasting all the possible scenarios, future challenges for adaptations or scalabilities.

Key questions to ask during this process are:

1. **How many members of staff use a computer to serve customers or process data?**

   Automations (Robots) can help businesses be more efficient at allocating and utilising their human resource (FTE- Full Time Equivalent).

   Automations can be used to save anywhere between a few seconds per process or the entire duration of it.

   Consider two scenarios:

   • A robot saving 10% of the time for 50 members of staff each, which equates to 5 FTEs worth of saving.

   • A robot saving 10% of time for 5 members of staff each, resulting in, relatively low FTE saving; based upon the cost of development vs. cost-benefit analysis.

   Obviously, the former gives a better return on investment (ROI) and makes more economical sense, while the later should be avoided unless it gives some other intangible benefits like risk reductions or enhanced levels of customer service.

2. **What is the amount of data to process and number of decisions to make?**

   Robots love rule-driven data processing, while humans often do not. On the other side, human input in emotion-based decision making is irreplaceable.

   The business process should be looked at from a robot's perspective. If a given process has plenty of rule-based extracting or populating data between systems (for example updating customer records), there is a clear an opportunity to automate it.

In some cases, a human emotional decision making is absolutely required (for example responding to a customer complaint), so we can look at automations concentrating on the initial steps like gathering evidence (previous communications, errors in records, financial loss or fraud occurrence as examples), creating a client file, before handing over the final step to a human, for mitigation.

3. **What is the risk of getting something wrong and how severe are the consequences?**

An error in high risk processes like moving money between accounts, contacting customers or maintaining customer records can lead to major consequences like monetary or reputational damage.

It is human nature to make some errors, while robots offer a consistency of service, providing the same level of accuracy 24 hours a day, 7 days a week, 365 days a year.

A perfectly coded, tested and implemented robot, follows the same rules time and time again without any error while maintaining entire audit history and producing on-demand reports of the progress.

In most cases, these intangible benefits are worth more than the FTE savings, to the organisation, and should be prioritised as a key benefit of robotic automations.

4. **What motivates staff within the organisation?**

Often, business areas, within an organisation, which have a core job role of inputting data between systems, resulting in mundane, repetitive tasks and uninspiring roles, result in low levels of job satisfaction, moral and lead to high levels of staff turnover.

Correctly implemented automations with a clear aim of not replacing but empowering and enhancing the work that human beings undertake, can improve the staff retention and team morale.

Cost of implementing RPA solutions

1. **Scoping of the project**

It is not advisable to automate any process exactly as it is done manually. There is always some opportunity to cut down on some steps like forwarding emails, updating excel sheets or authorising printouts, which would not be required post automation.

You would not want to exactly replicate your manual processes with your new robotic work-force. You will want to spend time reviewing all your processes and finding best ways to streamline the processes to automate, even before coding your first automation.

2. Licenses

Several providers charge licensing fees for building robots using their automation studios and charge additional fees for using those robots on pay per use basis.

3. Process documentation

Before any development is started, it is crucial that the end-to-end process is reviewed and documented with the support of Subject Matter Experts (SMEs).

This ensures all the steps, logic and exception paths have been analysed with the developer to assess the level of efforts and complexity. Although the development should be done in an agile manner, this provides a good starting point to deliver a usable/testable product.

4. Developer training and development time

Building a complex robot that can process a tremendous amount of data while connecting with multiple systems at the same time, is not a straightforward task. It requires problem solving developer skills.

If you build robots in-house, you will need to train your staff to use RPA platform software or hire highly trained software developers to custom-code the robots for you, incurring costs while not necessarily knowing the outcome.

5. Testing

Another resource hungry step in the journey to the successful RPA implementation is testing to ensure that the new automation is fit for purpose, error free, scalable and ready for launch. This will use valuable SME time to ensure the product meets their requirements.

There is also a need for the process owner who signs off the product and suggests any amendments, as we know the initial scoping rarely captures the entire process with all possible scenarios.

6. End-user training

Once the robots are developed and ready to launch, there will be a need for HR Learning and Development teams to train the end-users on how to use them.

7. Maintenance of the automations

Finally, we need to factor in the cost of maintaining the solution and keeping it future proof, up to date with changing versions of Windows, Microsoft office and other third party systems like SAP, Salesforce and Backoffice, as examples.

Your core systems will update over time and you will need to ensure that adequate notice of these changes is obtained and communicated with the developer, to ensure that the developer can update/test the automations as required.

ACTIONS - SETTING UP AN RPA PROGRAMME AND ACHIEVING SUCCESS

1. Identify what can be automated

A successful RPA programme should start with proper planning and vision of a clear road map as to where we are now vs. where we want to get to, and the steps needed along the way.

So, the first step is to identify whether the project is worth the effort. You need to analyse the feasibility of automating the processes and systems, factor in the expenses required to setup/develop and maintain automations vs. potential long-term benefits.

2. Set up a team

It is vital to set up an effective project team of developers, testers, project managers, who are overlooked by the project sponsor or scrum master (product owner).

Whether you outsource RPA development or develop it in-house, you will need dedicated staff to ensure that enough resource is available throughout the life of the programme.

3. Software strategy

Once the team is in place, decide on the robotic implementation strategy.

Two main options available are:

- Off-the-shelf RPA software robotic specific solutions/studios – Openspan, UI Path, Blueprism, for example.

- Custom-coded, bespoke software development built using .net (c#)/python and other such technologies

4. Development strategy

Based on your software strategy you will need technically trained staff members to build your robots using either of the method below;

In-house:

Train the staff on robotic software platforms so they can develop and maintain the robots or train the staff to become software developers, to allow them to custom-code the development.

Sometimes there may be a need to hire an external contractor to provide this training.

Outsource: This can be either on robotic software platform or bespoke developed solutions

Assign the development of robots to RPA developer of external software engineers/ software house.

5. Implementation strategy

This is where you will decide how you will host the robots whether being on your own company servers or through external provider on third-party servers. Each of these options have pros and cons depending on the organisation's needs, security of the data, speed of the servers, disaster recovery options and more. These should be considered while making this decision.

• Some automations can run on desktop computers such as, **Robotic Desktop Automations (RDA)**, and replicate users' actions to achieve the automation.

• While other solutions can be hosted on a remote server **(RPA)** and run autonomously at set intervals or triggered remotely,

Both of the above types can provide features like continuous updates, audit trails and on-demand reports.

6. Operational strategy

All ongoing work should be managed in one place, this includes new processes, change requests and bugs/errors.

This should be regularly reviewed and assessed to adapt with the business changes and prioritised based on severity.

7. Identifying the processes to automate

Once all of the above is in place, we can get started with identifying, prioritising and developing the robots for processes.

Obtain the list of all viable processes and triage – "high volume - low decision" processes can be built quickly, and they offer high ROI. On the other side, more complex processes can save some time/reduce several risks but in turn require longer development/testing.

8. Documentation (Statement of Work)

Before the development, you should engage with the SMEs and developers and walk through the process steps, streamlining the logic and decision paths and cut down the unnecessary steps.

It can also be beneficial at this point to design a conceptual diagram (flow-chart) showing a process flow covering movement of data between systems and the automation.

9. Evaluation

Identify what evaluation criteria are required to measure the success of the programme, how the management information (MI) will be captured and what on-demand regulatory or operational reports will be required so that these functionalities can be built in.

An important aspect of this process is having a starting point to measure the current way the process is being carried out.

This includes capturing where relevant, the number of errors, time taken per iteration and risk flags so that they can be compared with the new automation, giving a clear and precise view of the benefits achieved.

10. Develop new robots

Whether using off-the-shelf solutions or building custom-coded bespoke solutions, it will take time and high level of technical skills to implement the steps required to automate your processes. Even with record/play features you will inevitably require advanced concepts/custom decision paths to achieve the exact functionality that you need.

Custom coded solutions can be harder to start with but if done correctly, they ensure no reliance on third party software giving more independence and agility. Custom-coded RPA solutions have greater coverage of developers in the market. For example, it is easier to find c#/python developers with transferable skills, so there will always be plenty of resource available to maintain them further.

Using off-the-shelf products mean that the automations can be built relatively quickly with little development knowledge as most of these products have considerable library of useful automation scripts, so no prior knowledge of how to automate web browsers, SAP or other windows applications is needed.

11. Maintenance of the robotic workforce

Even with an organisation's current automations there will be bugs, issues and exceptions so the robots will need to be maintained to take account of these. Therefore, you will need to keep resource available to resolve these issues quickly.

Automations are a fantastic way of driving efficiencies in your business however, they will increase your operations reliance on technology and will need to be kept updated.

12. Maintain backlog of features in a roadmap

Lastly, you will want to maintain a backlog of future ideas. To continuously see benefits and have the competitive edge over your competitors, you need to manage your current work-stack with new potential ideas that come in.

Seeing the automations in action, will always prompt new ideas.

COMMON MISTAKES TO AVOID IN RPA IMPLEMENTATION

1. Tackling the wrong process

Most processes can be automated, however conducting a robust cost-benefit analysis upfront can increase ROI on the chosen processes.

2. Not having dedicated members of staff

You will need dedicated members of staff who have expert knowledge of the systems and processes to automate with keen eye on operational efficiency and accuracy targets, to oversee the implementation and manage all new/outstanding work.

In addition, you will also need to allocate some dedicated time from SMEs and front-line users and other stakeholders, this can be challenging as they will have their current work-stacks.

Failing to plan this valuable resource in advance, can lead to unnecessary delay in completion of the project and affect the ROI of the RPA.

3. Trying to automate every step in a manual process without streamlining it first

The processes with high volume, low decision making, set rules and overall lower complexity have the greatest potential of ROI. Automating your most troublesome processes can just move the existing problem from user to the robot. Most of the time the processes can and should be streamlined before automating.

Simply replicating the exact manual process into automatic process is never the best way.

4. Not identifying all potential automations

RPA is a new technology with boundless potential. Not everybody can be aware of which systems and processes can be automated. Failing to do a thorough investigation and consultation with the RPA provider to understand the 'art of the possible' upfront can lead to some missed opportunities.

5. A diversified robotics strategy - covering long term as well as quick wins solutions

You should look at all your processes that contain a mix of steps which can be fully automated, be it complex, self-sufficient remote RPA solutions on server side or a simple desktop automation (RDA) that can make a huge difference in front-line staff's ability to serve the customers better, with significant ROI.

A true business process automation (BPA) can be achieved with a thorough blend of different implementations of RPA and RDA after leaning and streamlining the business processes.

IDENTIFYING THE BENEFITS TO LOOK FOR AT THE POST IMPLEMENTATION REVIEW:

1. **Efficiency improvements**

   The biggest and most highlighted benefit of RPA, providing true sense of ROI in tangible terms.

   Other examples include:

   - Dramatically reduced process timing,

   - Running robots on out-of-office hours schedules and;

   - Cost avoidance of hiring additional staff to meet a demand of business change caused by competitor actions, market conditions or regulatory commitments

2. **Customer Satisfaction**

   In an ever more competitive environment, customer service has never been so paramount.

   Examples of benefits include:

   - Reduced waiting times (improved Service Level Agreements – SLAs)

   - Reduced average handling times (AHTs) in call centre – making staff available sooner to serve next customer

3. **Reputational risk reduction and mitigation steps**

   Robotics can maximise the reach and effectiveness of the business risk management controls throughout the organisation, without the need for expanding these departments proportionately.

   Some of the best examples include:

   - Reduction in complaints and escalations

   - Reduction in fines

   - More control and reporting of system and human errors

- Automatic compliance and regulatory reporting (example GDPR, FATCA, Sanctions, Transactions monitoring, AML)

- End to end audit trails

- Automatic backups

- More robust disaster recovery steps including time-machine archives and reversal of steps

4. Quality Assurance and Accuracy

Robots do not get tired, become ill or take holidays. They work with the same efficiency and accuracy standards on a Friday afternoon at 4:45 p.m. as they would do on a Monday morning at 9 a.m.

Examples of additional benefits include:

- On demand reports

- Error catching, highlighting and auto-corrections

- System prompts allowing humans to make better, informed decisions even in manual processes

5. Improved staff satisfaction/retention

Contrary to the popular perception that the robots are here to replace humans, the reality is that the robotics actually empowers the individual by removing more mundane, repetitive tasks on their jobs, freeing up their time to add significant value through the skill-set which they offer.

This often leads to higher staff retention rates as staff feel valued within their given roles.

CONCLUSION

Robotic Process Automations are beginning to have a profound effect on all aspects of organisations.

In the longer term, RPA means people will have more interesting work which will rely on human emotional or cognitive decision-making virtues.

Instead of filling mundane forms, sheets and documents, staff will be able to click the button and see the process complete, while finding the opportunity to add value to the organisation with their better skill-set.

We hope that this document serves as a good introduction to the Robotic Process Automation and the journey to its successful implementation.

Our Team

Martin Keelagher
Chief Executive Officer   in y

With years of experience in business development and strategy planning, Martin directs our business to achieve and surpass new horizons working closely with our clients and delivery teams.

Ronak Halani
Chief Design Officer   in y

Ronak is highly experienced in solutions architecture and product design. At Agile Automations, Ronak is responsible for our implementations from concept to delivery.

Daniel Holgate
Chief Technology Officer   in y

The architect and power-house of innovative solutions, Daniel leads our Agile Development teams and delivers bespoke custom-coded solutions.

About Us

Our Vision

At Agile Automations, we have a vision of a future where robotic processes are used to revolutionise the roles and requirements of the future workforce.

Just as we have seen robots revolutionise the manufacturing industry by creating higher production rates, improved quality and cost savings, Robotic Process Automation (RPA) is revolutionising the way we think about and administer business processes, workflow, infrastructure, administration functions and customer service.

Agile Automation's solutions, provide dramatic improvements in accuracy and cycle time and increased productivity in transaction processing while it elevates the nature of work by removing people from labour intensive, repetitive tasks, increased productivity and customer experience, both internally and externally.

Our Location

London, Manchester (United Kingdom)
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With our headquarters in London and regional offices in Manchester and Jersey, we serve an international client base.

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