



PROCESS SELECTION 101



Workshop B
January 16, 2018

The background of the bottom section of the slide is a light blue circuit board pattern with various traces and nodes.

Global Management Consulting & Advisory Services

Shared Services

From Business Case to Implementation, plus correction & optimisation of existing operations



Robotic Process Automation

Automation assessment, proof of concept, vendor selection & provider of IA solutions



Business Transformation

“Back office” transformation, M&A integration, organizational design recruitment & training



Enterprise Wide Security

Plus Business Continuity Planning, assessment & implementation



1

Who We Are

Founded 2006, headquartered in California, global offices

2

What We Do

Evaluations & assessments, strategic advice, project management, implementation support, process and market expertise

3

Where We Focus

Finance, Human Resources, IT, Procurement, Facilities, Customer Operations & other functions

4

The Chazey Difference

Practitioners first, staff continuity, high ROI, knowledge transfer, client engagement in transformation

Enablement Through Transformation:

Core Transformation Discipline

Over a decade helping clients transform

- Shared Services, Outsourcing & Technology Enablement
- Operational Efficiency
- Improved Quality of Service
- Improved Control & Compliance



Enhanced by Robotic Process Automation

- Consult, train & integrate automation solutions
- Well placed to understand & meet clients needs
- Understand strengths & weaknesses of vendors & tools
- RPA Vendor Partnerships
- RPA tool agnostic



01

How to assess opportunities for automation across the business, and identify low-hanging fruit

02

How to identify what you 'should' automate, rather than what you 'can'

03

Assessing whether to hit the ground running with an imperfect solution, or wait and go with a more robust solution

Break

04

Choosing a process for a PoC/pilot. Identifying the quick and easy wins.

05

Deciding between 'attended' and 'unattended' RPA for your processes

06

Determining whether to draft external help or build your own internal capability from scratch

- ❖ Name
- ❖ Company
- ❖ Role
- ❖ RPA journey stage:
 - ❖ Exploring (***What's a bot?***)
 - ❖ Pre-Launch (***Which bot first?***)
 - ❖ In Pilot / POC (***We got a bot!***)
 - ❖ Maturing (***Lots of bots***)
 - ❖ How many bots in production?
- ❖ Your expectations / questions to answer for the RPA Congress?
- ❖ Your expectations for this Process Selection workshop?

01

How to assess opportunities for automation across the business, and identify low-hanging fruit - 12:45 – 1:05

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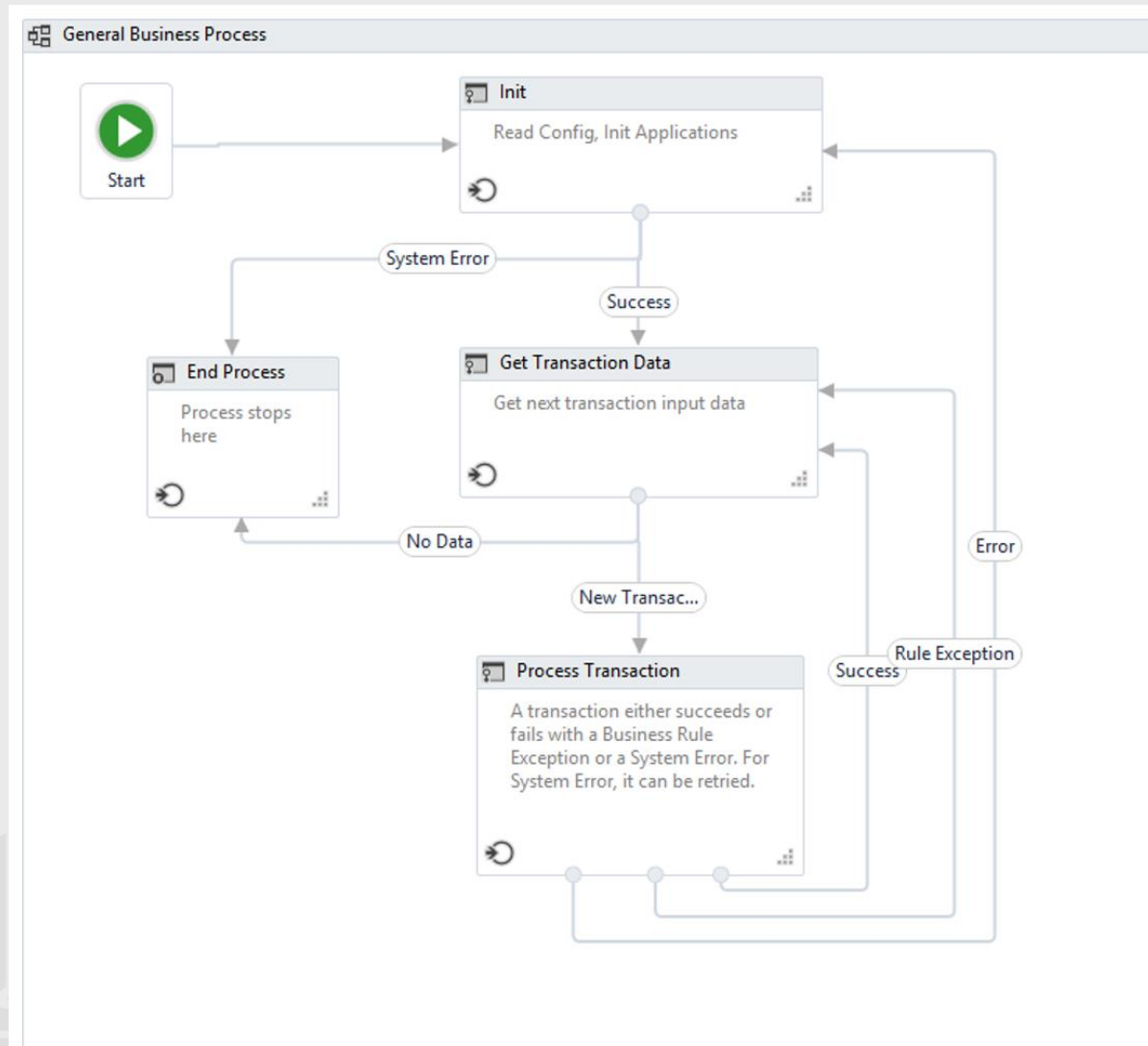
Determining whether to draft external help or build your own internal capability from scratch

When considering what activities may be suitable for automation, select those meeting these basic criteria...

Automation Suitability Factors

	Repetitive	
	Manual	
	Routine	
	Clear Rules	
	Structured Data	

UiPath Structure Framework



- Functional area?
- Potential candidates?
- What could be “low hanging fruit”?

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How to identify what you 'should' automate, rather than what you 'can' - 1:05 – 1:25

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RPA Phenomenon...Common Myths...& Realities



Replacement of entire jobs



Replacing mundane tasks

Have to automate end-2-end for real ROI

Great successes & ROI from only partial process & activities

Benefit is reduction of heads & labor cost only

Benefits of value, quality, customer satisfaction & more

Can onshore jobs previously offshored

Reduction of offshore manual activities & responsibilities

Operational staff won't support due to job loss threat

Staff welcome opportunity to reduce manual & mundane

Use Cases - Automation Heat Map

Process Automation Suitability Map



KEY:

- High Automation Potential
- Medium Automation Potential
- Low Automation Potential

Note: Average indication for initial assessment & guidance only, actual suitability varies and dependent on automation suitability factors and the tasks involved.

Blue Prism use case examples of implementing RPA within Record-to-Report process areas

R2R – Blue Prism Process Examples

- **Eform extraction**
- **VAT reporting**
- **Accrual support**
- **Audit support and validation**
- **Fixed asset amortization**
- **FX accounting and write-offs**
- **Cost accounting and Purchase Orders**
- **Bad Debt write-offs**
- **Inventory write-offs**
- **Month end close heavy lifting**
- **Journal entry accounting**
- **Credit note accounting entry**
- **Accrual booking**
- **Pricing reviews**
- **Freight accruals and transport costs**
- **Fraud detection**
- **Account cleansing**

- **Likely criteria for your company:**
 - Eliminate mundane tasks
 - Build capacity
 - Give back time to the business
 - Improve service to internal and external clients
 - Improve compliance
 - Other?

- **How might you set up a decision process / governance?**
 - Who could / should you include?
 - Who gets a vote?

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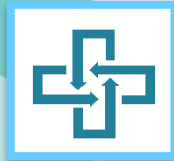
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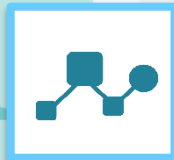
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Lessons Learned & Best Practices



Transform

Don't just Automate, look to also **“Eliminate; Simplify; Standardize”**



Why, What, When

Have clear objectives & follow strong project management disciplines - also helps when selecting vendors/tools



Engagement & Expectations

Key stakeholders, decision makers, influencers, from the start



Operating Model & Governance Framework

IT security policy & managing the digital workforce essential

- Reasons to go faster?
- Reasons to go slower?

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Break - 1:45 – 1:55

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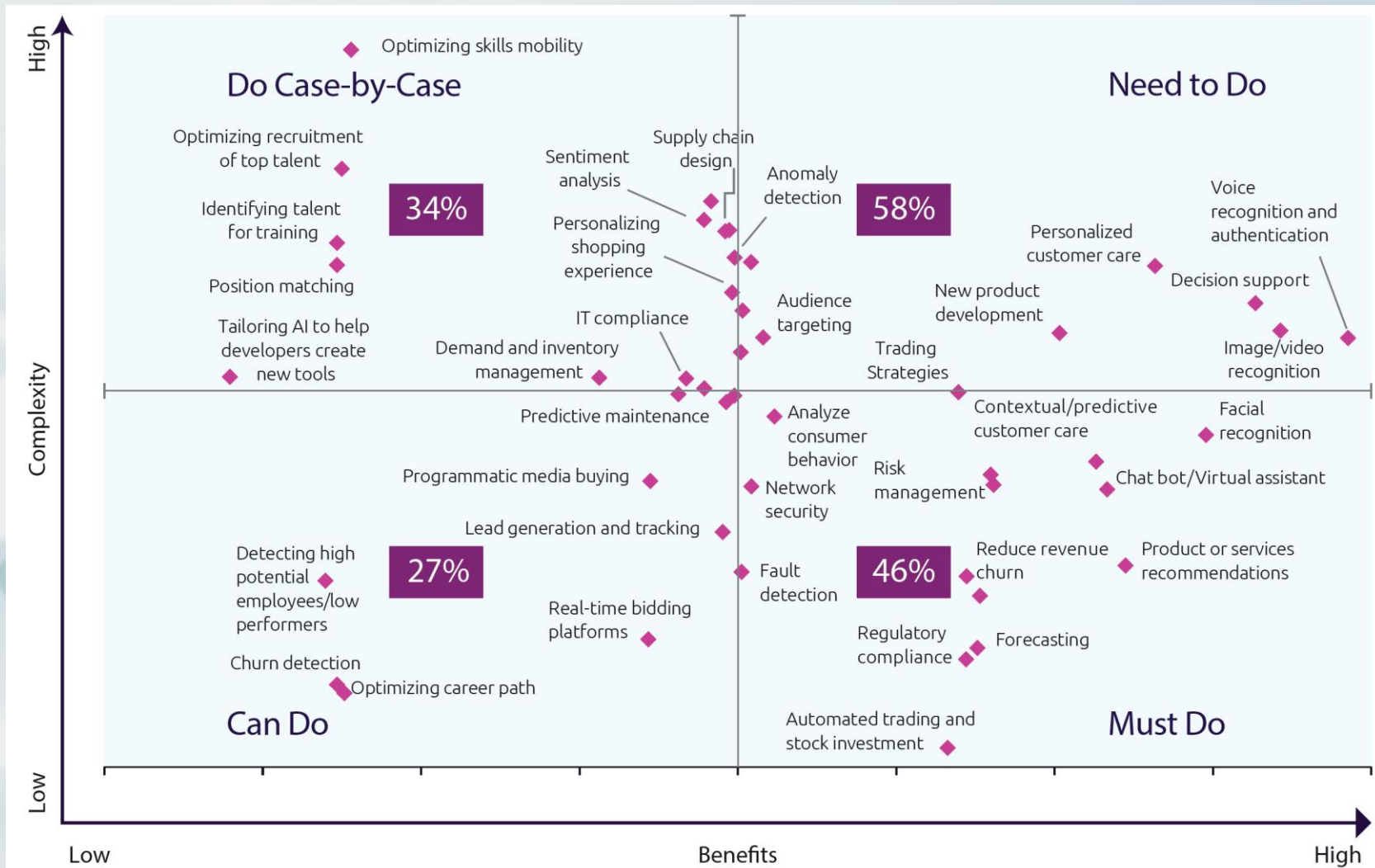
Choosing a process for a PoC/pilot. Identifying the quick and easy wins - 1:55 – 2:15

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Source: Capgemini Digital Transformation Institute, State of AI survey, N=993 companies that are implementing AI, June 2017

- Mature: in hindsight, I wish I had...
- Launching: at this point, my best guess...

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06

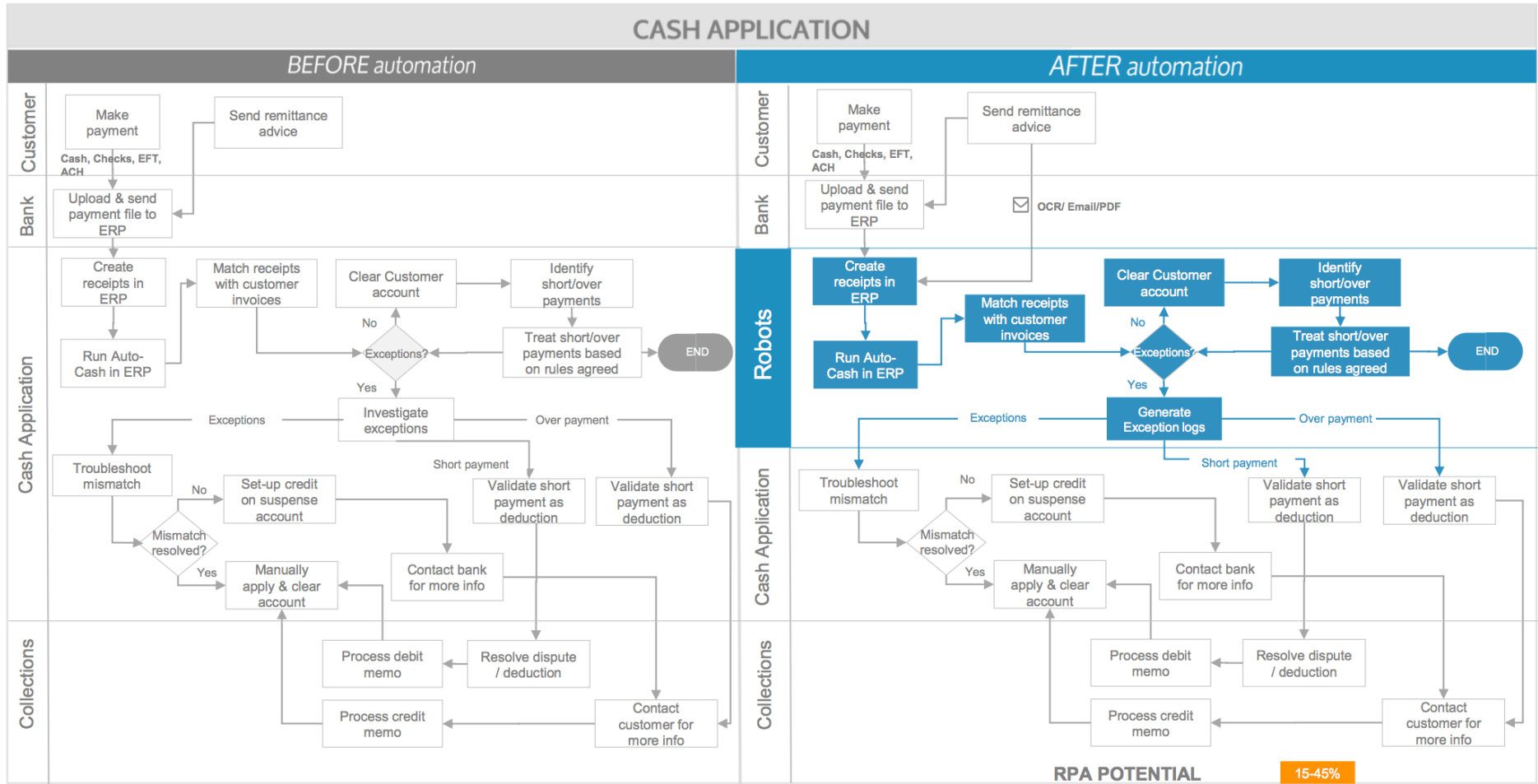
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Attended Example

A UiPath use case example of implementing RPA within Cash Applications process

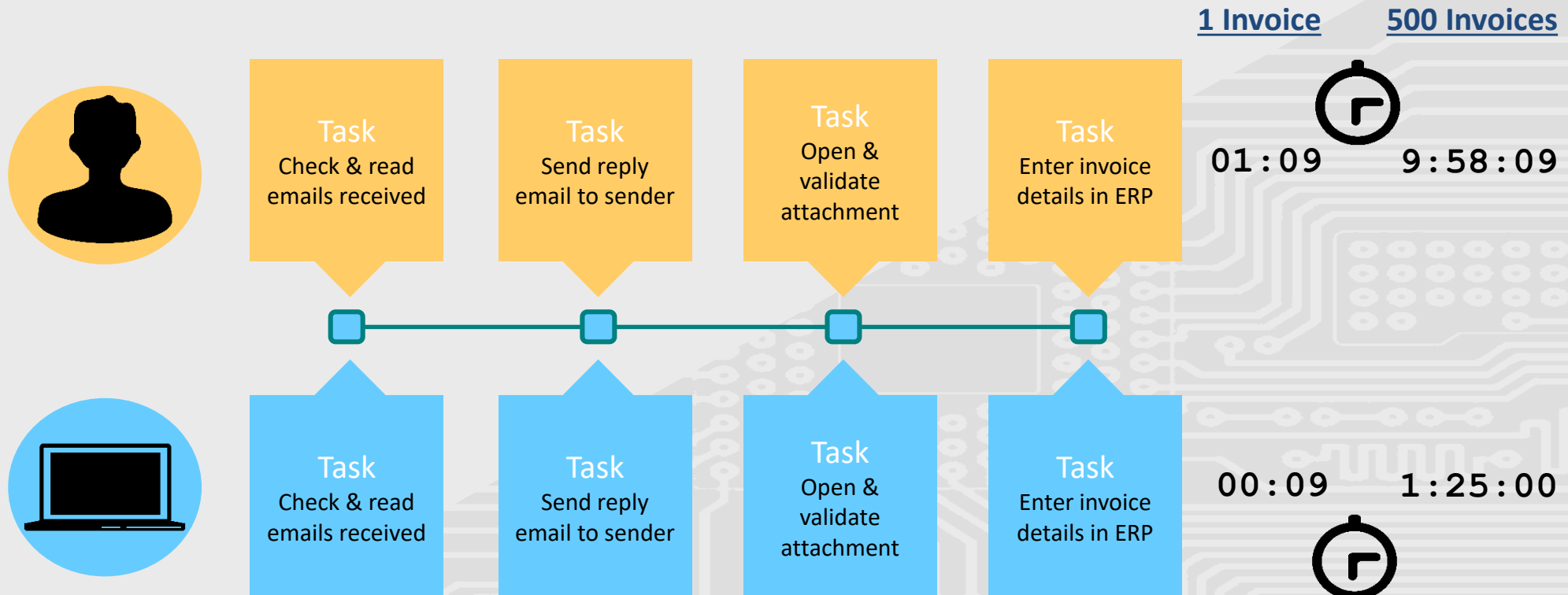
AR Automation scenario

32



Unattended Example

Use Case - Simple Data Capture & Record



**Potential +8 hours
Productivity**

- How might you differentiate?
- How will you manage handoffs?
- What if your bot “calls out sick”?

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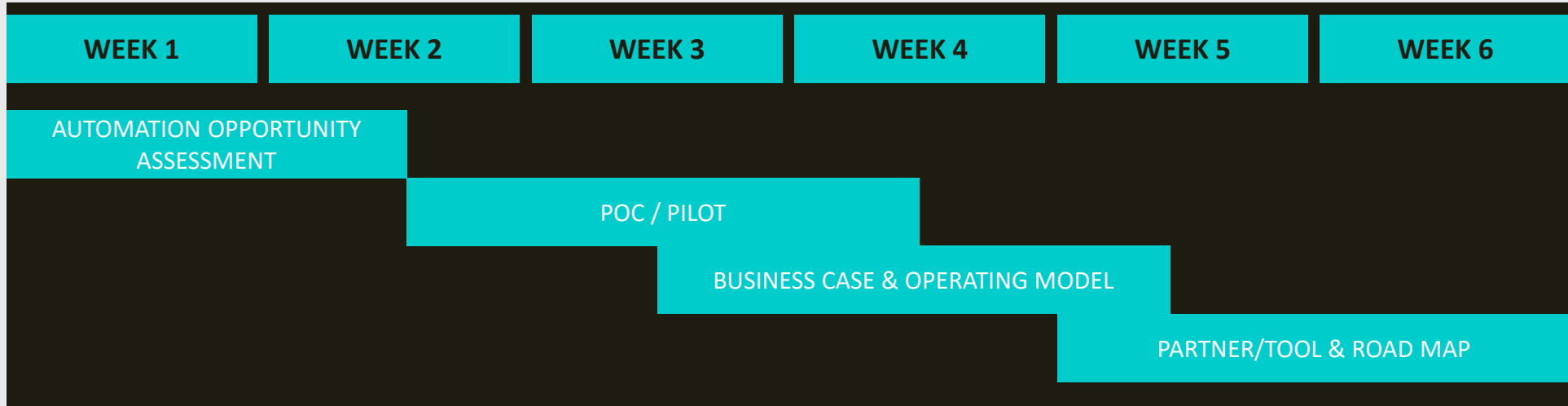
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Digital Transformation – Ready to Launch



> AUTOMATION OPPORTUNITIES

Assess extent of activities suitable for automation & document. Define metrics, measures, benchmarks and baselines and consider what other transformation opportunities are available from eliminating, simplifying and standardising.

> OPERATING MODEL

Finalise RPA governance framework, clarify future roles & responsibilities for automation teams. Evaluate options and impacts for onshore / offshore processing.

> PROOF OF CONCEPT

Determine whether POC or pilot required. Implement the POC/pilot bots, monitor, measure and report the outcomes and results and define an appropriate governance framework.

> SOLUTIONS & VENDORS

Confirm automation objectives & roadmap requirements, parameters for pricing, support/maintenance, development. Weight the assessment factors accordingly.

> BUSINESS CASE

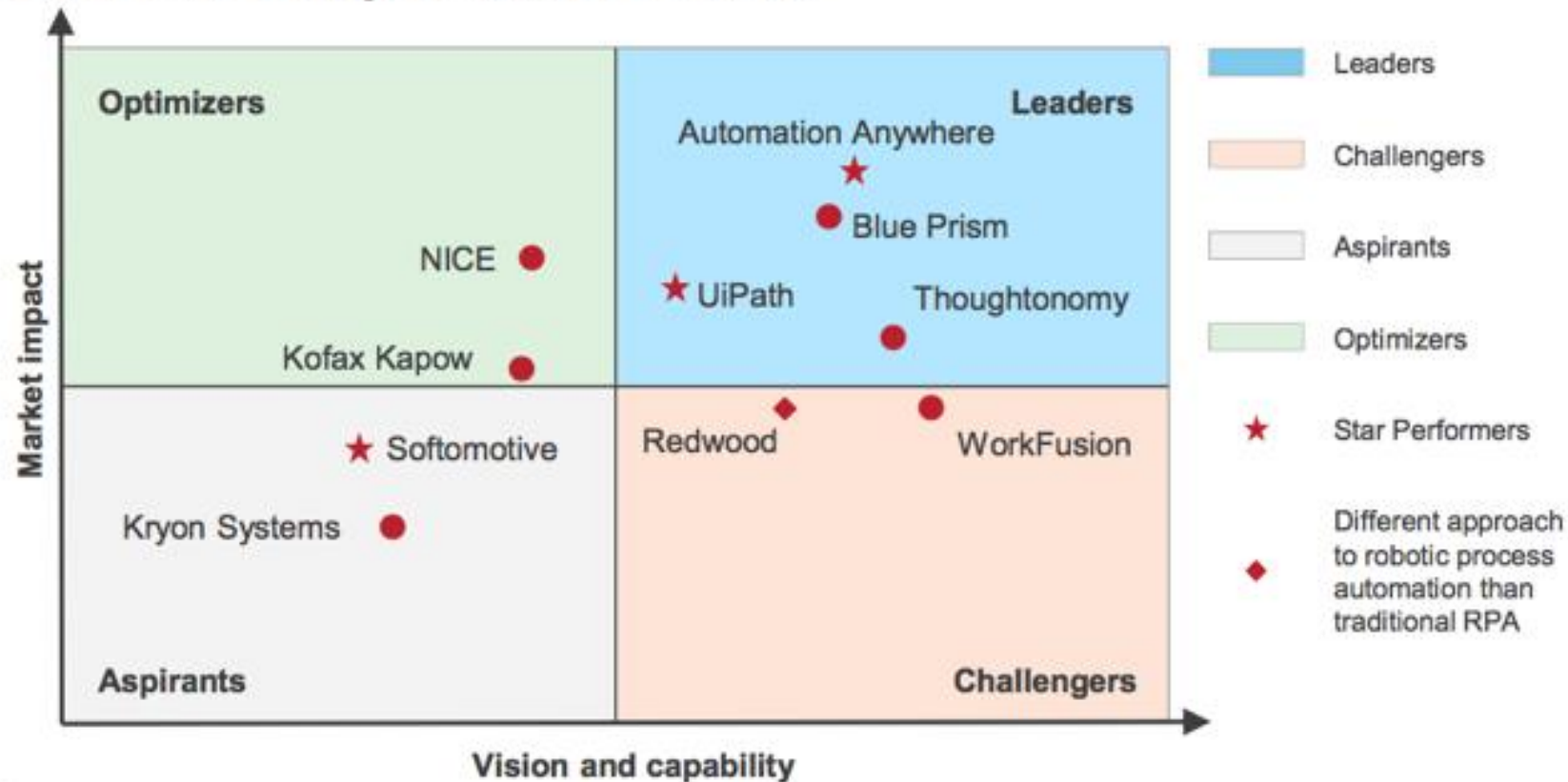
Quantify and estimate expected costs, savings, value, ROI & timelines. Plot the expected utilisation and redeployment of resources and define future expansion of services.

> ROAD MAP

Based on required timelines, scope & business case. In first waves prioritise breadth rather than depth and target simpler processes with higher returns.



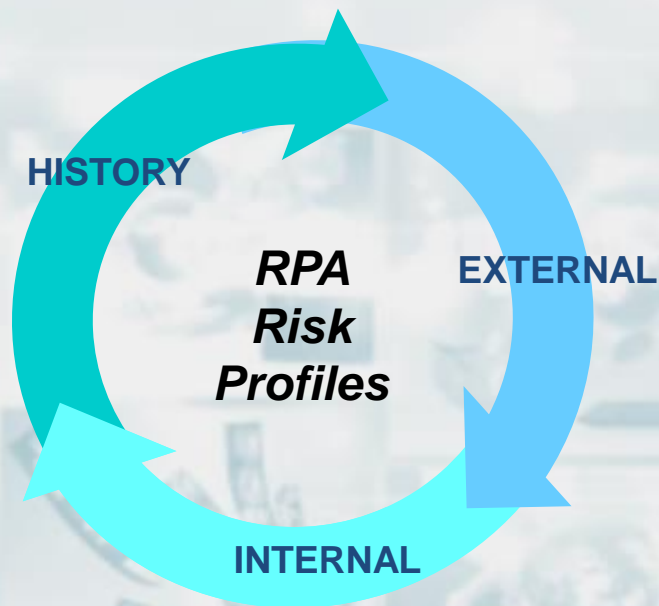
Everest Group RPA FIT Matrix



Source: Everest Group - RPA FIT Matrix - Competitive Landscape of RPA Vendors

- ❑ **HR** – Bots?; Morale; “Managing” the Digital Workforce – messaging and communications
- ❑ **IT** – Security; Provisioning; Standards; Change Control – determine role in enablement, governance
- ❑ **Executives** – Establishing the Digital Transformation Vision and Pace – how far, how fast, with what investment
- ❑ **Supervisors / Coaches** – Managing a hybrid work force – daily operations, handoffs and new possibilities
- ❑ **Employees** – “We’re doing what?” “What about my job?” – transparency and engagement are key

High Level: Project Management Disciplines; Low Experience of Automation; Automation Deployment too Large Scale to Begin



History - IT success/failures; Relevant IT/RPA experience; Organizational

External - environmental pressures; maturity of technology; chosen supplier/consultants; competitor use of RPA

Internal - Organizational characteristics (strategy, structure, reward system, human resources, management); Employee relations; IT infrastructure & management; Changing business needs

- In general, need to manage both the actual possible “**hazard**” of risks and the extent to which people **may or may not be impacted** (upset/outrage)
- Remember though, that RPA is different from traditional forms of IT, and the risk profiles may differ slightly:
 - RPA doesn’t require traditional IT programming skills, instead is configured through **easy-to-use design interface** by business/operations people
 - RPA is non-invasive by interacting with existing systems through the user interfaces, typically via a RPA user ID and password, therefore **enterprise safe**

RPA Risk Management - Mitigation Strategies



Risk Category	Major Risks	Action Principles to Mitigate Risks
Strategy	Missing value by not understanding “triple-win”, thinking too small and short-term, funding too little (especially resources), viewing automation as only a tactical method of cutting costs, messaging automation as a way to cut jobs	<ol style="list-style-type: none"> 1. Conceive of RPA as an enabler of a larger business strategy 2. Cultural adoption by the C-suite 3. Consider RPA for more than just cost savings - change how work is done 4. Decide who is best to ‘own’ the automation program
Sourcing Selection	Missed value or excessive costs by choosing the wrong sourcing model or wrong advisors/partners, or choosing them too late after going-it-alone, getting locked in to BPO providers or tools	<ol style="list-style-type: none"> 5. Use credible advisory firms to bridge gaps in client knowledge 6. Incentivise BPO providers to share the benefits of automation
Tool Selection	Choosing wrong tool(s), too many tools or bad tools	<ol style="list-style-type: none"> 7. Match tool capabilities with strategic objectives 8. Consider overall value of tool capabilities, not just price 9. Have IT help / involved in vetting the software 10. Test tool capabilities with a controlled contest 11. Select a software provider with sound financial position and stable customers
Stakeholder Buy-in	Stakeholders ignore, stall, resist or derail the automation program	<ol style="list-style-type: none"> 12. Involve IT from the start 13. Communicate the value of automation to employees 14. Promise no layoffs as a consequence of service automation; ratchet down headcount gradually instead 15. Select ‘rising stars’ for service automation projects 16. Redesign employee scorecards
Automation Launch	Initial projects fail technically, financially or politically	<ol style="list-style-type: none"> 17. Select ‘wow’ projects based on impact to customers and employees 18. Build realistic business cases 19. Redesign human work for robotic work 20. Consider the Pareto principle
Change Management	The robots do not function as intended, as business rules evolve or IT interfaces change the organisation fails to adapt RPA	<ol style="list-style-type: none"> 21. Make sure the robots are work-ready & manage the robotic workforce 22. Clear project structure, ownership and communications path 23. Assign clear boundaries of responsibility
Road to Maturity	Automation momentum stalls from champions leaving, skills shortages, underutilising software robots, integration issues emerge as new technologies adopted	<ol style="list-style-type: none"> 24. Establish a Centre of RPA Excellence 25. Rethink talent development for skills needed for enterprise automation capabilities 26. Multi-skill the software robots 27. Reuse components to scale quickly and to reduce the development costs 28. Continually improve existing automations 29. Integrate tools to automate services end-to-end 30. Establish a Centre of Automation Excellence

Benefits to Adopters



- Cost Reduction
- “Hours back to the business”
- Cost Containment / Avoidance
- Political Advantage - on-shoring opportunity
- Value Adding
- Revenue Generation/Leakage Control
- Customer & Employee Satisfaction
- Efficiency & Productivity
- Control & Risk Management

Benefits vs Other IT



- **Ease of Use** limited programming skills
- **Ease of Implementation** “light” touch, with underlying systems undisturbed
- **Lower Cost-Higher Return** significantly lower economic business case
- **Workforce Flexibility** “bots” switch between tasks
- **Workforce Availability** “bots” run 24 / 7 (in theory)
- **Quality, Accuracy & Consistency** same task, same way, same time, same quality

➤ Engage external help?

➤ Pros

➤ Cons

➤ Build internal capability from scratch?

➤ Pros

➤ Cons

- **Engagement, communication** and **support** is essential to mitigate all risks
- Business operations as **owners** of RPA, not IT
- Avoid an over-focus on technical efficiency & outcomes and under-resourcing of process issues
- Ensure people are **trained** and **motivated** to be fully committed and competent to **configure, deploy** and **gain benefits** from RPA
- Build RPA experience over time and feed into the **continuous improvement** processes
- **Align** RPA strategy with the wider strategic objectives of the organization
- Aim for the '**Triple Win**' (shareholders, customers, employees)

Leverage our Experience for Your Success



To learn more: www.chazeypartners.com



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