



Build an RPA Strategy for Your SSO Operations

CHAZEY PARTNERS

Who's Who

Name | Company | Role

RPA: Exploring, Launching, Growing,
Scaling?

How many bots in production?

Have a Center of Excellence (CoE)?



INTRODUCTION



Global Management Consulting & Advisory Services

1

Who We Are

Founded 2006, headquartered in California, global offices, extensive work in Latin America

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

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 RPA solutions



Business Transformation

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



Enterprise Wide Security

Business Continuity Planning & Organizational Cybersecurity



Enablement Through Transformation



Core Transformation Discipline

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



Enhanced by Robotic Process Automation

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

Who We Have Worked With

OUR CLIENTS



WHERE WE COME FROM



Agenda

Build an RPA Strategy for Your SSO Operations

1

Identify and
Assess
Opportunities
for
Automation

2

Operating
Model &
Governance
Structure

3

Collaborating
with Business
Units & IT

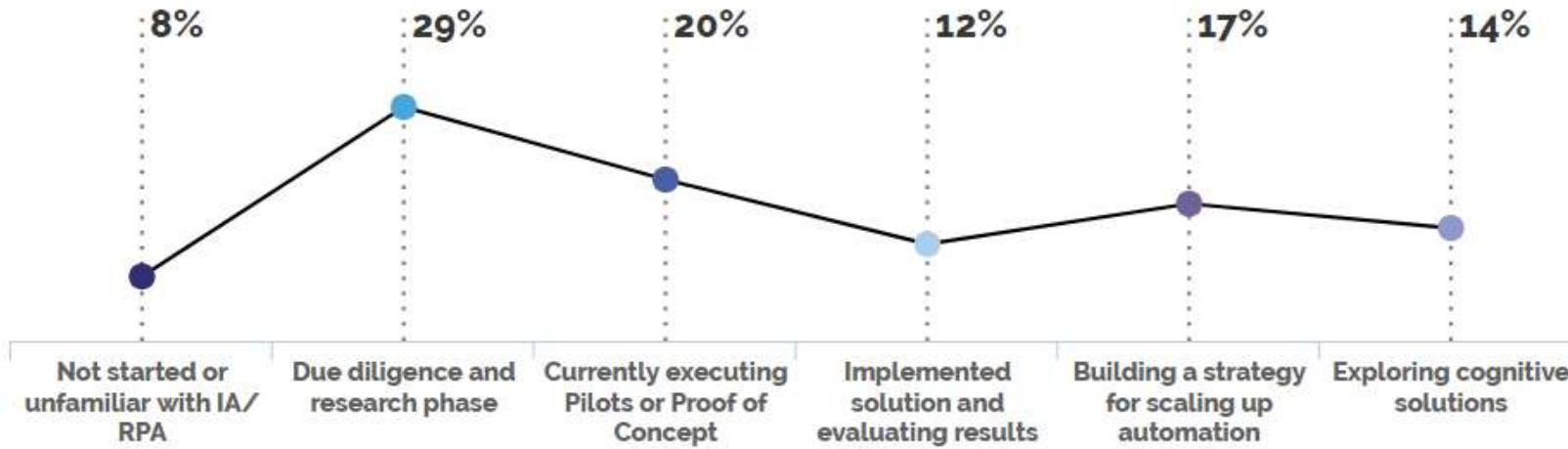
4

Deploy &
Maintain
Bots

Preface

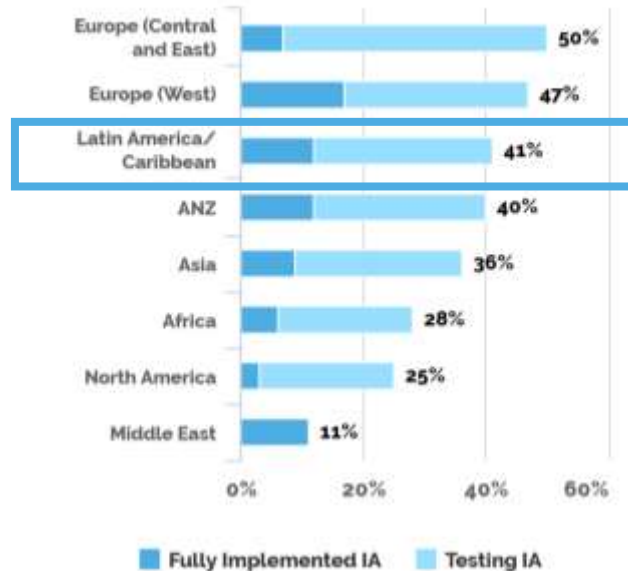
Definitions and Current State

How advanced are Latin American Shared Services in process automation (IA/RPA)?

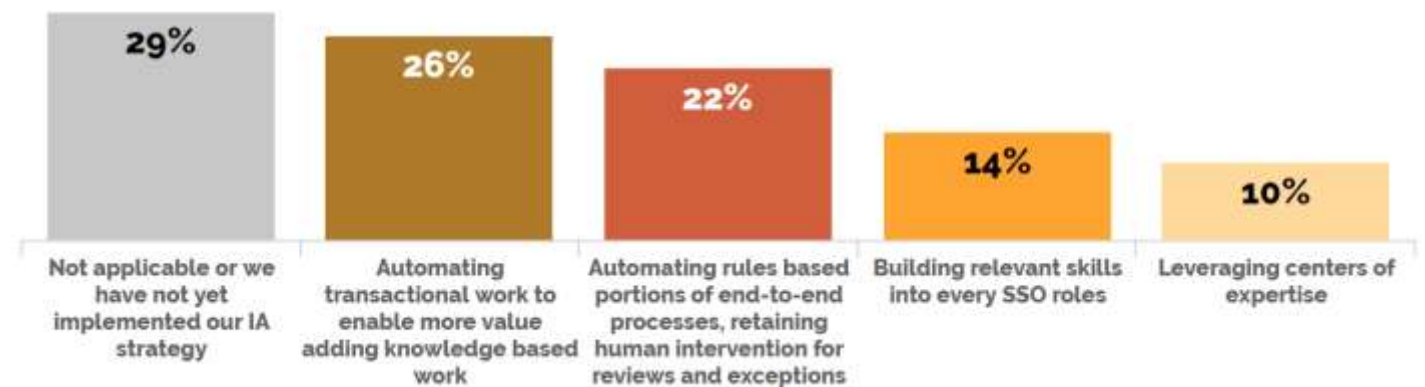


Current State

RPA Maturity By Location of SSC



Preferred strategies to drive performance and benefits from process automation



Key Concepts

1 Robotic Desktop Automation (RDA)

- Optimizes existing manual and fragmented processes for agents
- Reduction in low value add manual processing by workforce

2 Robotic Process Automation (RPA)

- Removes need for agent input
- Drives significant increase in process speed and cost reduction

3 Digitized RPA

- Self-serve via mobile, web, IVR, speech recognition
- Robots fulfil requests with no human intervention and update customers with progress slashing query volumes

4 Machine Learning

- Combination of robotics with analytics and decision engines
- Adds an element of judgement

5 Artificial Intelligence (AI)

- Combination of robotics with analytics and artificial intelligence
- Cognitive robot using Machine Learning or statistical modelling to continuously optimise action

1

ROBOTIC PROCESS AUTOMATION (RPA)

“Robotic Process Automation” or “RPA” means the application of technology that enables computer software to partially or fully automate human activities that are manual, repetitive and rules based. RPA gives a business the ability to map out a business process that is definable, repeatable and rules based, and assign a software “robot” to manage the execution of that process. RPA software operates at the “presentation layer” (the user interface) of computer systems and appears to the applications to be a human user.

2

ROBOTIC DESKTOP AUTOMATION

“Robotic Desktop Automation” or “RDA” generally refers to an automation running on the desktop and working with the operator automating fragments of transactions, whereas RPA or robotic process automation reflects a server-based, unattended process execution.

3

INTELLIGENT AUTOMATION

“Intelligent Automation” or “IA” is a holistic description of everything from desktop scripting to artificial intelligence, as applied to process execution, spanning from Robotic Desktop Automation, to Robotic Process Automation, through Cognitive, Machine Learning, Artificial Intelligence, and beyond.

4

DIGITALIZATION

“Digitalization” is the use of digital technologies to change a business model and provide new revenue and value-producing opportunities; it is the process of moving to become a digital enterprise.

5

“FOURTH INDUSTRIAL REVOLUTION”

“Fourth Industrial Revolution” is characterized by emerging technology breakthroughs in a number of fields, including robotics, artificial intelligence, blockchain, nanotechnology, quantum computing, biotechnology, the Internet of Things, 3D printing and autonomous vehicles.

The First Industrial Revolution used water and steam power to mechanize production. The Second used electric power to create mass production. The Third Industrial Revolution, or the “Digital Revolution” involved the advancement of technology from analog electronic and mechanical devices to the digital technology available today. Advancements during the Third Industrial Revolution include the personal computer, the internet and information and communications technology (ICT).

The current Fourth Industrial Revolution is characterized by a fusion of technologies that is blurring the lines between the physical, digital, and biological spheres.

Benefits of Robotic Process Automation



OVERALL COST REDUCTION

- The average cost of implementing and running a robot is much less than the equivalent FTE costs and decreases with large-scale deployments



SPEED & PRODUCTIVITY

- RPA is typically 2X-3X faster than humans
- Even if robots work at same pace as humans they can work round the clock, unlike humans



ACCURACY & COMPLIANCE

- Robots work to 100% accuracy levels and enable compliance
- Avoiding human error saves costs



SCALABILITY & FLEXIBILITY

- Robots can easily be scaled up and down to handle demand fluctuations and seasonal variations



REMOVAL OF NON-VALUE-ADD PROCESSES

- Upskill the workforce to decision-making roles



We are calling this the ***robotic arbitrage*** opportunity. The potentially significant efficiency and quality benefits that can be derived from appropriately implemented RPA is **disrupting delivery capability** and indeed entire industries.

Given the **significant potential benefits** from RPA adoption and implementation, but also the risks of doing this in an uncontrolled approach, we recommend that this be done in a **planned and thoughtful way**, consistent with and aligned with an overall automation and process optimization strategy. **Leveraging and building off existing process and technology platforms and infrastructure** wherever possible.

- Phil Searle, **CIOReview**

Chazey Partners

*recognized by CIOReview magazine as
one of the*

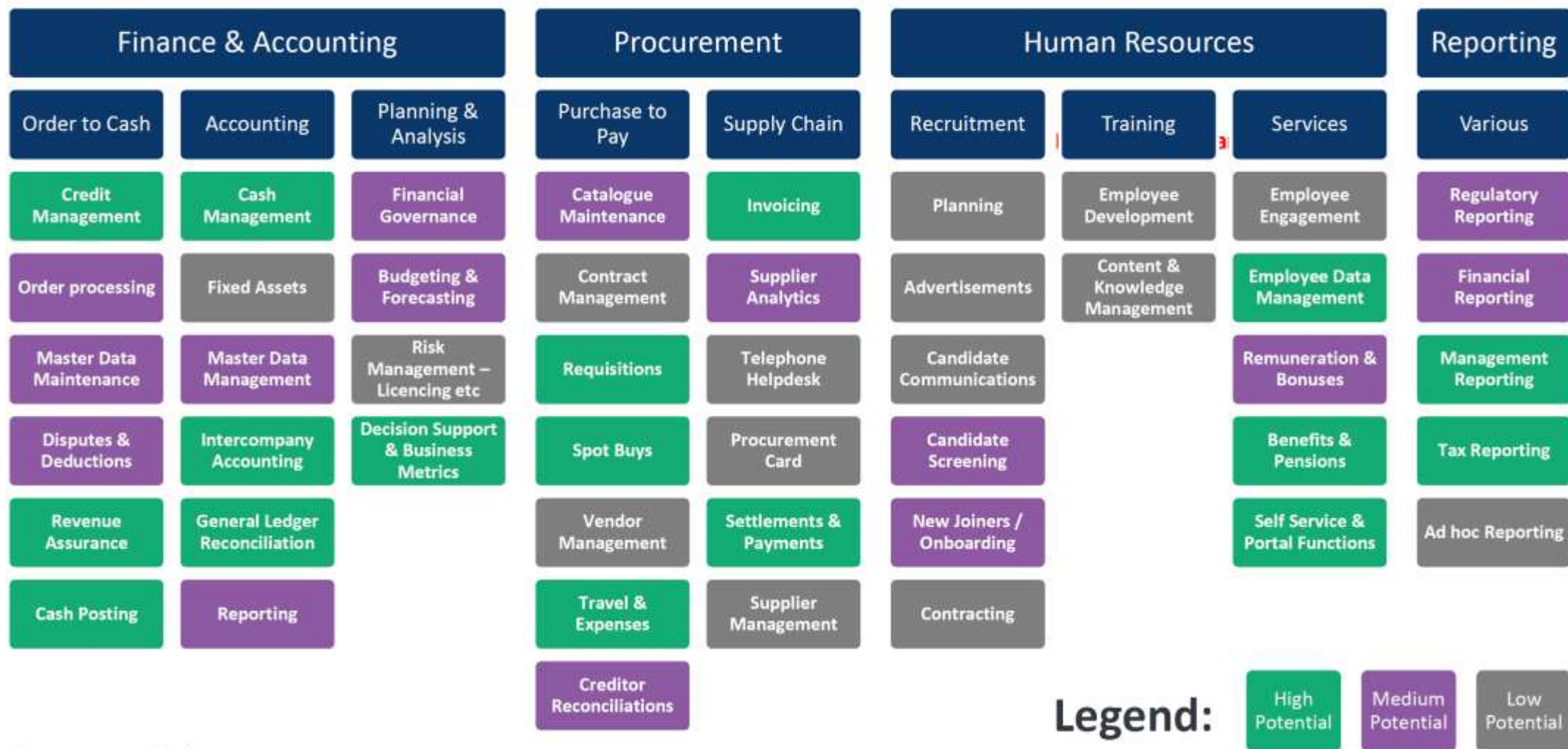
20 MOST PROMISING
ROBOTICS
SOLUTION PROVIDERS - 2018

*An annual listing of 20 companies that are at the forefront of
providing Robotics solutions and impacting the marketplace*

1

Identify and assess opportunities for automation

RPA Potential in Shared Services



Legend:



Case Study

Processing supplier invoices through **SAP** required many manual interventions for reading, validating, registering and posting invoices. Volvo implemented RPA in one of the **accounts payable** (AP) teams, which processes approximately 2,000 supplier invoices every day.

The robot logs into the necessary systems, reads the invoice image, registers the invoice in **SAP**, performs all the necessary validation, including cross-checking against other systems, and decides whether to post, park or block the invoice.

Volvo managed to almost completely eliminate human intervention in the AP process. The **time saved** that was previously spent on manual work is in the range of **65%-75%**.



Enable humans to focus on more decision-oriented activities



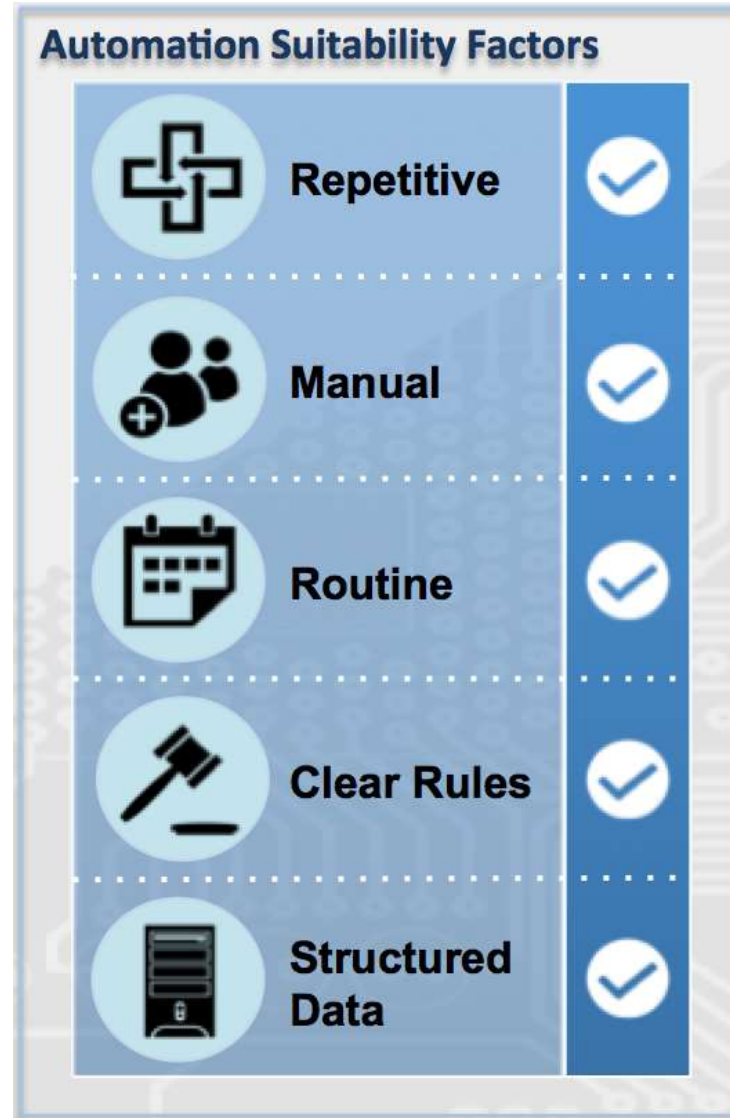
2000 invoices every day



Positive impact on quality, in terms of reduced errors

Process Suitability

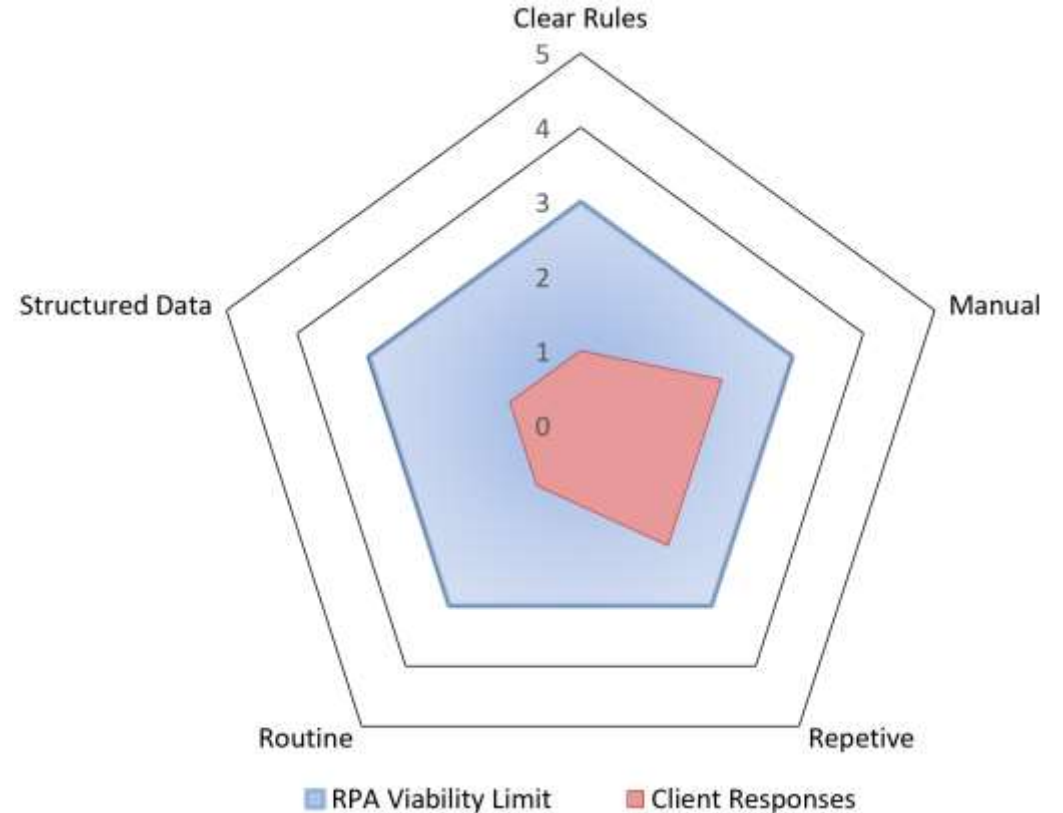
For your initial steps, and for the POC or Pilot at least, select “tasks”, which meet these simple criteria:



POCs & Pilots often fail because company's select big end-to-end processes, which were too complex and unstructured

Example - Process Suitability

- **High-level process overview:** Help desk ticket generated defining a need for an escrow adjustment. Tenant record adjusted as per the instructions in a ticket. High volume of tickets daily that need to be addressed in a timely manner.
- **Automation Factors**
 - Clear Rules: 1
 - Structured Data: 1
 - Manual: 2
 - Routine: 1
 - Repetitive: 2
- **Overall Diagnostic Score:** 1.5
- **FTE Reallocation:** 0.20 FTE



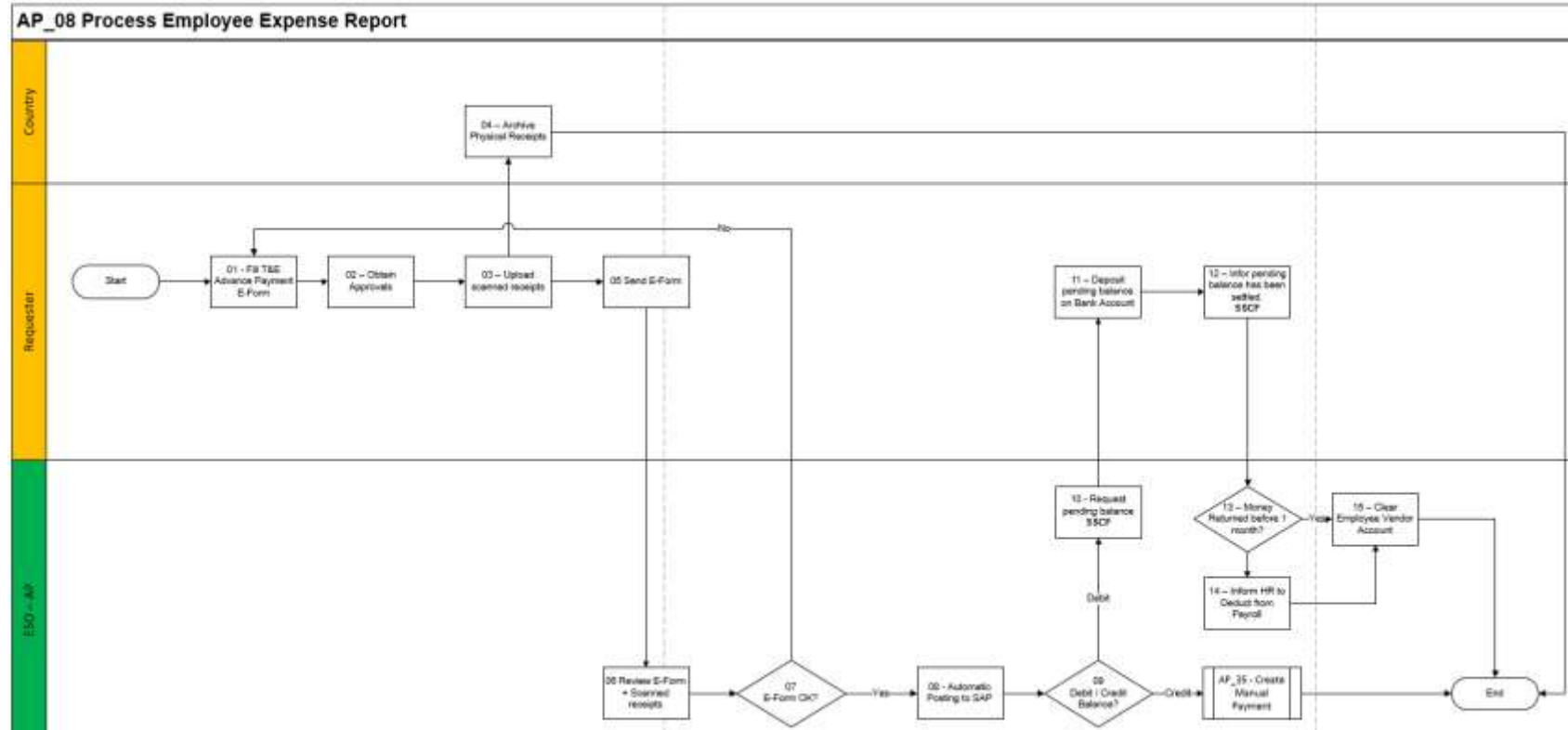
- **Process Improvement Recommendation:** High volume of inputs with information and potential actions that are time-sensitive. Coordinate process execution with daily deliverables or agreements.

High Automation Potential

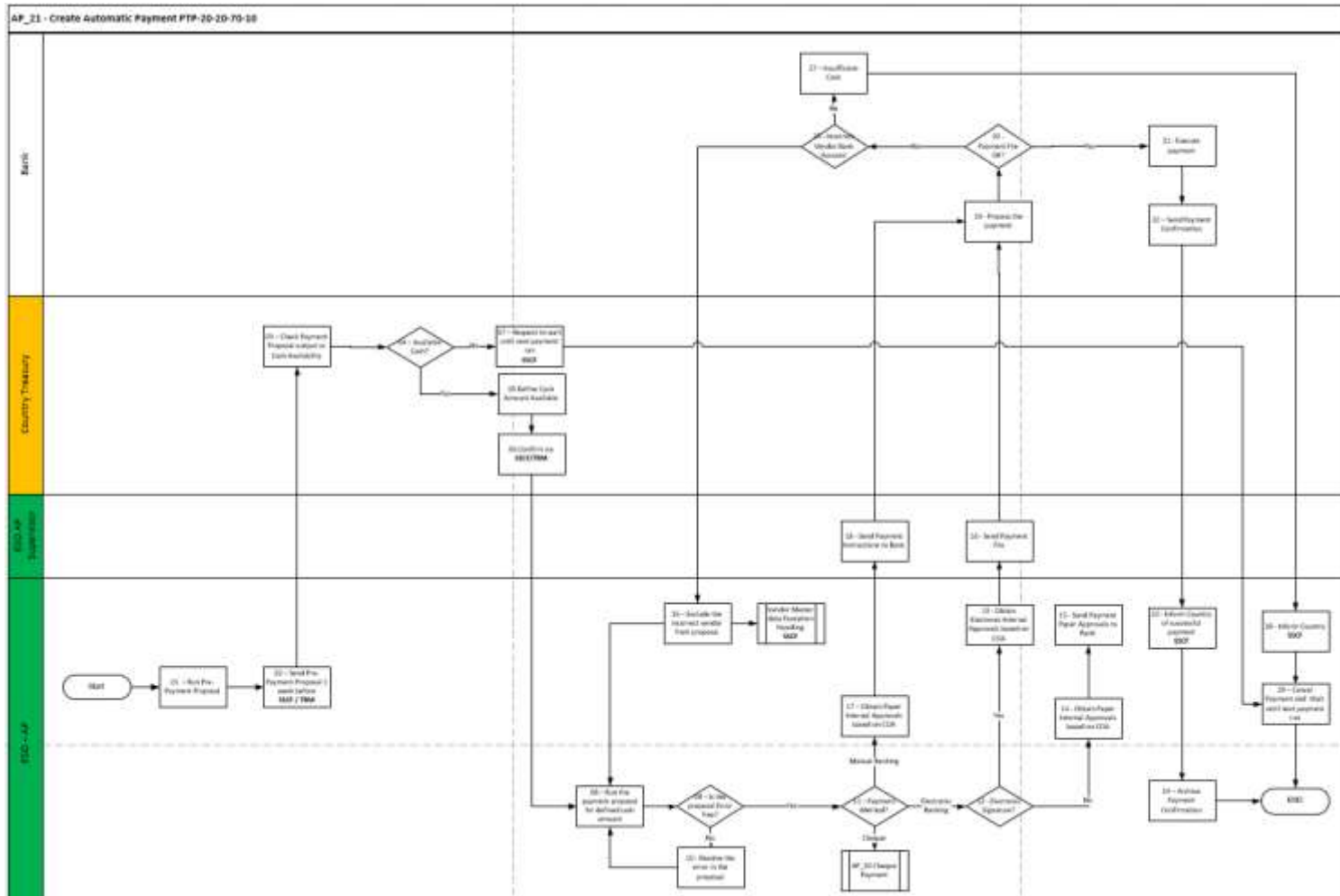
Process Employee Expense Report

Pros:

- Steps 1-5 of the process are completed by the employee and submitted electronically.
- Steps 6 – 15 begin with a standardized input and interface with the ERP.
- Minimal human effort required, for the process to run to completion.
- Human judgement is not needed for decision making.



Medium Automation Potential



Create Automatic Payment

Pros:

- Process steps are repeatable and do not require significant human oversight.
- Process is potentially run multiple times in a week.

Cons:

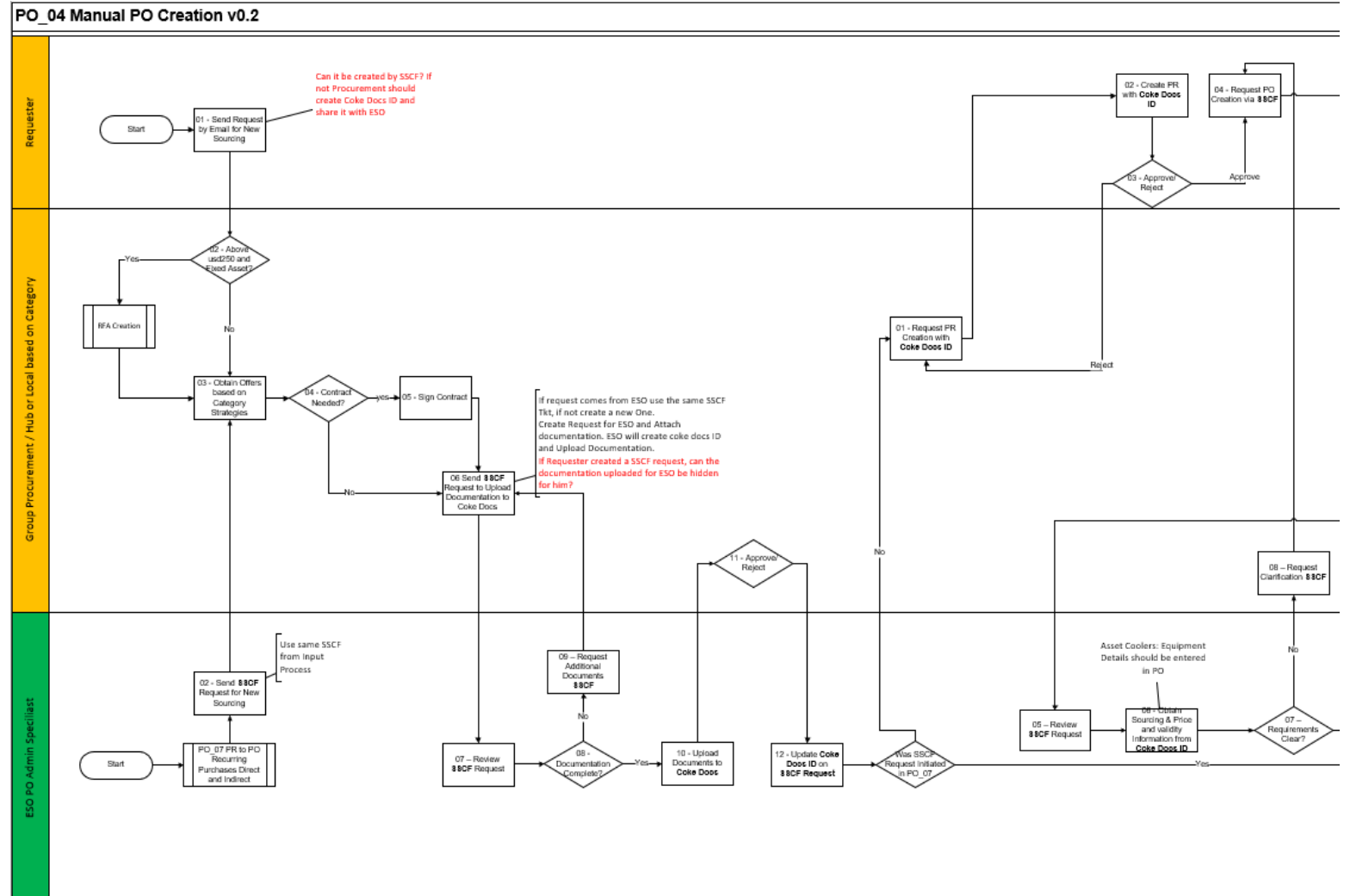
- Process begins with an interface to a country-specific treasury module. Potential for multiple variations of data moving across workstreams.
- Step 14 requires paper approval based on COA.
- Process has the potential to interface with multiple banks. This would require programming and development specific to each institution.

Low Automation Potential

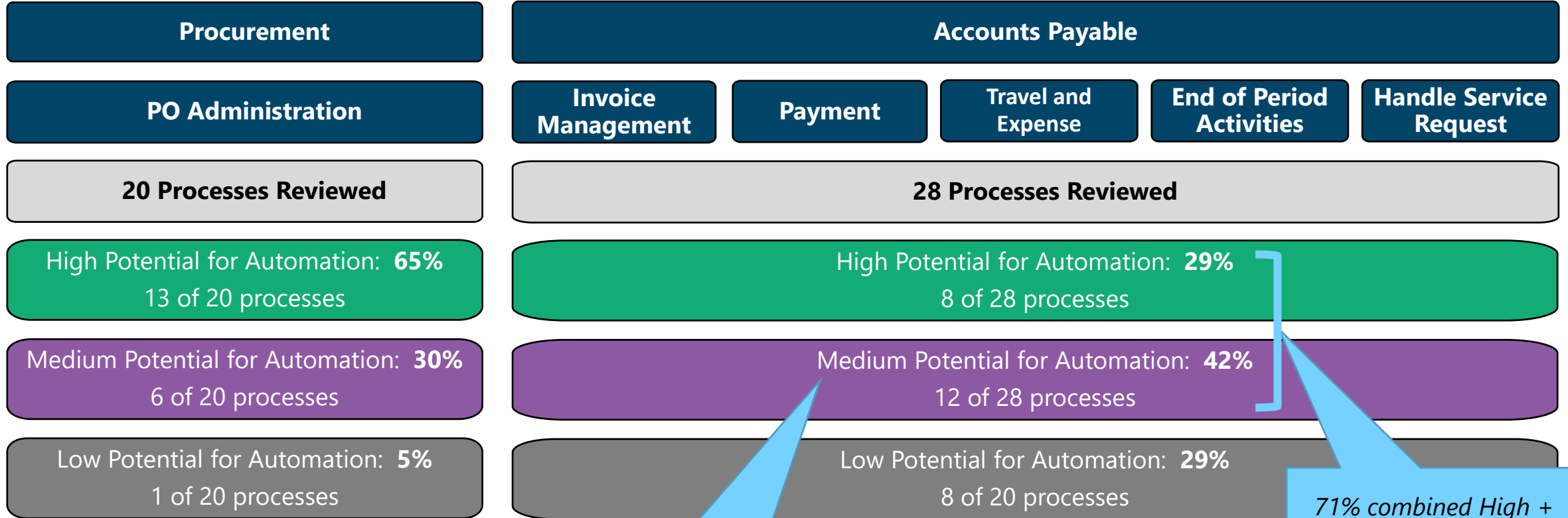
Manual PO Creation

Cons:

- Process can begin with two inputs, country specific or a request from the SSO.
- Process owners may change based on category. Variation of parties involved in the process may require variations in processing steps. Potential for multiple variations of data moving across workstreams.
- There are 11 decision points in the process with multiple sub-processes referenced.



PTP Potential Automation Metrics



Often, processes with a Medium potential for automation have numerous "sub-processes" that can be automated independently.

71% combined High + Medium with potential to increase with process improvements



Legend:



Potential In Scope Processes - PTP

Procurement

PO Administration

New Sourcing Bidding and Awarding Direct	Coke Docs Purchasing Doc. Management
New Sourcing Bidding and Awarding Indirect	Manual PO Creation
PR to PO – Recurring Purchases	Labels Weekly Sourcing
PR to PO - E Store	Blanket PO Creation
PR to PO - Toll Fill	E-Store Catalog Creation
PR to PO - Evreka Annual Purchase	PO Interplant Logistics
PR to PO - Self Service	PO Stock Transfers
PR to PO - Evreka Ad Hoc Request	Frame Agreement Maintenance
PR to PO - Imports	PO Follow Up - New Lead Time
	PO Follow Up - New Quantity
	PO Follow Up - Reporting

Accounts Payable

Invoice Management	Payment	Travel and Expense	End of Period Activities	Handle Service Request
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Receive Scan, Verify Physical Invoices	Create Automatic Payment	Request Travel Advance Payment	Conduct Closing Activities	Handle Service Request
Receive Invoices (Electronic)	Create Manual Payment	Process Employee Expense Report	Accruals	
PO (MM) Invoice Processing	Advance Payment		Reclassification of GRIR Account	
Non-PO (FI) Invoice Processing	Payment Blocking		Reconcile Vendors Manual	
PO (MM) - Post Additional Costs	Payment with Cheque		Reconcile Vendors Automatic	
PO (MM) - Import Invoice Processing			Report and Analyse Invoices and Payments	
Processing Invoice Exception - Price Diff			Post Stamp Tax	
Processing Invoice Exception – Qty Diff			Perform Accounts Clearing	
Processing Invoice Exception - GR Missing				
Automatic Invoice Rejection				
Manual Invoice Rejection				
Post Back Invoices to Supplier/Employees				



Legend:

High Potential	Medium Potential	Low Potential
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Identify and assess opportunities for automation

Exercise:

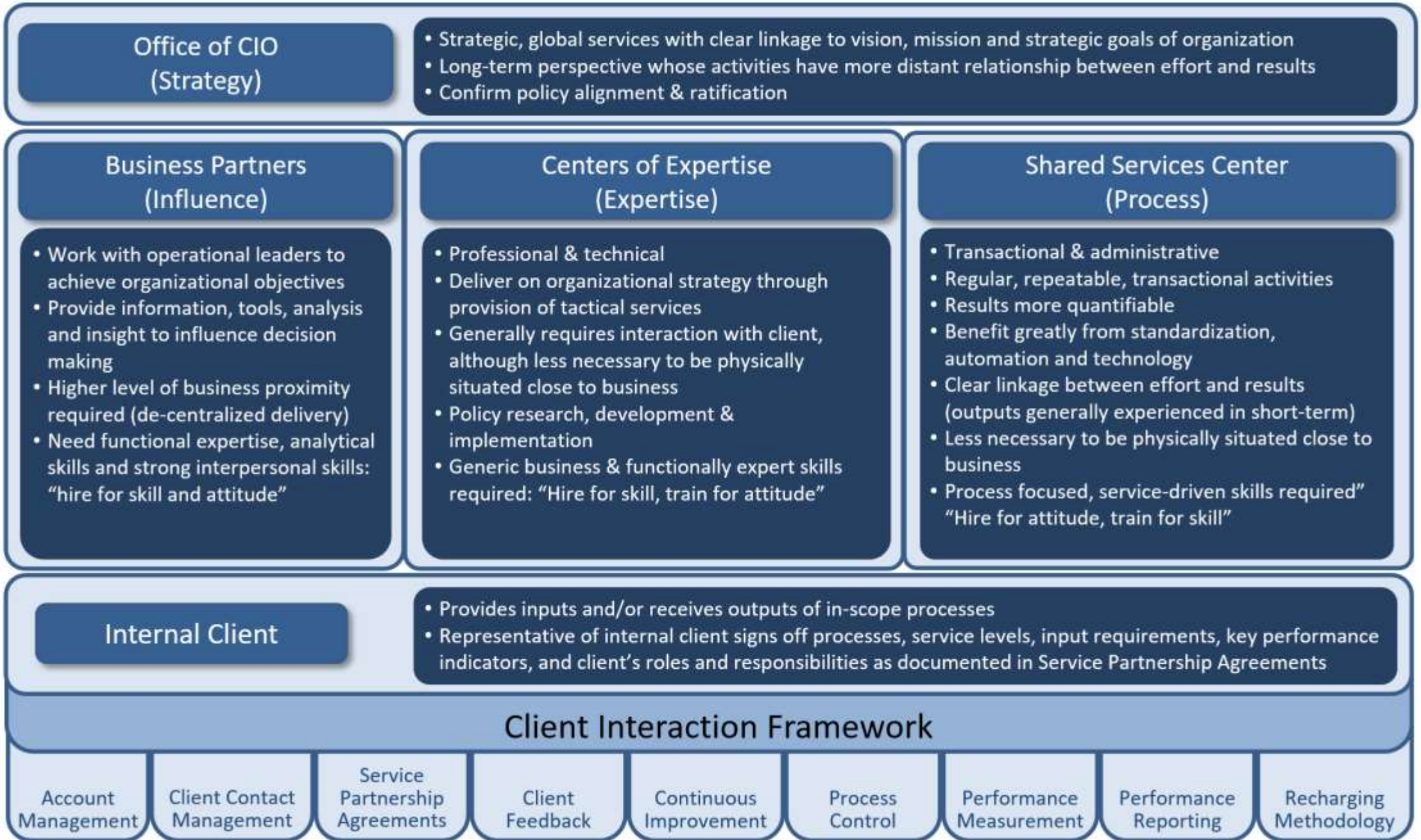
- **In your organization, have you begun to identify areas for Robotic Process Automation and if yes, in what area?**

2

Develop the operating model and governance structure

Educate, educate, educate

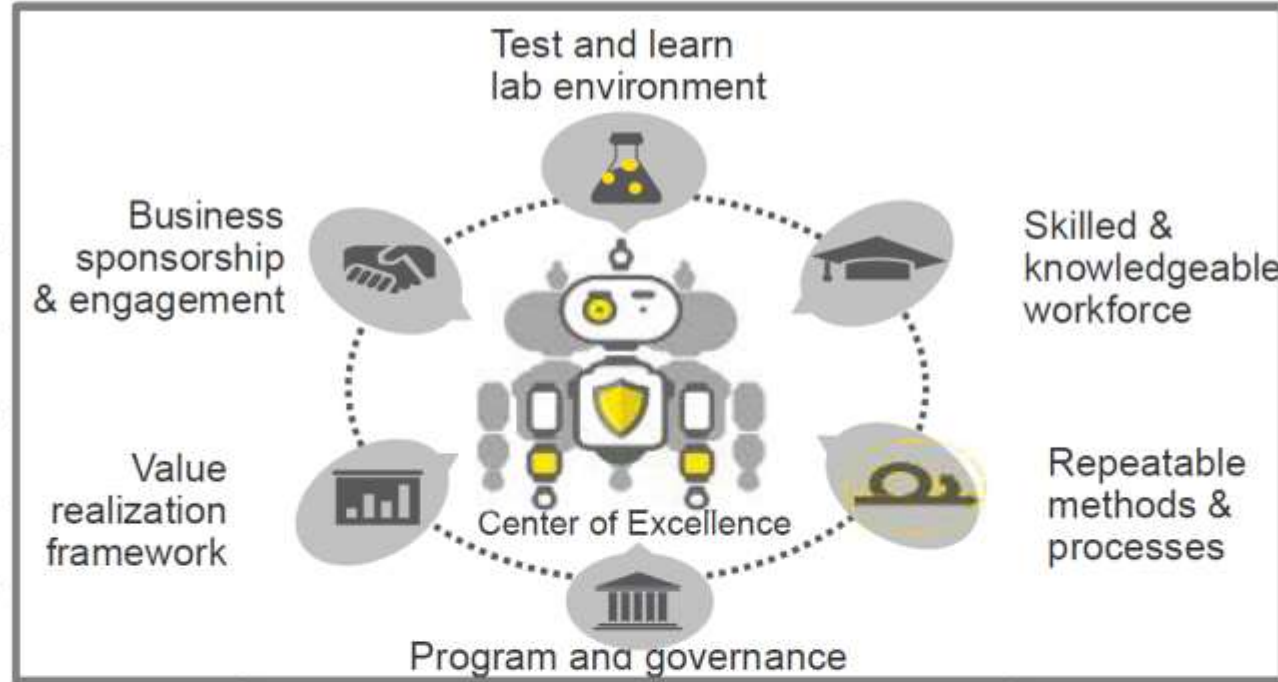
Operating Model



Center of Excellence (CoE) landscape

IT roles

- Application hosting
- Interfacing system governance
- IT system support
- IT security
- Scalability
- Auditability of the processes



Business roles

- Business vision
- Organization design
- Governance model and maintenance
- Delivery methodology
- Service model and agreements
- Engagement model with virtual workforce

Scalability

The CoE is guided by the organization's RPA vision and supported by policies and best practices that enable economies and growth across the enterprise.



Speed

The CoE allows the organization to quickly identify, prioritize and implement RPA solutions across the enterprise.



Consistency

The CoE develops enterprise standards for RPA implementation and support and shares these across the organization ensuring that RPA is implemented consistently within business units.



Center of Excellence functions facilitate benefits across business units

Solution Development

Stakeholder Enablement

Skills Development

Project Delivery Enablement

Vendor Relationship Management



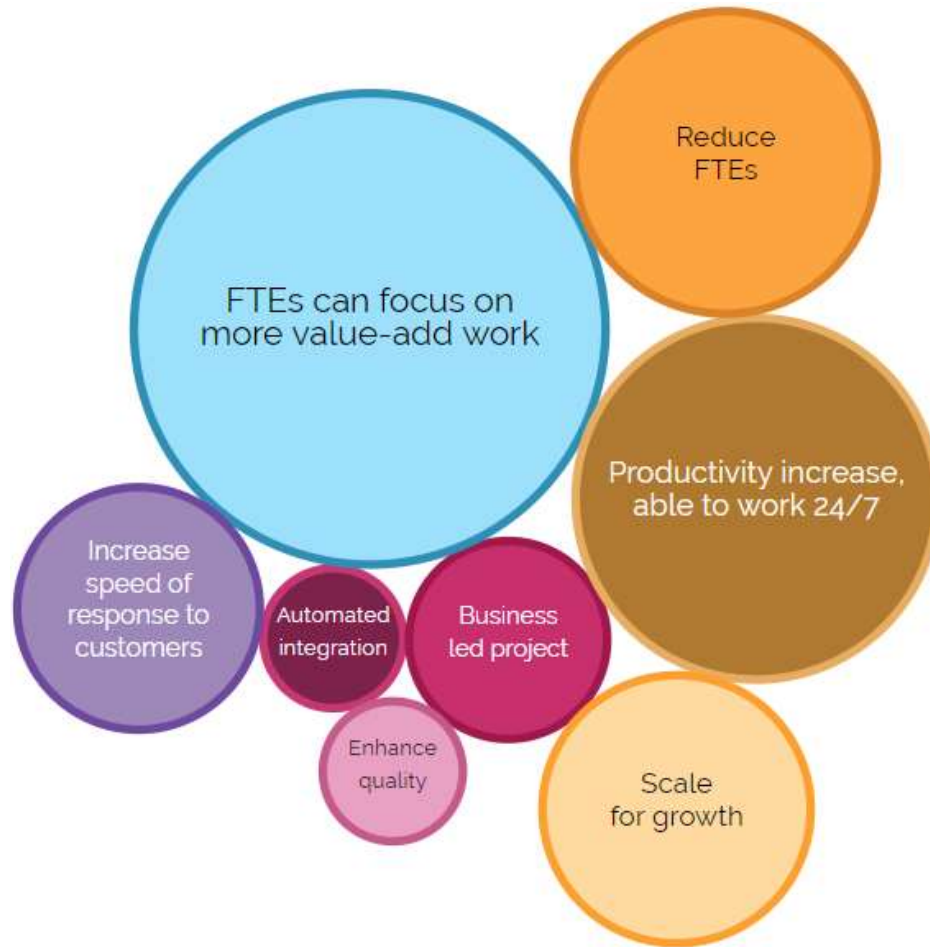
Key Elements of an RPA Center of Excellence (CoE) Governance

Strategy & Governance	Process Life Cycle	Value Measurement	Alignment & Change	Technology	Enterprise Integration
<ul style="list-style-type: none">Program strategyPolicies and standardsRoles, responsibilities and structureRisk managementMethodology and design authorityRobotics asset management	<ul style="list-style-type: none">Process identificationProcess prioritizationAutomated process optimizationDevelopment and deploymentOngoing operations	<ul style="list-style-type: none">Program progress measurementOperational and performance metricsBenefits measurement and reporting	<ul style="list-style-type: none">Skills developmentStakeholder managementOrganization change mgmt.Communication	<ul style="list-style-type: none">Vendor managementArchitecture and infrastructureInnovation and test labExpert networkKnowledge management	<ul style="list-style-type: none">Business process mgmt.Transformation programsRisk and controlsSecurityIT processes

Benefits

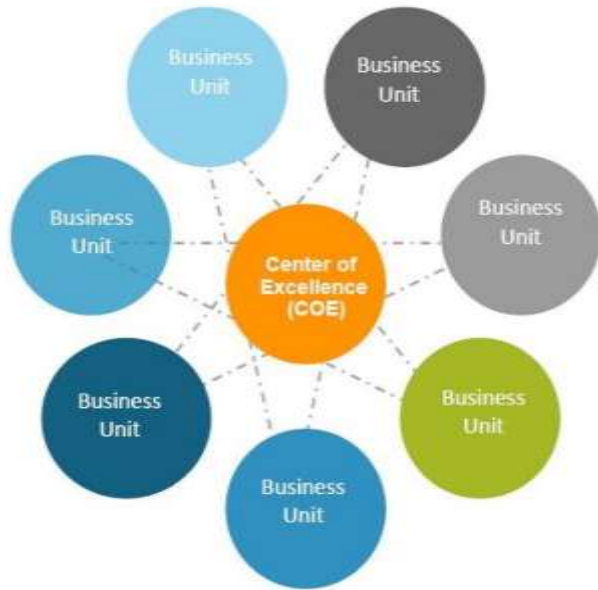
Key CoE Role: Continue to Educate

What are the benefits of intelligent automation (IA)?

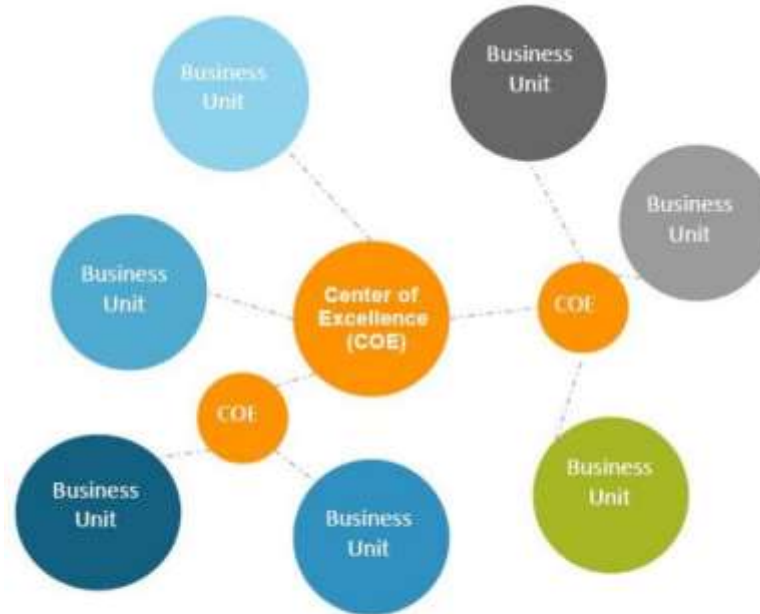


Models

Center \neq Centralized



Centralized

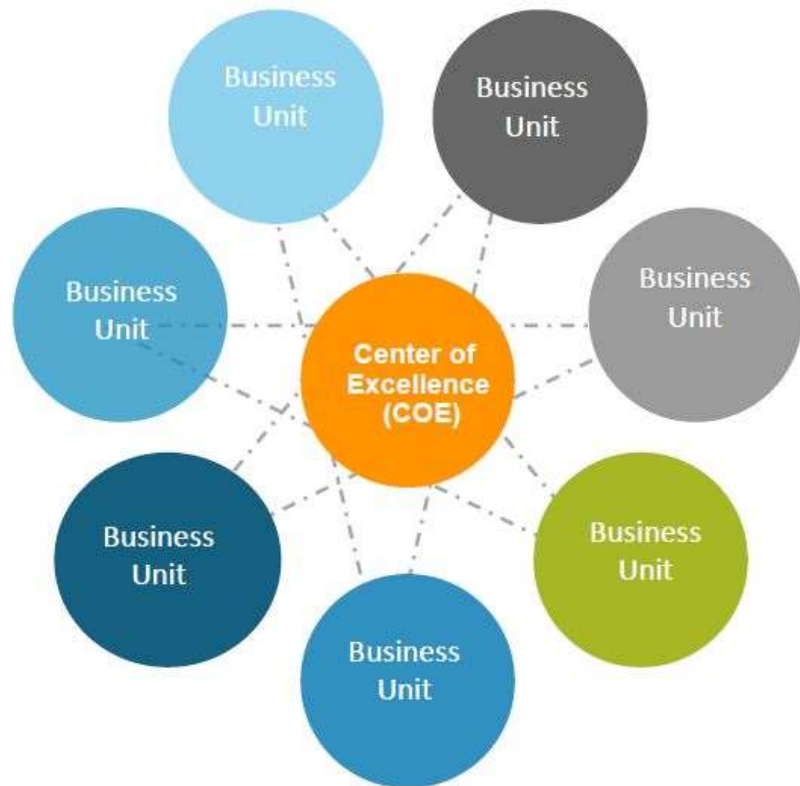


Hybrid



Federated

Centralized



One RPA CoE serving all Business Units

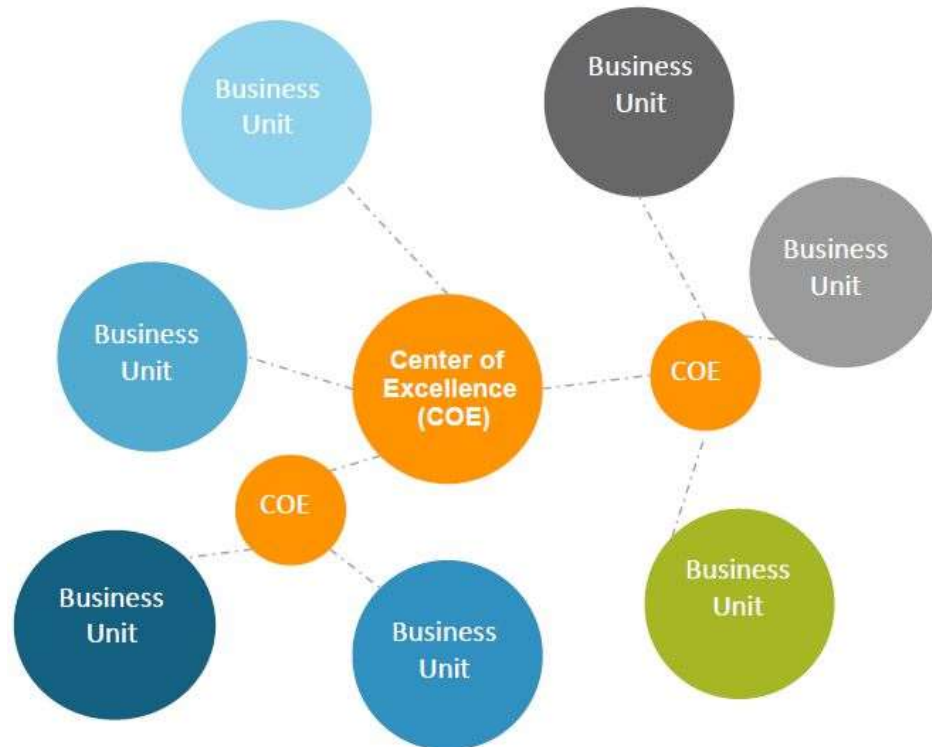
Advantages:

- Unified and centralized RPA support for all Business Units
- Higher expertise, lessons learnt and best practice for automation easier to disseminate within the center
- Standardized RPA deployment, support and implementation methodology

Disadvantages:

- Potential prioritization challenges of automation projects due to high number of business units served
- Relies on distant communication

Hybrid



Several RPA CoEs serving several business units, linked to several smaller RPA CoE dedicated to individual business units

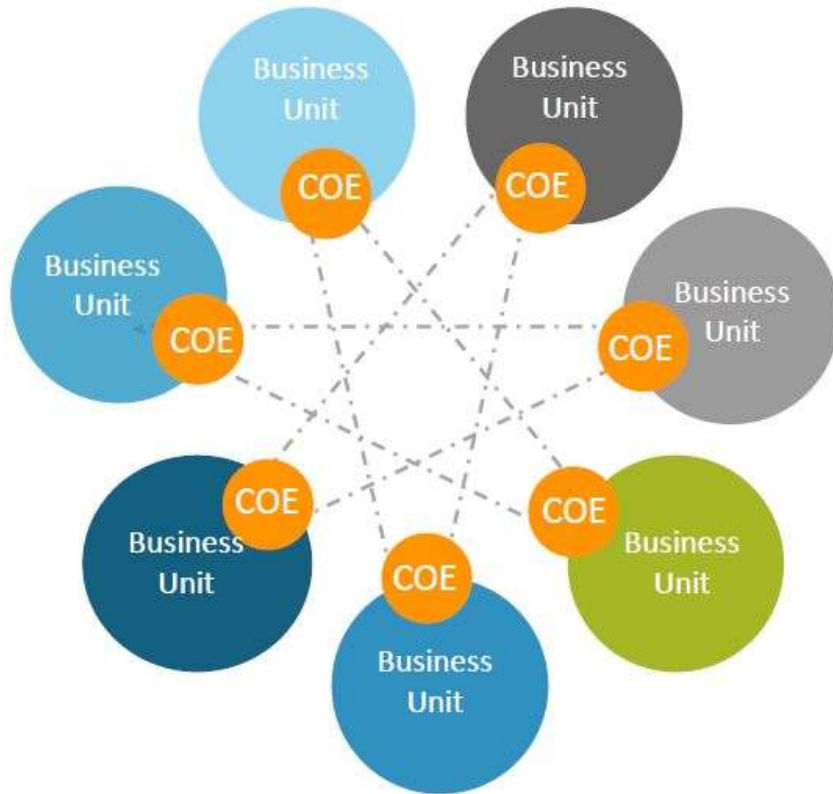
Advantages:

- High complexity projects delivered out of main RPA CoE, smaller RPA CoEs handle low-medium complexity automation projects
- Decreased risk of prioritization challenges due to existence of smaller dedicated RPA CoEs
- Higher process knowledge specific to business units concentrated in the smaller RPA CoEs

Disadvantages:

- Lessons learnt and best practice for automation at risk (expect discrepancy in know how between main RPA CoE and smaller RPA CoEs)
- Potential incoherence in the approach for RPA deployment, support and implementation methodology

Federated



Independent RPA CoEs within each business unit

Advantages:

- Each business unit is fully in control of the automation projects and their prioritization
- All RPA CoEs will benefit from strong process knowledge as close to (within) each business unit.

Disadvantages:

- Lessons learnt and best practice for automation at high risk – need to enforce a strong, regular exchange of best practices between RPA CoEs from different business units.
- High risk of incoherence in the approach for RPA deployment, support and implementation methodology
- Incoherent technical solutions may be applied – risk of always “reinventing the wheel”
- Certain RPA roles will be duplicated and not fully utilized: e.g. the RPA Support team in certain RPA CoEs may have less work than others, same for RPA Solution Architects, etc.



Develop the operating model
and governance structure

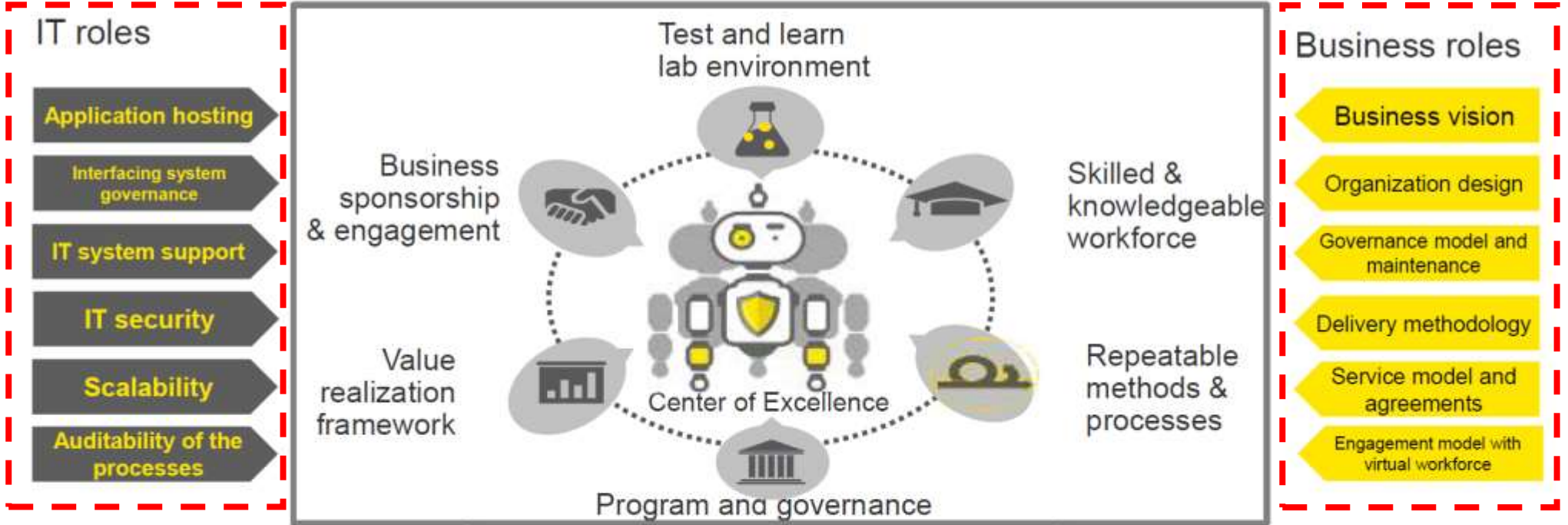
Exercise:

- **In your organization, which CoE model makes the most sense, and why?**

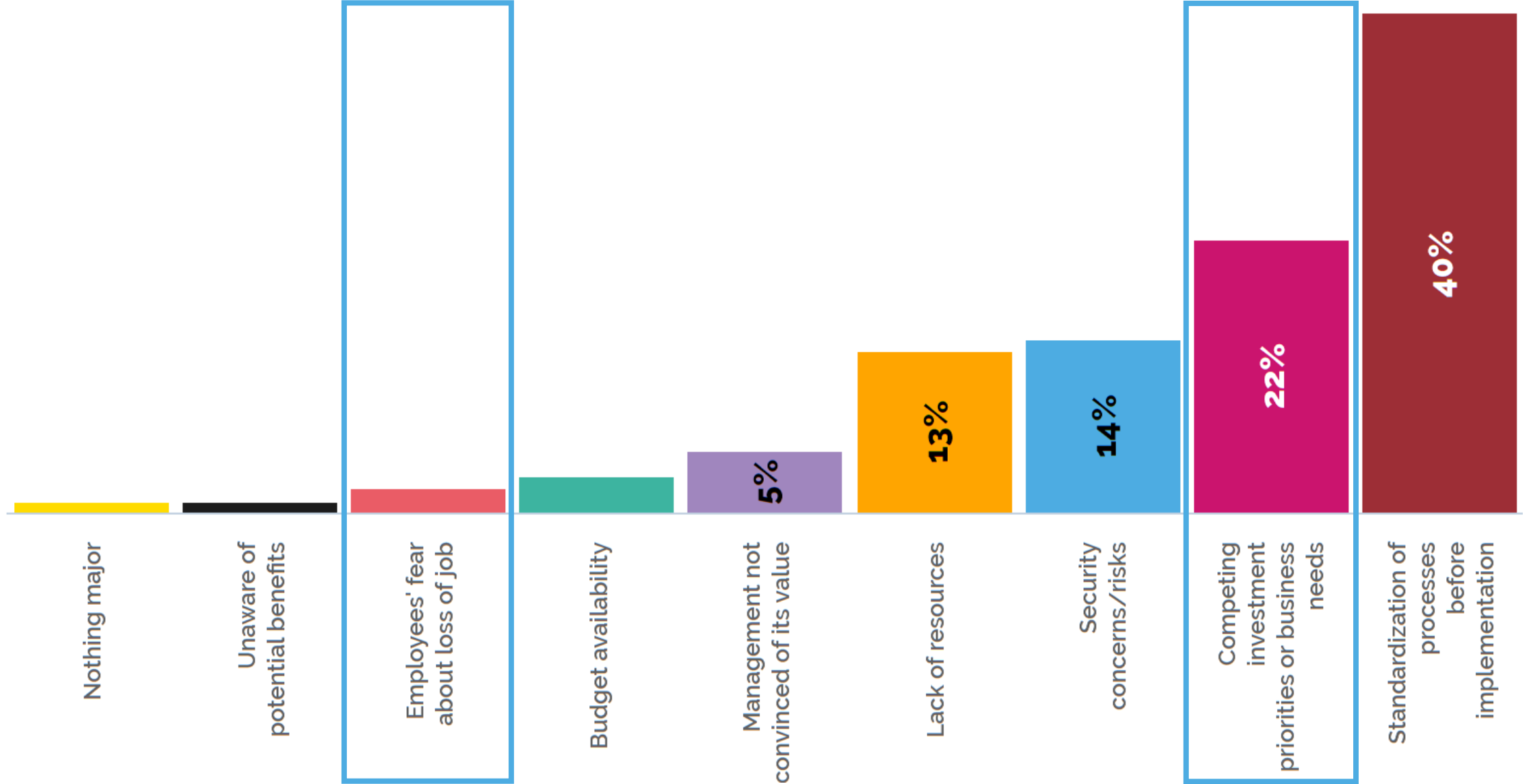
3

**Collaborate with appropriate partners
including business units and IT**

Center of Excellence (CoE) landscape



Main Challenges Implementing RPA



Common Causes of RPA Failures and Mitigation

1. Targeting RPA at the wrong processes

- Highly complex processes are appealing but that is the wrong approach. Even if these are more painful for human employees, their complexity may delay the big cost-savings that result from low hanging fruit.

2. Insufficient skills

- The skills needed to create a proof of concept are not the same skills needed to establish production automations. Driving scalable and resilient automated processes is significantly more complex than building a simple process fix. Investing in classroom training is key.

3. Treating robotic automation as an IT-led rather than business-led project

- Robotic automation is about leveraging a virtual workforce. And just as IT would not manage your human workforce, it should not manage a virtual one, at least not alone. The business needs to own and lead this implementation with a clear view of desired objectives. IT has a crucial role, however, in delivering infrastructure and software support, as well as governance and managing change.

4. Lack of an RPA business case and failure to plan ahead of time

- Proof of concepts or pilots prove that robotics delivers, but don't necessarily prove a successful large-scale implementation. A smart approach is to manage scale and start with Shared Services based opportunities alongside a proof of concept.

5. Not considering what happens once processes are automated

- Who will run the workforce, and what happens when you go live? A well-planned skills building initiative will help.



Common Causes of RPA Failures and Mitigation

– 6. Automating too much of a process or not optimising for RPA

- The target is not necessarily to eliminate human input but to change existing processes to allow RPA to work as effectively as possible. A good benchmark is to automate 70% of low value activity leaving 30% high-value work to humans.

– 7. Treating robotics as a series of automations as opposed to an end-to-end transformation

- Automation should be a continuous practice, and measuring benefits along the way is key.

– 8. Applying traditional delivery methodologies

- Robotics differs from traditional technologies and rarely changes existing systems, so over-engineered delivery methods are not necessary. Agility and speed are what count.

– 9. Overlooking IT infrastructure

- Most robotics tools operate on virtualized desktops that require scaling and business continuity plans. However, IT does not always have the time to create a production infrastructure.

– 10. RPA alone is not enough

- Automating numerous sub-processes still requires some human intervention. Extending robotics into digital self-service, for example, reaps far greater returns.



Recommendations

- **Engagement, communication** and **support** is essential to mitigate all risks
- Designate business operations as **owners** of RPA
- 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)



Collaborate with appropriate partners including business units and IT

Exercise:

- **How have you involved the business in your RPA program?**
- **How have you involved IT in your RPA program?**

4

Deploy and maintain 'bots'

Implementation Methodology for Robots

1

Process
Analysis &
Process
Definition

2

Development
Phase

3

User Testing

4

Transition to
Production

5

Hypercare
Monitoring

6

Maintenance /
Adjustments

Process Documentation

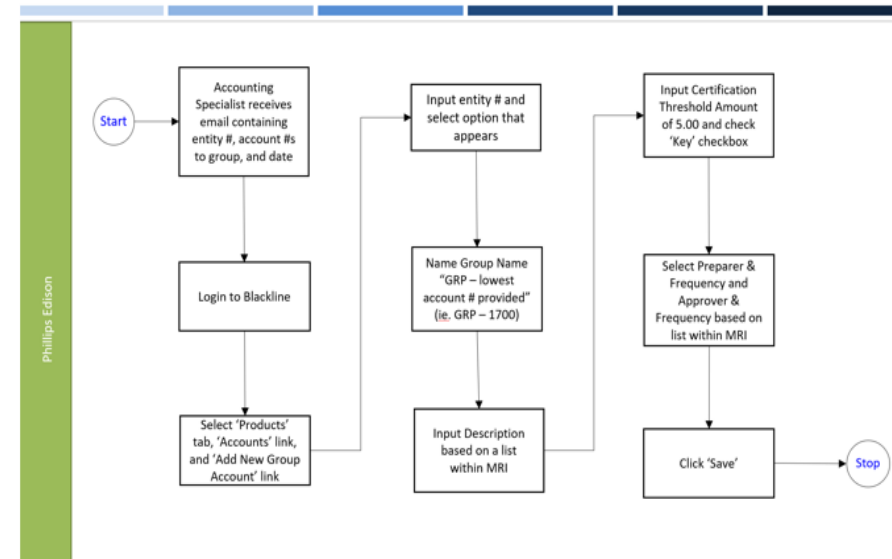
- Documentation process includes a video interview with the process SME to capture process flow step-by-step
- Videos are reviewed by Chazey and developed into a Process Definition Document (PDD)
- All PDD's include documented process flow for the current state and future state of a process
- PDD's are then handed off to the RPA development team to begin the development process

Process Documentation

2.3 As IS Detailed Process map

This chapter depicts the AS IS business process in detail to enable the developer to build the automated process.

Phillips Edison – Blackline Account Grouping



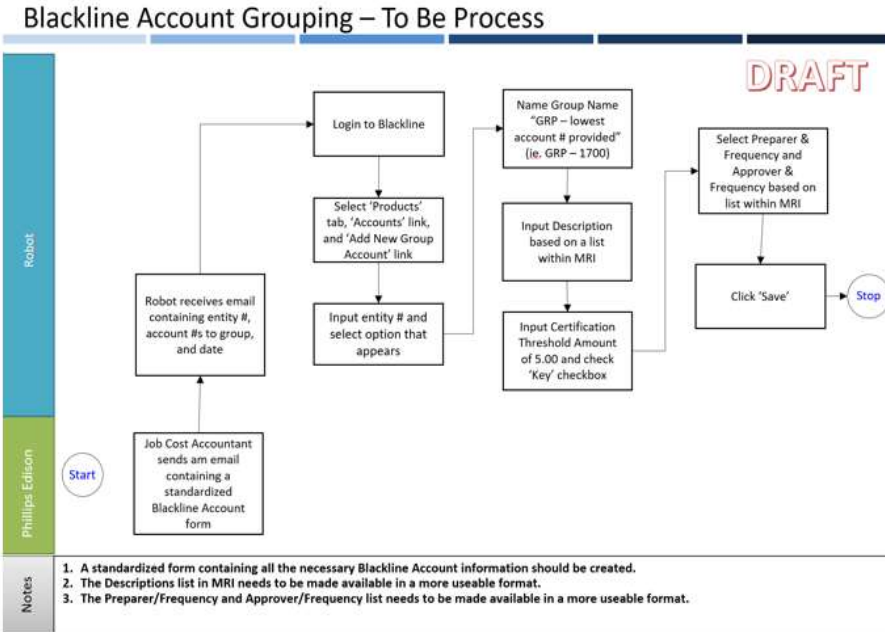
Step	Short Description of Key Process Steps
1	Accounting Specialist receives an email requesting a grouping of Blackline accounts including the entity #, account #s to be grouped, and date (month).
2	Launch and login to Blackline website
3	Select 'Products' tab, 'Accounts' link, and 'Add New Group Account' link
4	Using the information from the body of the email, input entity # and select option that appears.
5	Rename Group Name "GRP - lowest account # provided" (i.e. GRP - 1700)
6	Input Description based on a list within MRI
7	Input Certification Threshold Amount of 5.00 and check 'Key' checkbox
8	Select Preparer & Frequency and Approver & Frequency based on a list within MRI
9	Click Save

- As-Is process documentation includes a level 3 process overview
- Process maps are developed from video interviews with process SMEs

Process Documentation

- To-Be process documentation begins with a level 3 process overview
- Chazey reviews processes and will suggest design changes to accommodate RPA where needed
- First example: Blackline Account Grouping.
 - Process will require a standardized input template with pre-defined fields and values. This input template will be utilized as a request form and the initial point of entry for data into Blackline.
- Process changes identified in the To-Be process design will require a method for communicating and developing needed changes.

3.1 TO BE Detailed Process Map


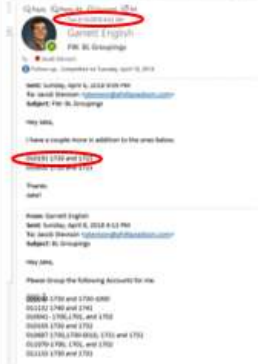
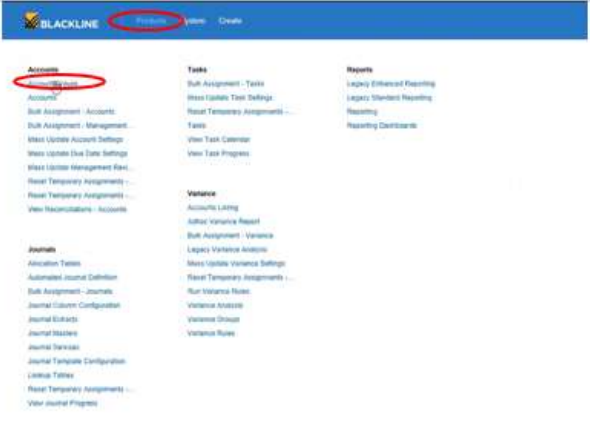
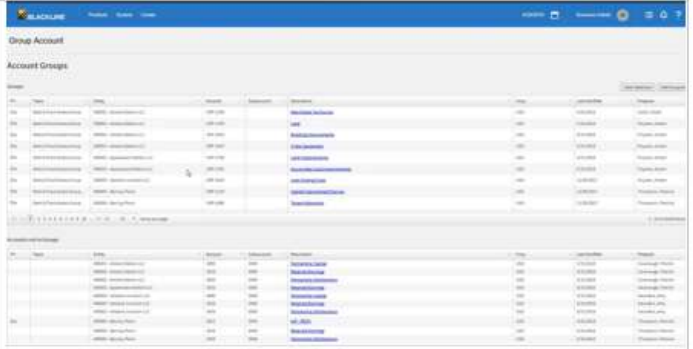


Step	Short Description of Key Process Steps
1	Job Cost Accountant sends an email utilizing a standardized form requesting a grouping of Blackline accounts including the entity #, account #s to be grouped, and date (month).
2	Launch and login to Blackline website
3	Select 'Products' tab, 'Accounts' link, and 'Add New Group Account' link
4	Using the information from the form, input entity # and select option that appears.
5	Rename Group Name "GRP – lowest account # provided" (i.e. GRP – 1700)
6	Input Description of account matching the description in MRI
7	Input Certification Threshold Amount of 5.00 and check 'Key' checkbox
8	Select Preparer & Frequency and Approver & Frequency based on a list within MRI
9	Click Save

Process Documentation

Blackline Account Grouping

Responsibility:		# Tested	
Date:		Team Members:	

	Steps/Procedures (including data values if necessary)	Screen Displays	Expected Results
1	Receives email containing Entity # and Account #s to group. The entity number is listed first, followed by the account #s. The date/month is needed as well.		
2	Navigate to Blackline Products tab. Click Account Groups link.		

Sample Roles, CoE

Building a Robotic Operating Team

3



RPA Sponsor

- Initiates the idea of automation, underwrites resources and protects progress into business adoption



RPA Champion

- Imprints the RPA vision and mission within the organization
- Acts as an internal Evangelist for RPA
- In charge of ensuring a healthy automation pipeline
- Head of the operational management of the virtual workforce



RPA Change Manager

- In charge of creating a change and communication plan which is aligned to the project deliverables, in order to ease the RPA adoption within the company.



RPA Infrastructure Engineer

- In charge of Server installations and troubleshooting



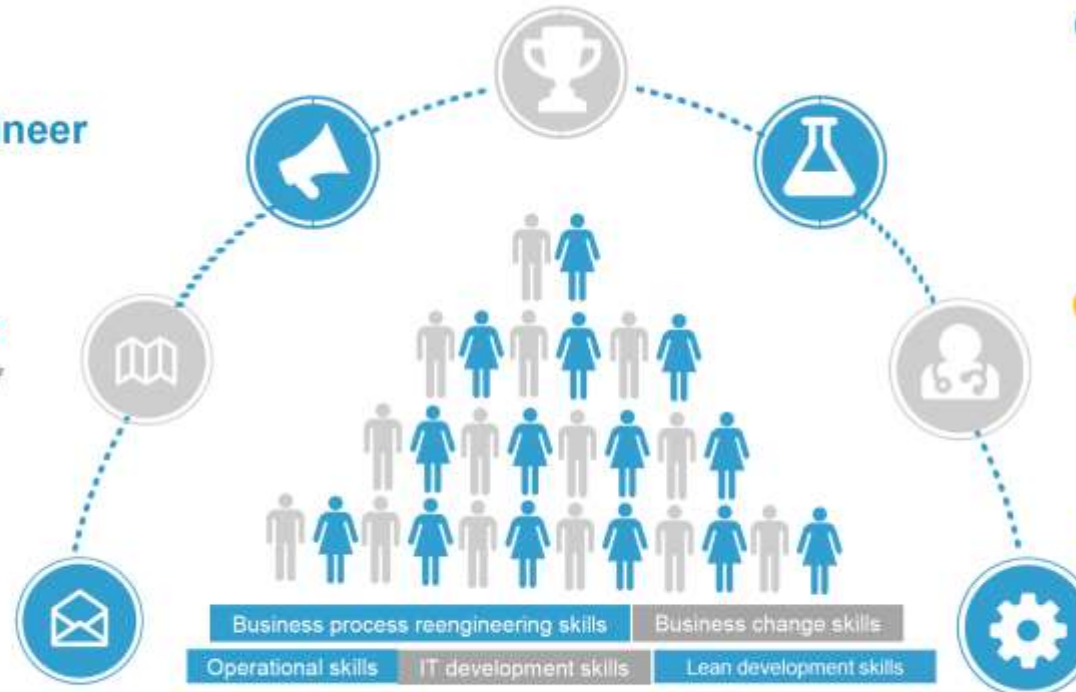
RPA Solution Architect

- In charge of defining the Architecture of the RPA solution. Guardian of the end to end performance of the solution agreed.



RPA Developer

- In charge of designing, developing, testing the automation artifacts



RPA Business Analyst

- Process Subject Matter experts located in Business Operations.
- In charge of creating the process definitions and process maps used for automation



RPA Supervisor

- Administers, orchestrates and controls the virtual workforce in operational environment
- Focused on continuously improving the robots operational performance



RPA Service Support

- First line support for the RPA solution deployed.

The Robotic Operating Team or Centre of RPA Excellence is fundamentally a **cross functional team** with the clear objective of deploying the RPA automation on a global basis as quickly, as efficiently and as safely as possible.



RPA Operations



RPA Transitions Team

Sample Position Description

●●●● RPA Supervisor - Operations ●

Role definition:

Part of future RPA Operations team.

Administers, orchestrates and controls the virtual workforce in operational environment

Focused on continuously improving the robots' operational performance using the tools and technologies in place and improving these.

Uses advanced reporting and analysis functions based on detailed logging system to optimize resource use and stability of robots and artifacts in place.

Deliverables:

Reporting of optimally running artifacts on well-utilized RPA resources

Skill-set requirements

Strong process and technology knowledge.

Medium to advanced experience in supervising teams, monitoring, reporting and auditing.

Medium understanding of RPA software functionality at desktop level.

Strong understanding of monitoring and auditing functions of the RPA software used.

Previous experience working with RPA tools is a plus.

Medium to advanced experience in supervising teams, monitoring, reporting and auditing.

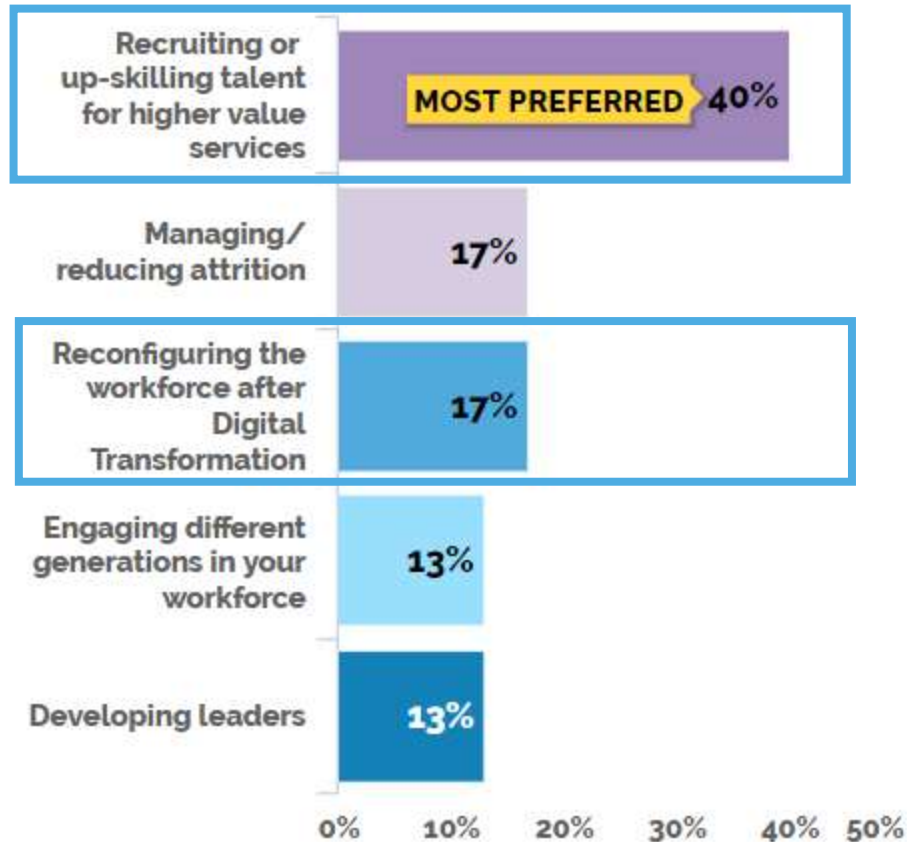
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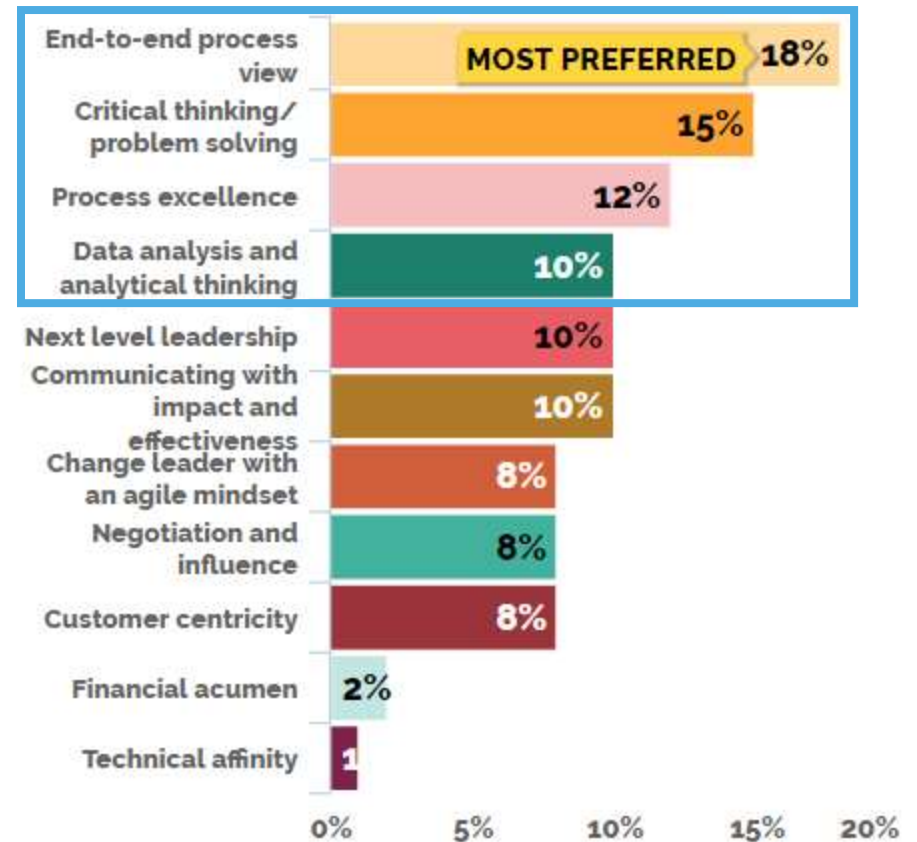


Talent Challenges

Top challenges in managing talent

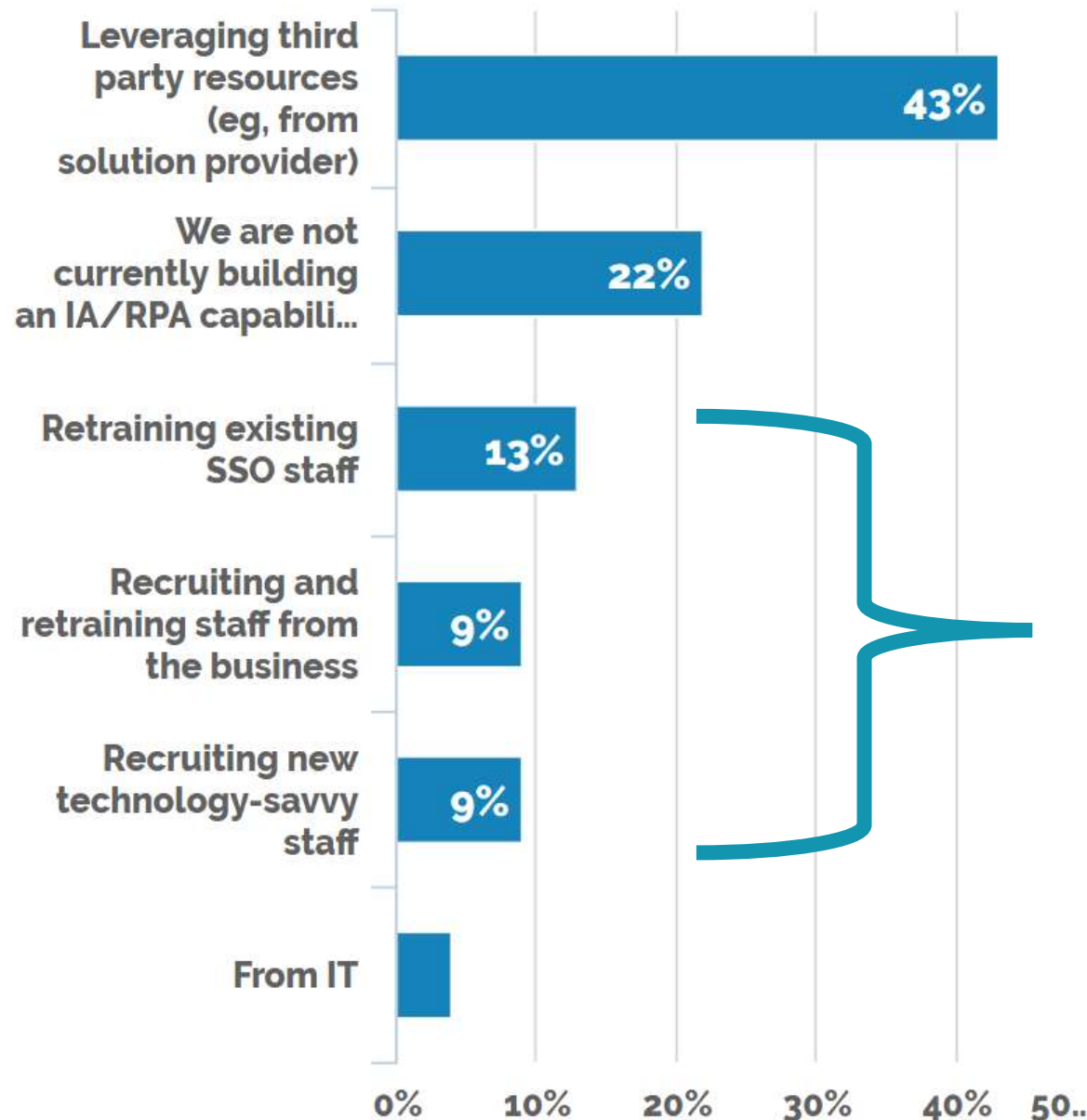


Skills gaps in Latin America Shared Services



If you are building your own Intelligent Automation capability, where are you sourcing the talent?

Sourcing Talent

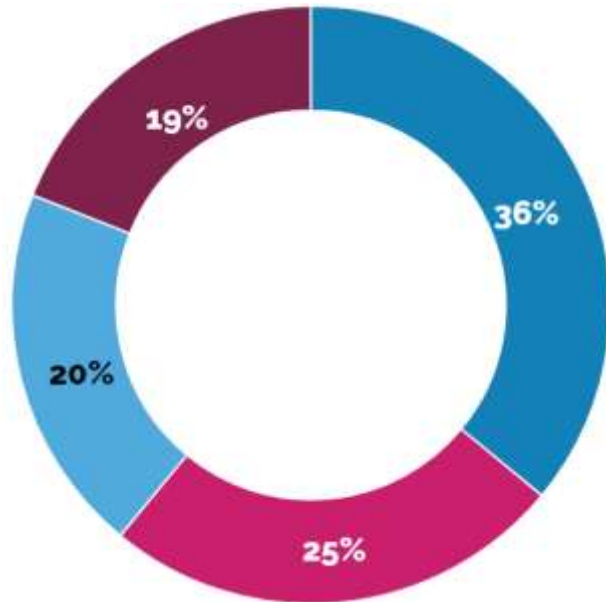


"We look for attitude and aptitude"

Whereas many vendors advertise "no technical knowledge needed", it speeds both training and impact

Digital Natives and Millennials are well suited for these roles

Internal vs. External



- Reliance on third party to deliver solution
- Building internal capabilities by leveraging third party training and skill transfer
- Recruiting team members (internal or externally) to develop the capability
- We are not currently building an IA/ RPA capability



Building Automation Capabilities

	20%	36%	25%
MODEL	IN-HOUSE	OUTSOURCED	HYBRID
CONSIDERATIONS	<ol style="list-style-type: none"> Executive sponsorship Investment capabilities Existing organizational grounding Staffing Strategy Planning Controls & audit 	<ol style="list-style-type: none"> Immediate business pressure that needs to be addressed Sponsorship attainment 	<ol style="list-style-type: none"> Strategy and governance, which drives prioritization and benefits Choice and implementation of technology Management of production automation
PROS	<ol style="list-style-type: none"> Knowledge acquisition 	<ol style="list-style-type: none"> Speed Responsibility 	<ol style="list-style-type: none"> Fewer political repercussions Self-contained Faster implementation
CONS	<ol style="list-style-type: none"> Start-up cost 	<ol style="list-style-type: none"> Wins are not integrated IT Governance Knowledge retention and expansion Resistance Price 	<ol style="list-style-type: none"> Not developing your knowledge Contracting challenges



Deploy and maintain 'bots'

Exercise:

- **Have you begun to staff an RPA CoE and if so, how?**



Help with the
Journey

6 STEPS TO LAUNCH a COMPANY'S RPA JOURNEY

1

Process
Suitability
Assessment

2

Proof of
Concept /
Pilot

3

Operating
Model

4

Vendor
Assessment
& Tool
Selection

5

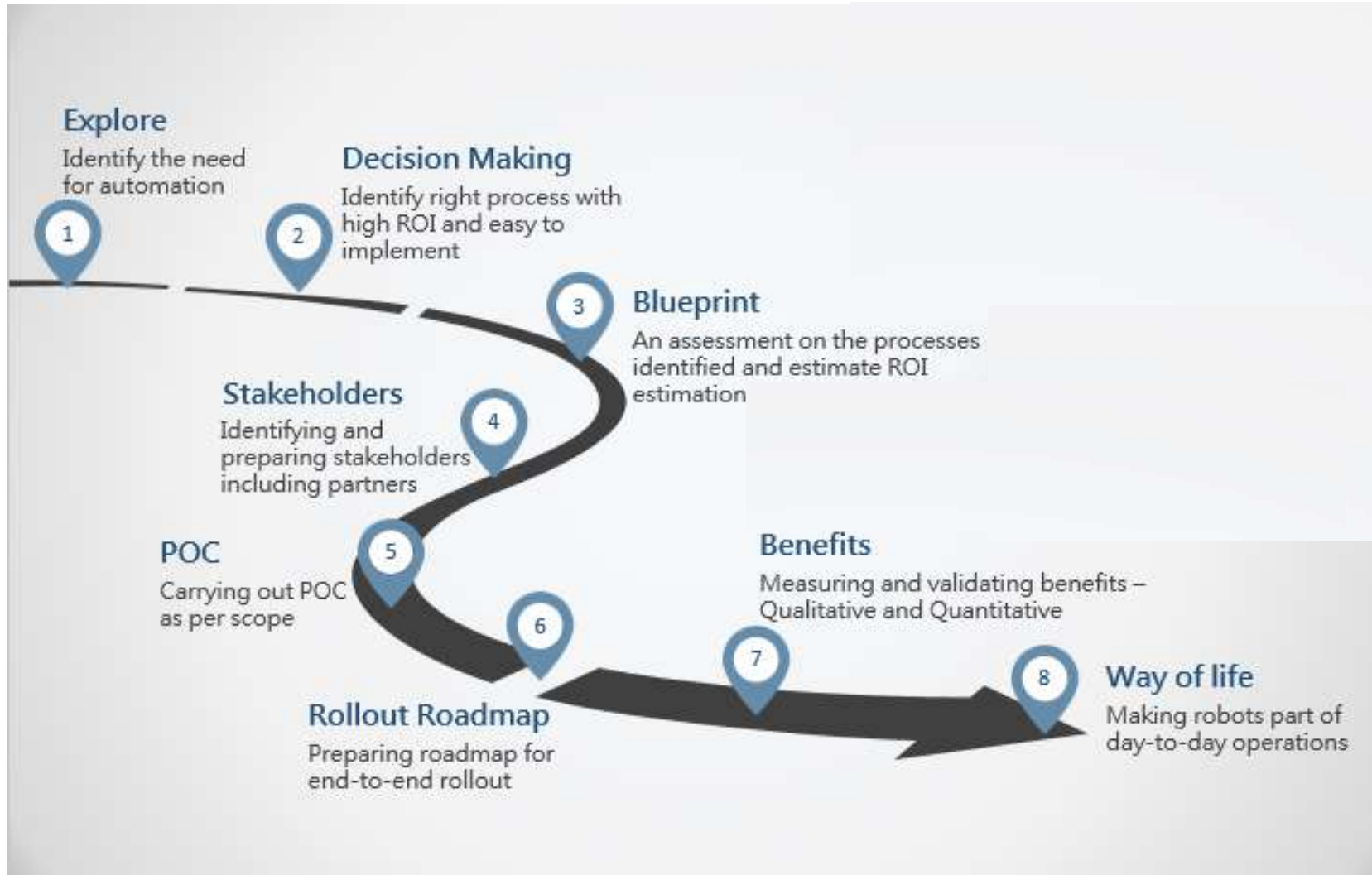
Business
Case

6

Automation
Roadmap

We advise following a clear, simple, structured framework as the building blocks for a successful RPA journey with tangible benefits and well defined expectations

Automation Roadmap





Recent Success

Chazey is currently engaged to help launch and grow the RPA program at Phillips Edison, initially focused on key areas of accounting to include billing, accounts receivables, collections, lease maintenance and monthly accounting entries.

Our work includes process assessments, process improvements, building robots, updating policies and procedures for a hybrid workforce, elaborating the suggested robotics operations model and building a business case for RPA growth.

Also includes knowledge transfer of process, methodology and technical approach for developing additional robots as their program scales to enterprise level.



Questions?

**Leverage Our Experience
for Your Success**

THANK YOU



CONTACT US



Regional Director, Latin America

Esteban Carril

estebancarril@chazeypartners.com

M: +55-119-9654-5140



Global Head, RPA Practice

Craig Ackerman

craigackerman@chazeypartners.com

M: +1 703 401 0419



www.chazeypartners.com



www.linkedin.com/company/chazey-partners



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