Build an RPA Strategy for Your SSO Operations

CHAZEY PARTNERS

12th Latin American SSON SHARED SERVICES & OUTSOURCING WEEK

www.ChazeyPartners.com

Who's Who

Name | Company | Role

Show of hands:

RPA: Exploring, Launching, Growing, Scaling?

How many bots in production?

Have a CoE?

Chazey Partners

INTRODUCTION

Chazey Partners

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**
   Practioners 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

Chazey Partners

Who We Have Worked With

OUR CLIENTS

WHERE WE COME FROM

Chazey Partners

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

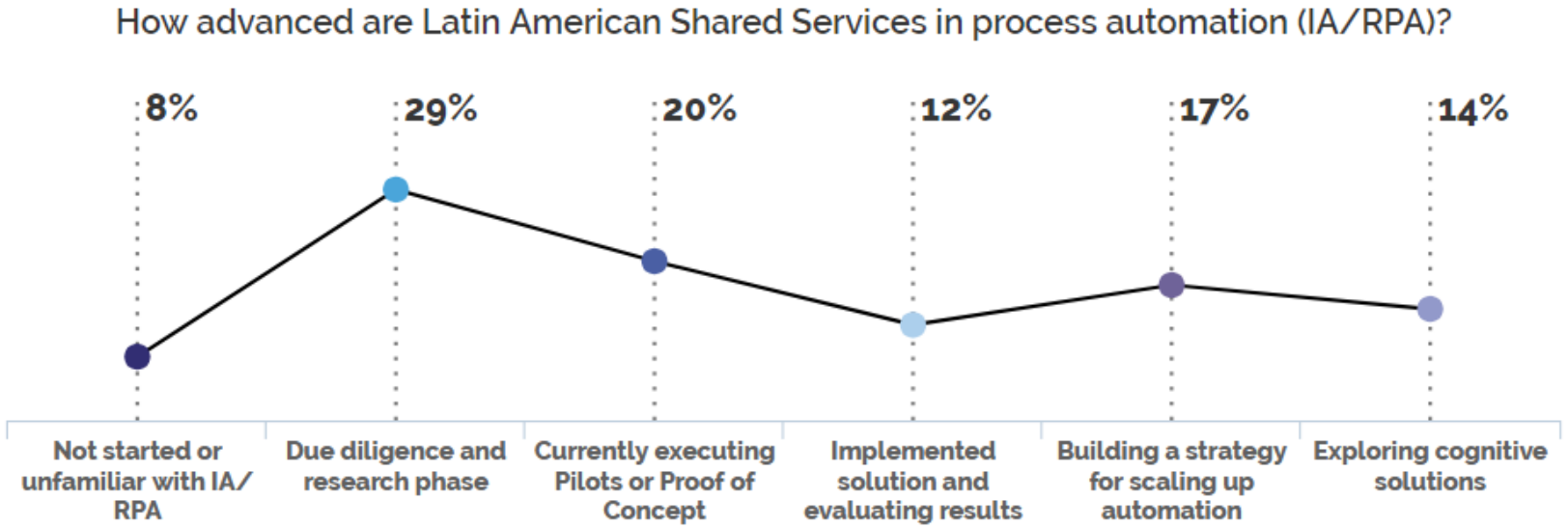
4 Deploy & Maintain Bots

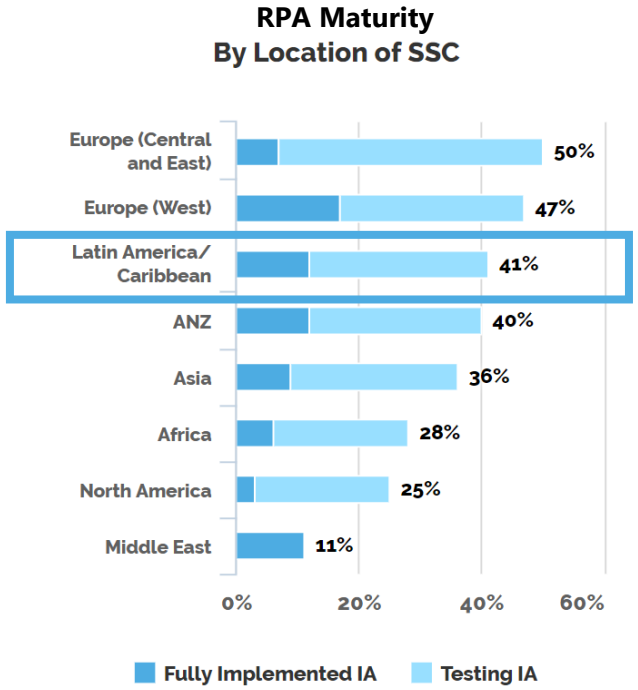
Chazey Partners

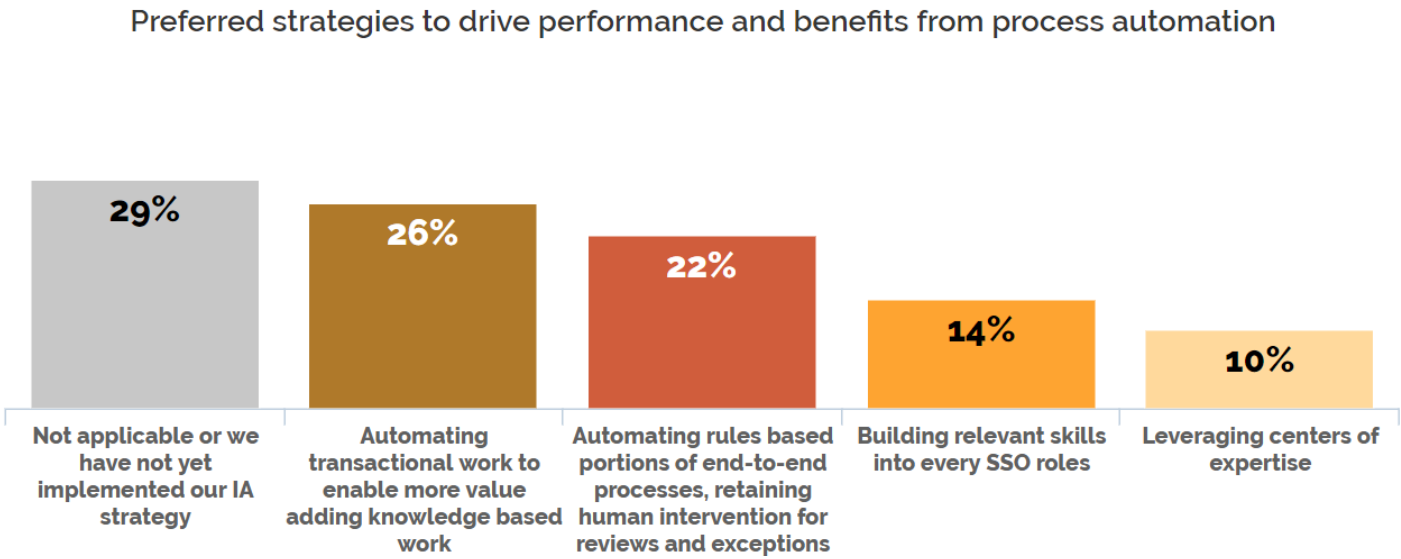
Preface

Definitions and Current State

Current State







Source: SSON Analytics - Talent and Intelligent Automation – Performance Drivers for Latin American Shared Services in 2018

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

Chazey Partners

Source: SSON - Global Intelligent Automation Market Report, H1 2017

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.

Chazey Partners

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.

Chazey Partners

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.

Chazey Partners

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.

Chazey Partners

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.

Chazey Partners

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

Chazey Partners

“

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

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

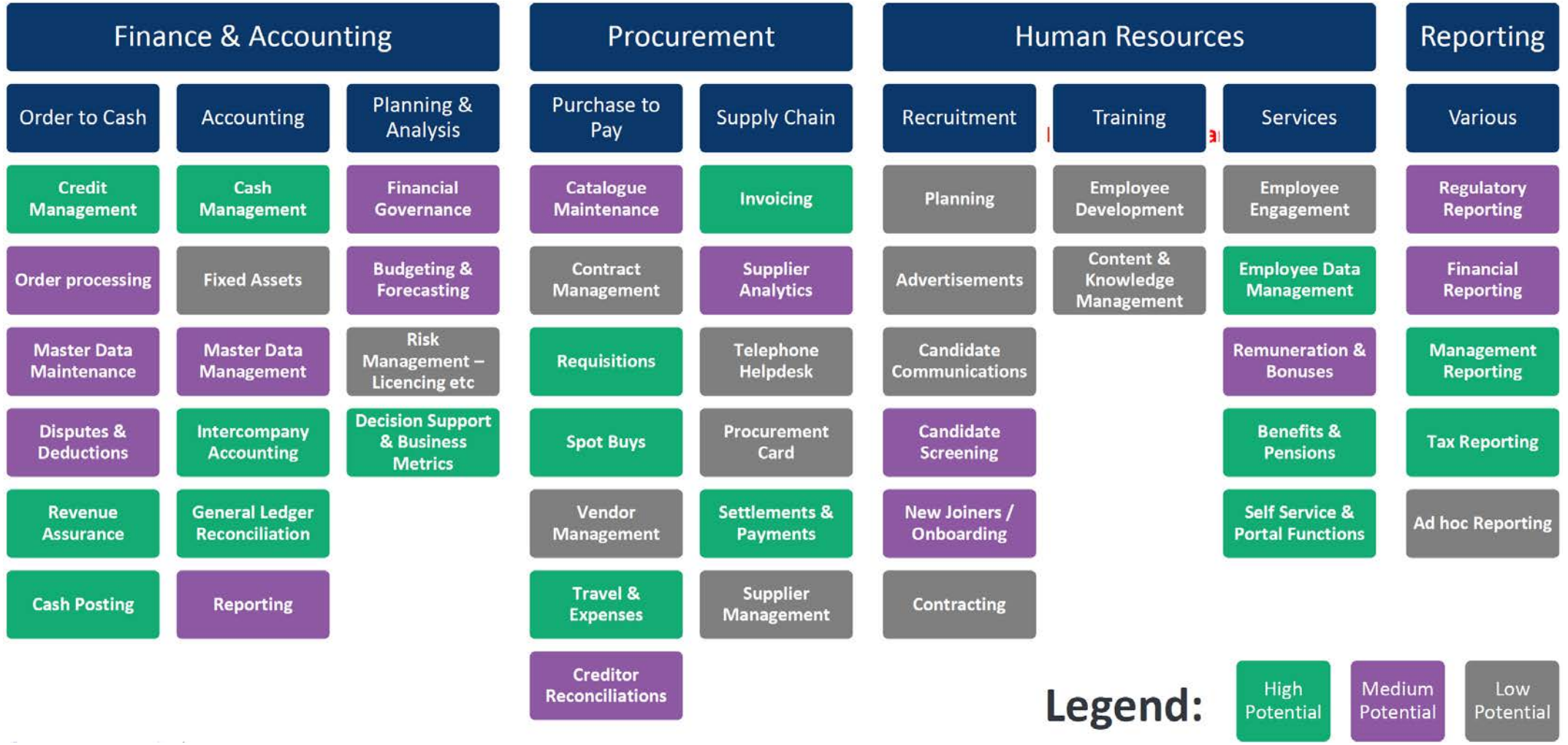
Chazey Partners

1

Identify and assess opportunities for automation

Chazey Partners

RPA Potential in Shared Services



Source: BluePrism

Case Study

Enable humans to focus on more decision-oriented activities

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.

2000 invoices every day

Positive impact on quality, in terms of reduced errors

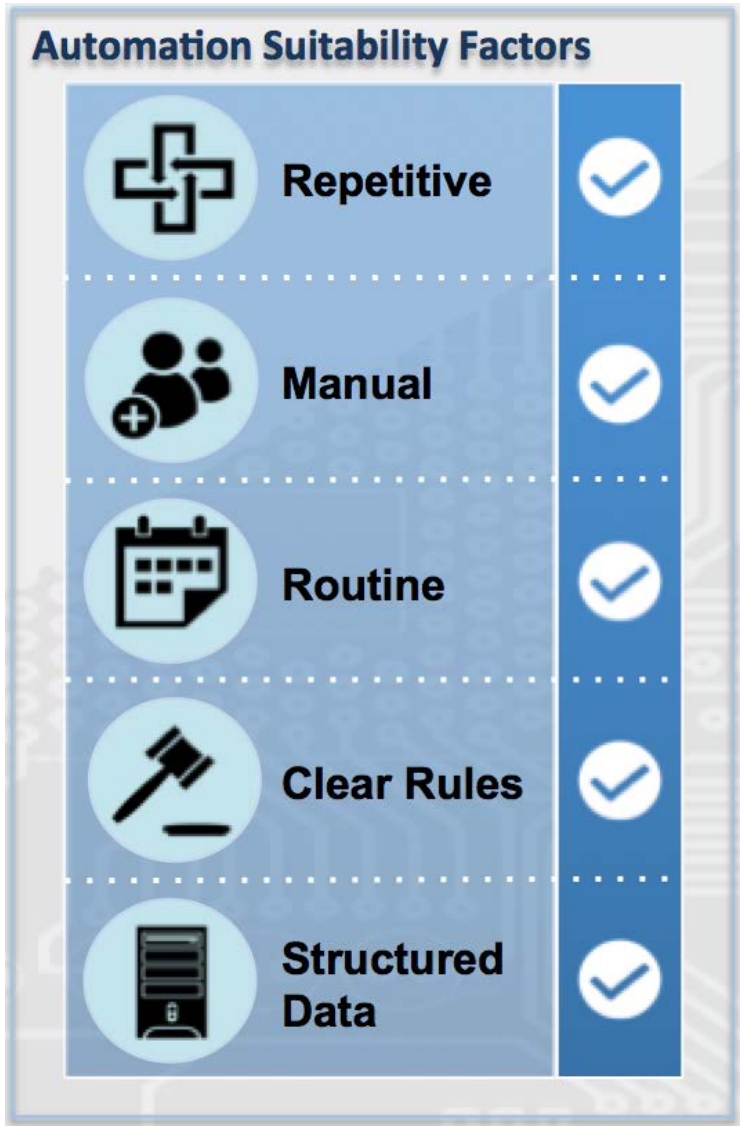
Volvo managed to almost completely eliminate human intervention in the AP process. The **time saved** that was previously spent on manual work is in the range of **65%-75%.**

Chazey Partners

UiPath Robotic Process Automation

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

Chazey Partners

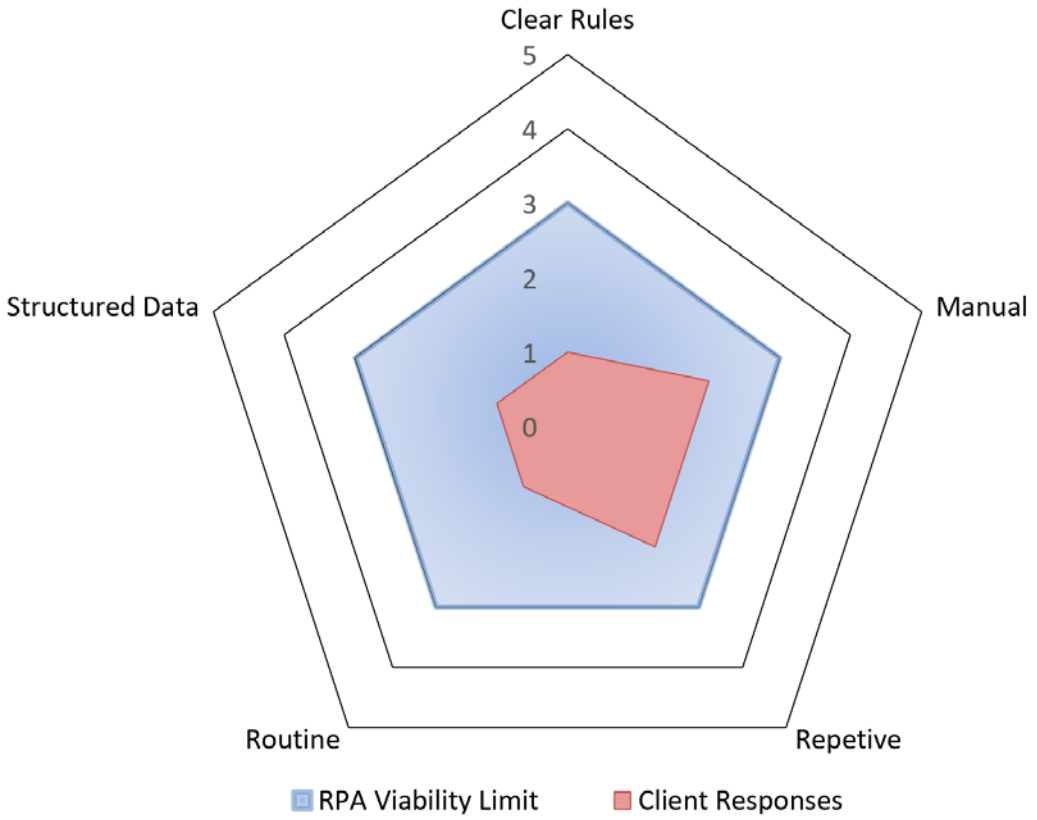
Example - Process Suitability

- **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.

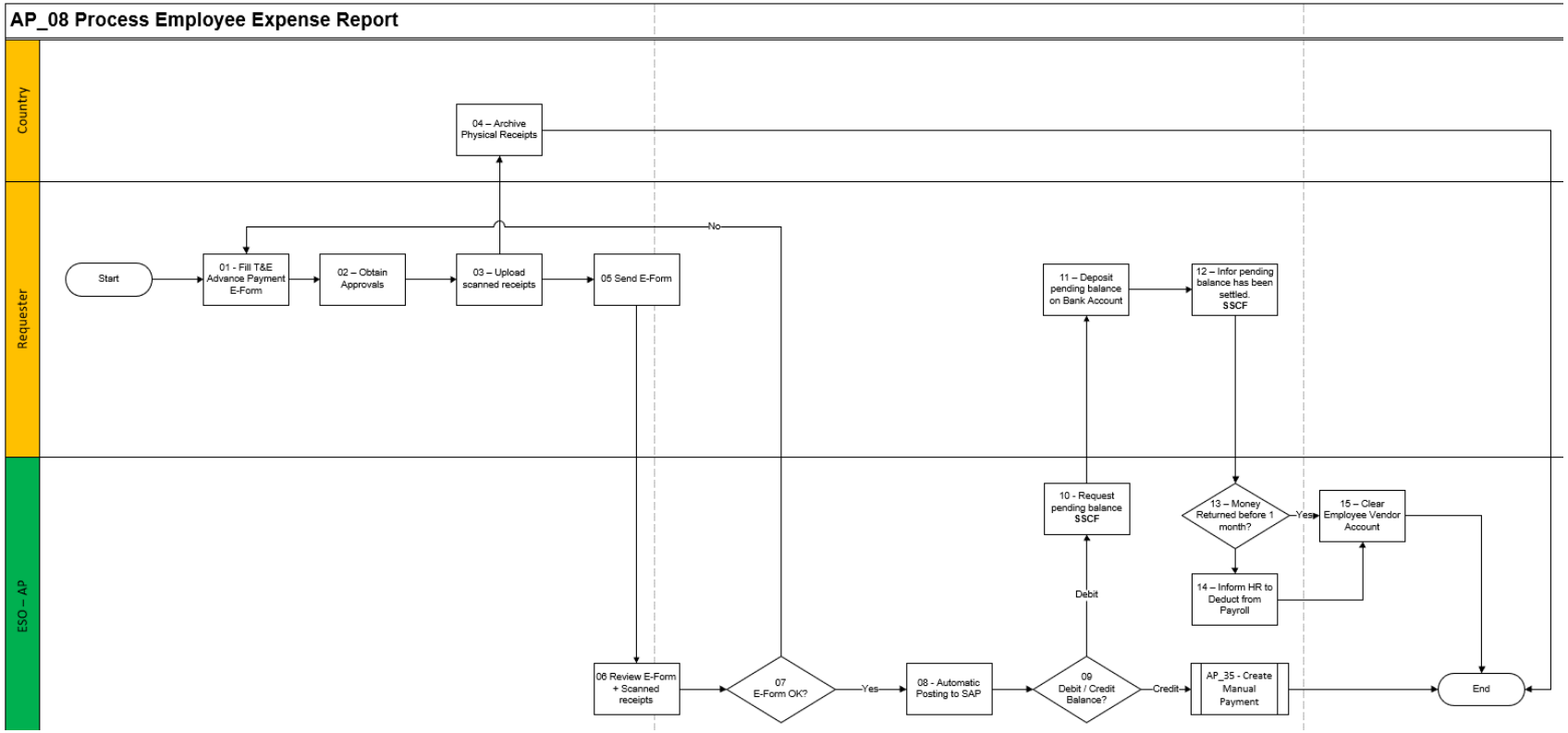
Chazey Partners

High Automation Potential

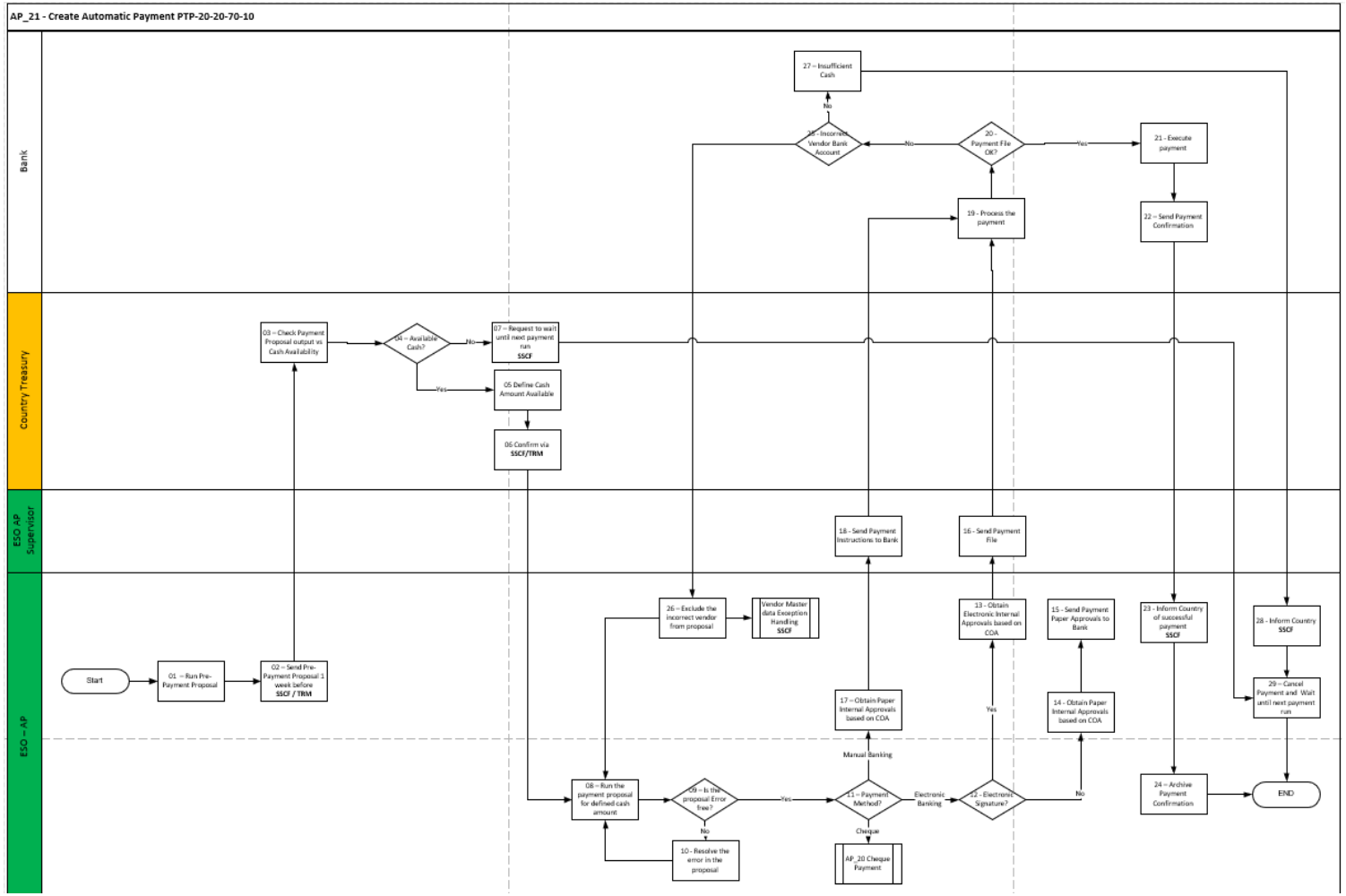
Process Employee Expense Report

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.

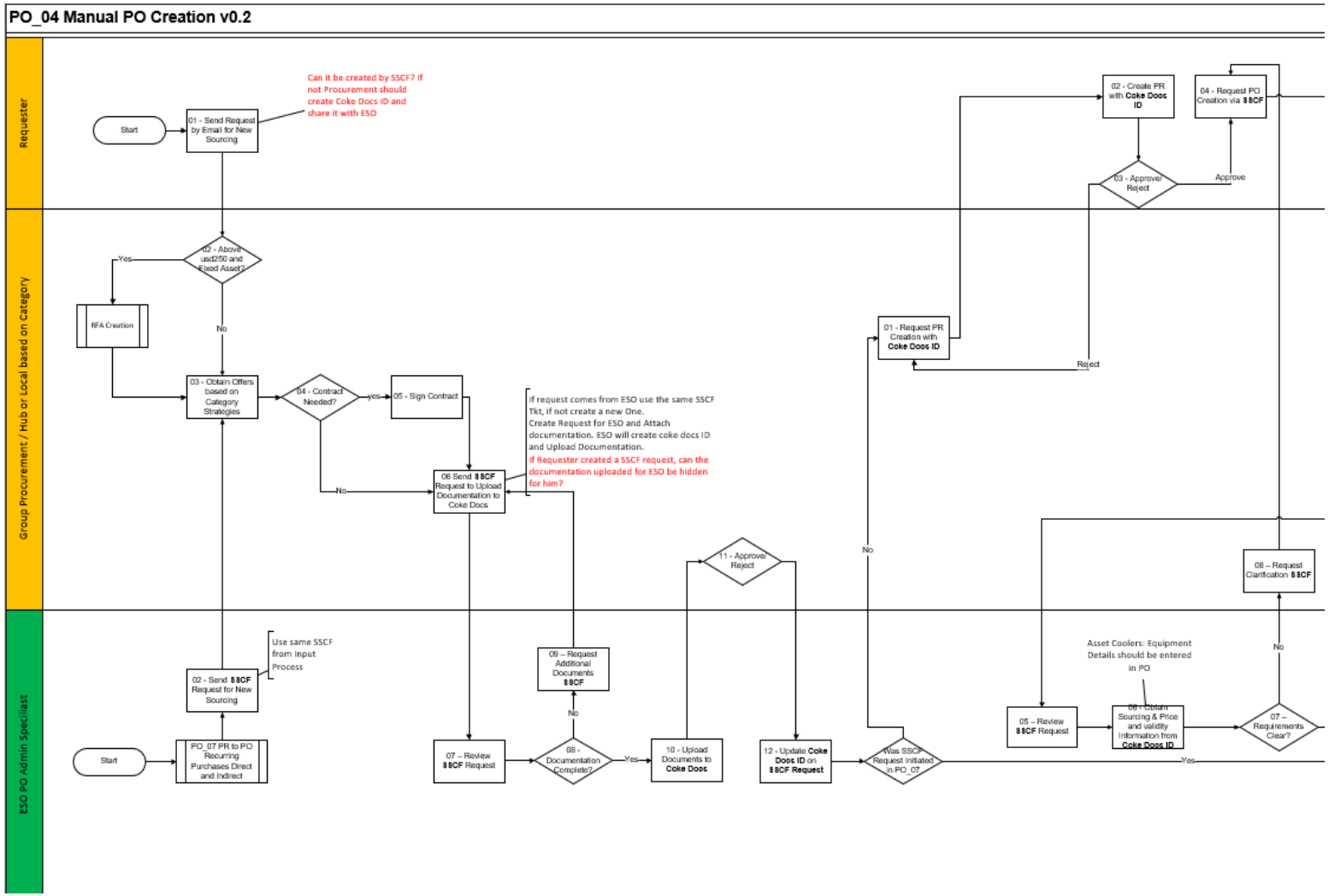
Chazey Partners

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

Procurement	Accounts Payable				
PO Administration	**Invoice Management**	**Payment**	**Travel and Expense**	**End of Period Activities**	**Handle Service Request**
20 Processes Reviewed	**28 Processes Reviewed**				
High Potential for Automation: **65%** 13 of 20 processes	High Potential for Automation: **29%** 8 of 28 processes				
Medium Potential for Automation: **30%** 6 of 20 processes	Medium Potential for Automation: **42%** 12 of 28 processes				
Low Potential for Automation: **5%** 1 of 20 processes	Low Potential for Automation: **29%** 8 of 20 processes				

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: High Potential | Medium Potential | Low Potential

Chazey Partners

Potential In Scope Processes - PTP

Procurement

PO Administration

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

Accounts Payable

Invoice Management

- Receive Scan, Verify Physical Invoices
- Receive Invoices (Electronic)
- PO (MM) Invoice Processing
- Non-PO (FI) Invoice Processing
- PO (MM) - Post Additional Costs
- PO (MM) - Import Invoice Processing
- Processing Invoice Exception - Price Diff
- Processing Invoice Exception – Qty Diff
- Processing Invoice Exception - GR Missing
- Automatic Invoice Rejection
- Manual Invoice Rejection
- Post Back Invoices to Supplier/Employees

Payment

- Create Automatic Payment
- Create Manual Payment
- Advance Payment
- Payment Blocking
- Payment with Cheque

Travel and Expense

- Request Travel Advance Payment
- Process Employee Expense Report

End of Period Activities

- Conduct Closing Activities
- Accruals
- Reclassification of GRIR Account
- Reconcile Vendors Manual
- Reconcile Vendors Automatic
- Report and Analyse Invoices and Payments
- Post Stamp Tax
- Perform Accounts Clearing

Handle Service Request

- Handle Service Request

Legend: High Potential | Medium Potential | Low Potential

Chazey Partners

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?**

Chazey Partners

2

Develop the operating model and governance structure

Educate, educate, educate

Chazey Partners

Operating Model

Office of CIO (Strategy)

- Strategic, global services with clear linkage to vision, mission and strategic goals of organization
- Long-term perspective whose activities have more distant relationship between effort and results
- Confirm policy alignment & ratification

Business Partners (Influence)

- Work with operational leaders to achieve organizational objectives
- Provide information, tools, analysis and insight to influence decision making
- Higher level of business proximity required (de-centralized delivery)
- Need functional expertise, analytical skills and strong interpersonal skills: "hire for skill and attitude"

Centers of Expertise (Expertise)

- Professional & technical
- Deliver on organizational strategy through provision of tactical services
- Generally requires interaction with client, although less necessary to be physically situated close to business
- Policy research, development & implementation
- Generic business & functionally expert skills required: "Hire for skill, train for attitude"

Shared Services Center (Process)

- Transactional & administrative
- Regular, repeatable, transactional activities
- Results more quantifiable
- Benefit greatly from standardization, automation and technology
- Clear linkage between effort and results (outputs generally experienced in short-term)
- Less necessary to be physically situated close to business
- Process focused, service-driven skills required" "Hire for attitude, train for skill"

Internal Client

- Provides inputs and/or receives outputs of in-scope processes
- Representative of internal client signs off processes, service levels, input requirements, key performance indicators, and client's roles and responsibilities as documented in Service Partnership Agreements

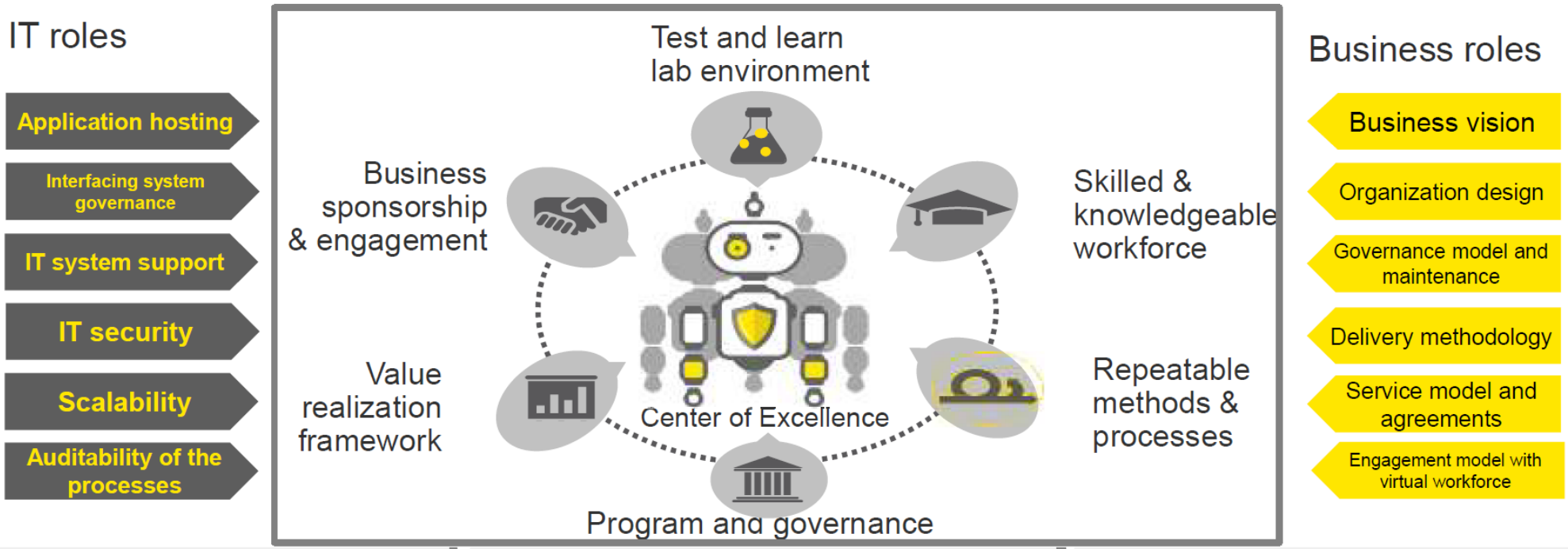
Client Interaction Framework

- Account Management
- Client Contact Management
- Service Partnership Agreements
- Client Feedback
- Continuous Improvement
- Process Control
- Performance Measurement
- Performance Reporting
- Recharging Methodology

Chazey Partners

Key Components & Interactions

Center of Excellence (CoE) landscape



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

Chazey Partners

Source: EY

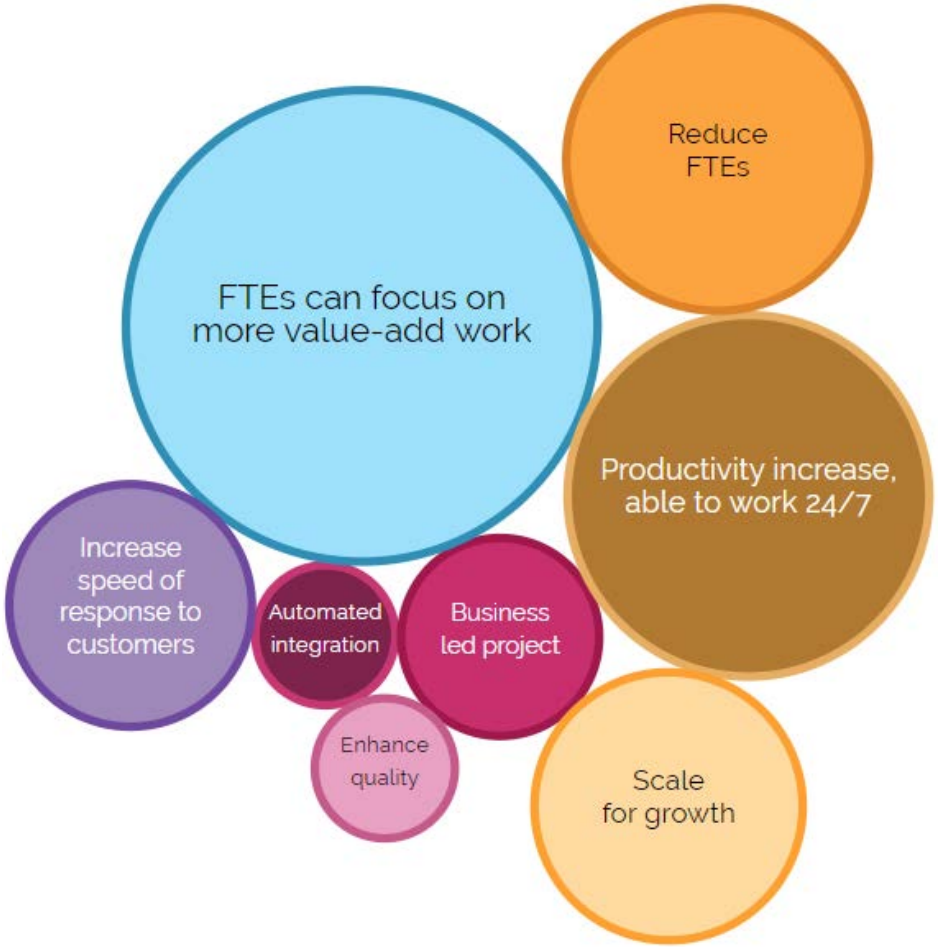
Key Elements of an RPA Center of Excellence (CoE) Governance

Strategy & Governance	Process Life Cycle	Value Measurement	Alignment & Change	Technology	Enterprise Integration
Program strategy	Process identification	Program progress measurement	Skills development	Vendor management	Business process mgmt.
Policies and standards	Process prioritization	Operational and performance metrics	Stakeholder management	Architecture and infrastructure	Transformation programs
Roles, responsibilities and structure	Automated process optimization	Benefits measurement and reporting	Organization change mgmt.	Innovation and test lab	Risk and controls
Risk management	Development and deployment		Communication	Expert network	Security
Methodology and design authority	Ongoing operations			Knowledge management	IT processes
Robotics asset management					

Source: EY

Benefits

Key CoE Role: Continue to Educate



What are the benefits of intelligent automation (IA)?

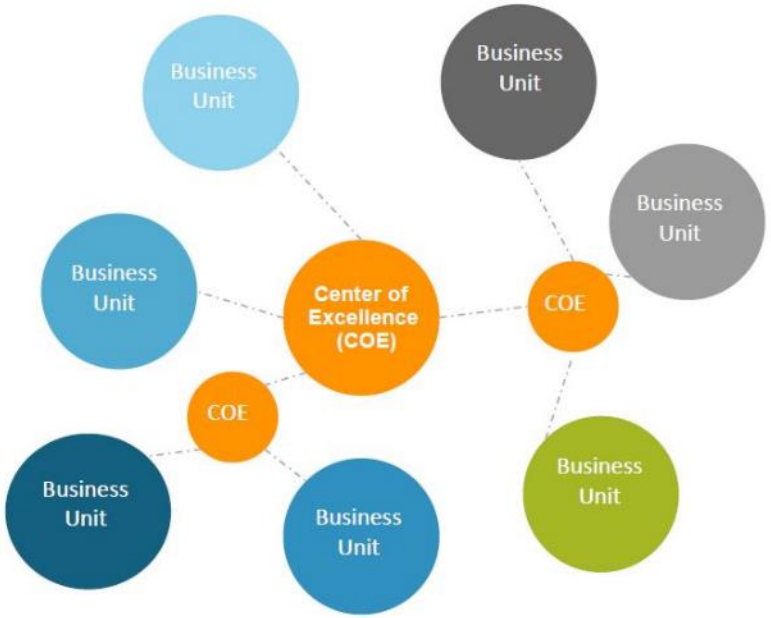
- "Quality"
- "Talent retention"
- "Speed"
- "Compliance"
- "Governance"
- "Value insights"
- "Flexibility"
- "Security"
- "Agility"
- "Business continuity"

Source: SSON – Starting on Your IA Journey, What You Should Know, 3/2018

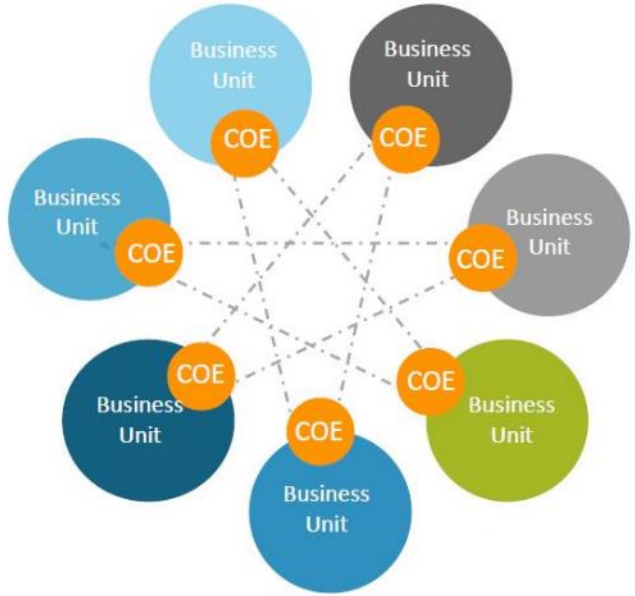
Models

Center ≠ Centralized

Centralized



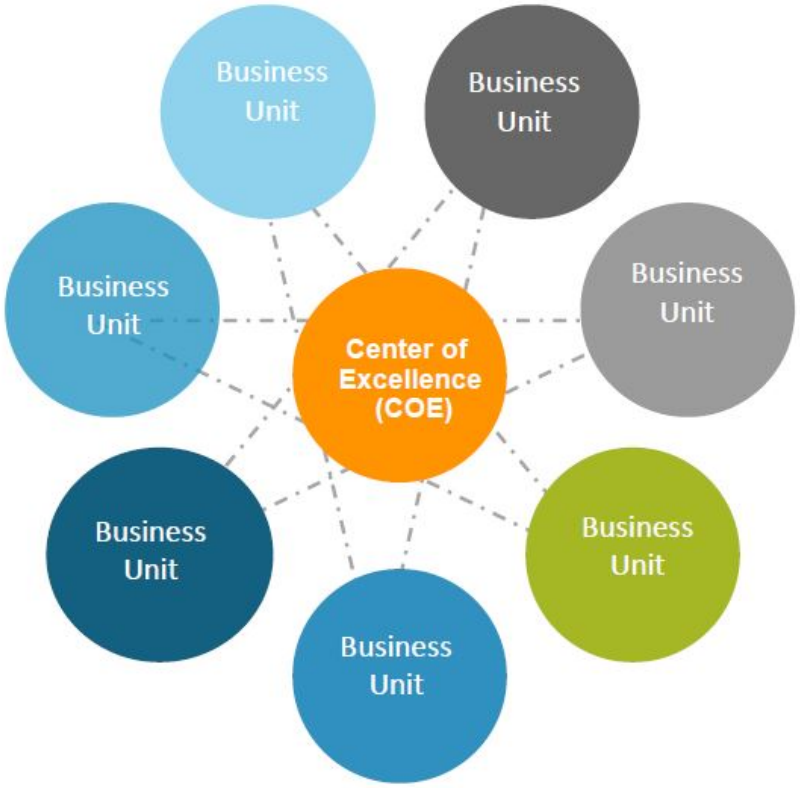
Hybrid



Federated

Chazey Partners

Centralized



One RPA CoE serving all Business Units

Advantages:

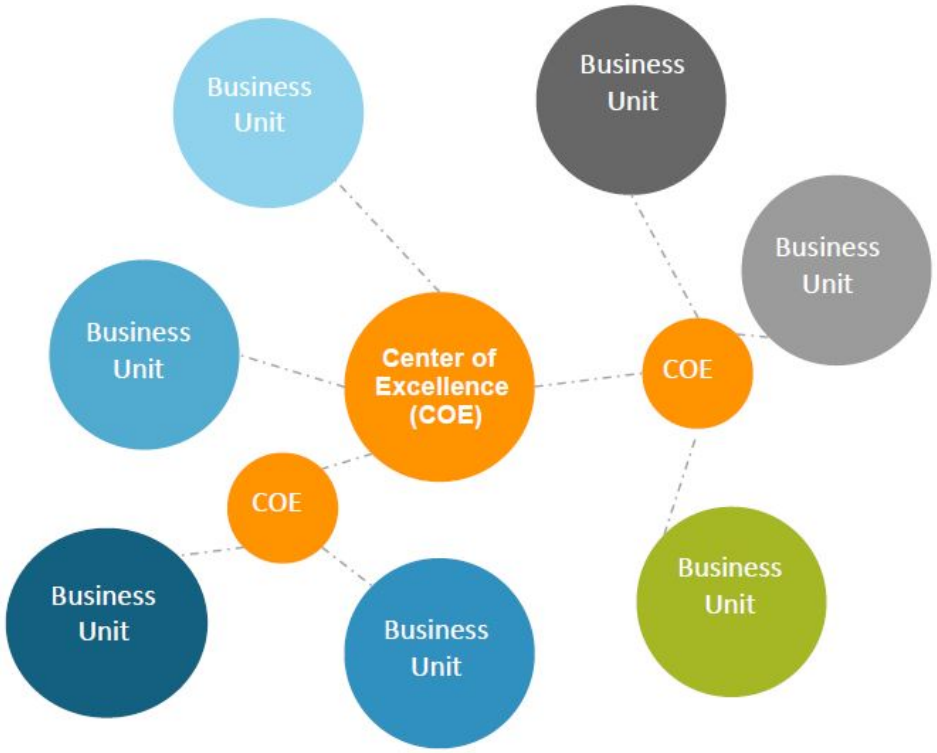
- Unified and centralized RPA support for all Business Units
- Higher expertise, lessons learnt and best practice for automation easier to disseminate within the center
- Standardized RPA deployment, support and implementation methodology

Disadvantages:

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

Chazey Partners

Hybrid



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

Advantages:

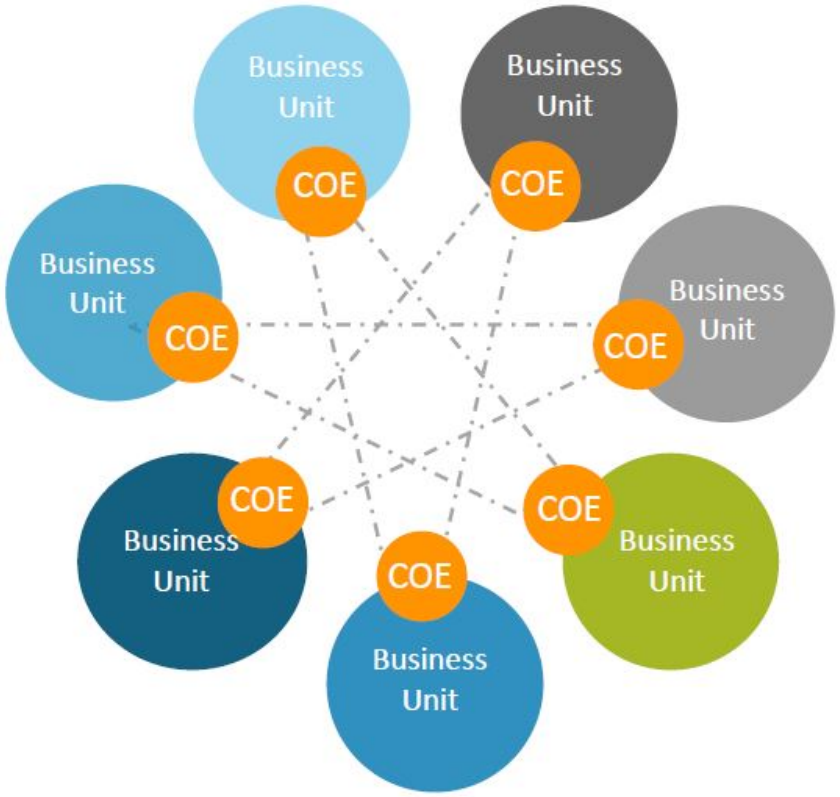
- High complexity projects delivered out of main RPA CoE, smaller RPA CoEs handle low-medium complexity automation projects
- Decreased risk of prioritization challenges due to existence of smaller dedicated RPA CoEs
- Higher process knowledge specific to business units concentrated in the smaller RPA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

Chazey Partners

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.

Chazey Partners

Develop the operating model and governance structure

Exercise:

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

Chazey Partners

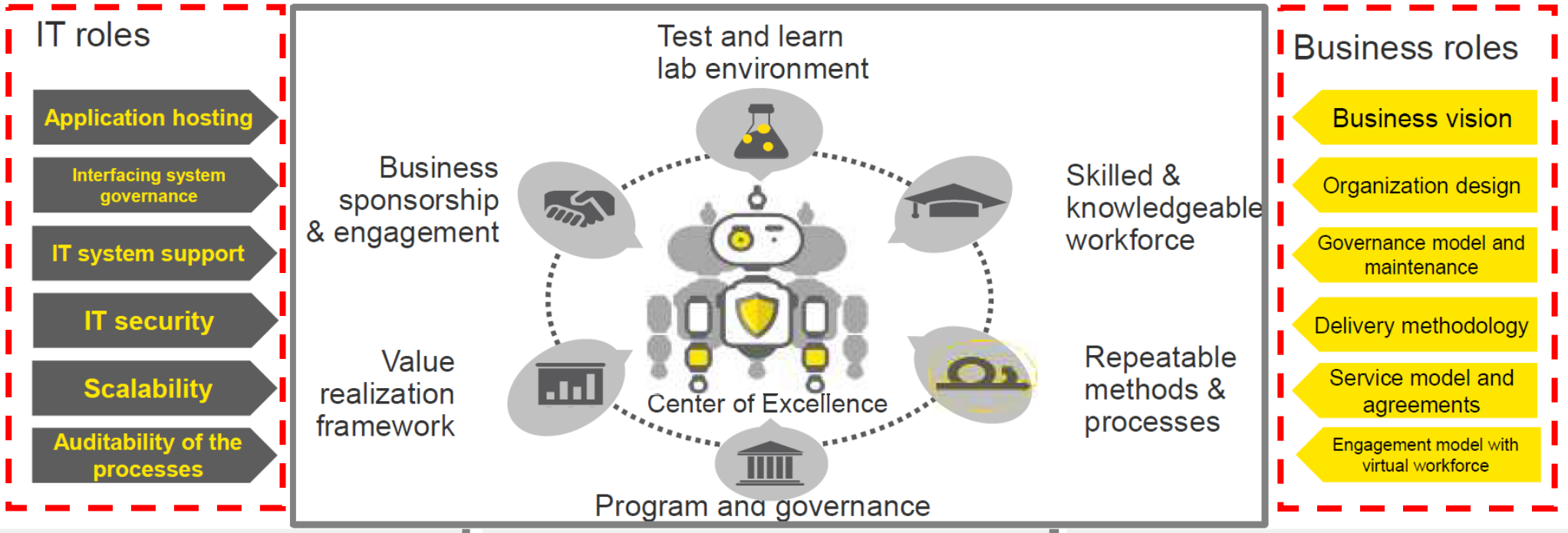
3

Collaborate with appropriate partners including business units and IT

Chazey Partners

Key Components & Interactions

Center of Excellence (CoE) landscape



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.

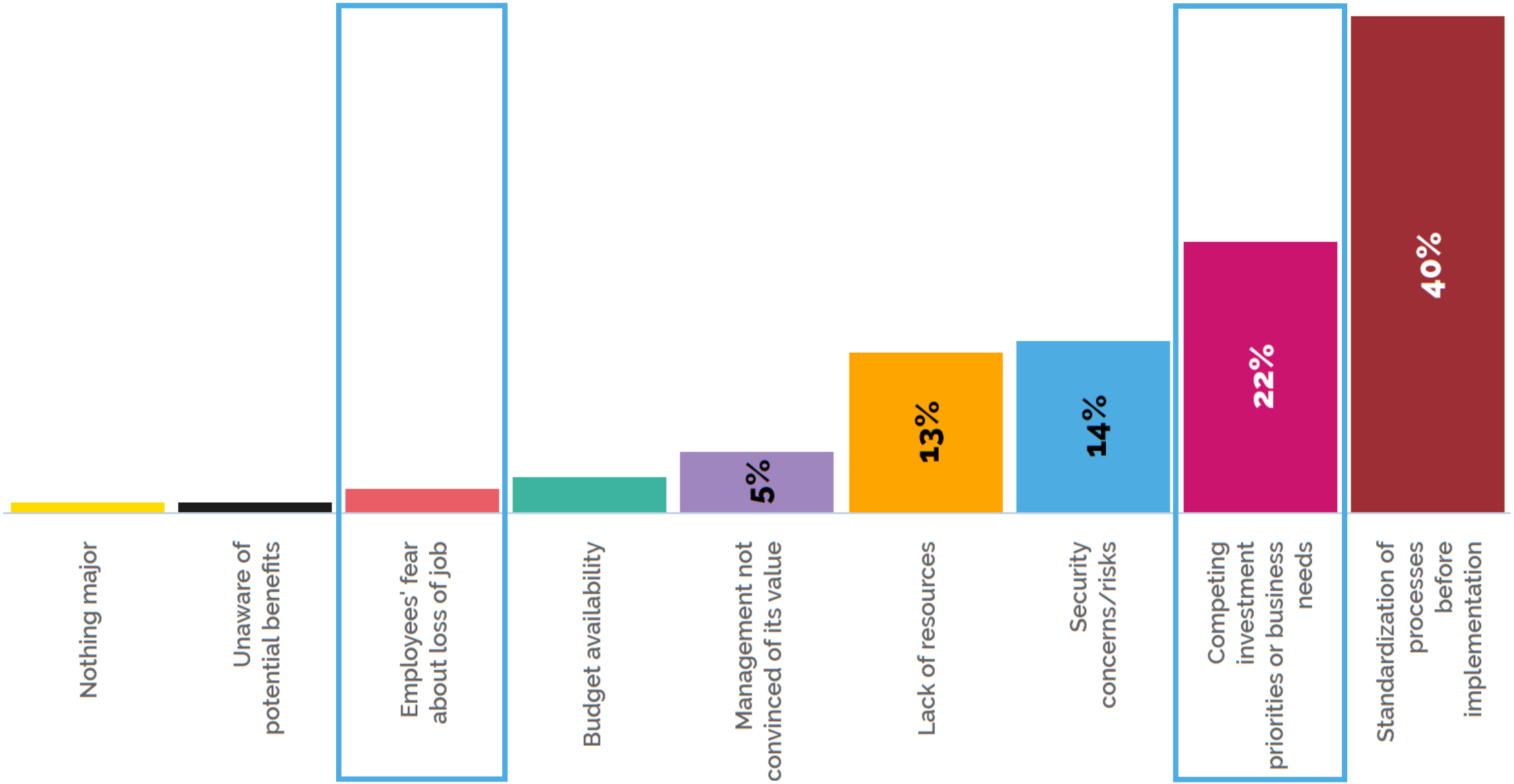
Center of Excellence functions facilitate benefits across business units

- Solution Development
- Stakeholder Enablement
- Skills Development
- Project Delivery Enablement
- Vendor Relationship Management

Chazey Partners

Source: EY

Main Challenges Implementing RPA



Source: 2017 Pulse Check: Intelligent Automation in U.S. Shared Services Market, 8/2017

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.

Chazey Partners

Source: SSON Analytics – Starting on Your IA Journey, What You Should Know, 3/2018

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.

Chazey Partners

Source: SSON Analytics – Starting on Your IA Journey, What You Should Know, 3/2018

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)

Chazey Partners

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?**

Chazey Partners

4

Deploy and maintain ‘bots’

Chazey Partners

Implementation Methodology for Robots

1	2	3	4	5	6
Process Analysis & Process Definition	Development Phase	User Testing	Transition to Production	Hypercare Monitoring	Maintenance / Adjustments

Chazey Partners

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

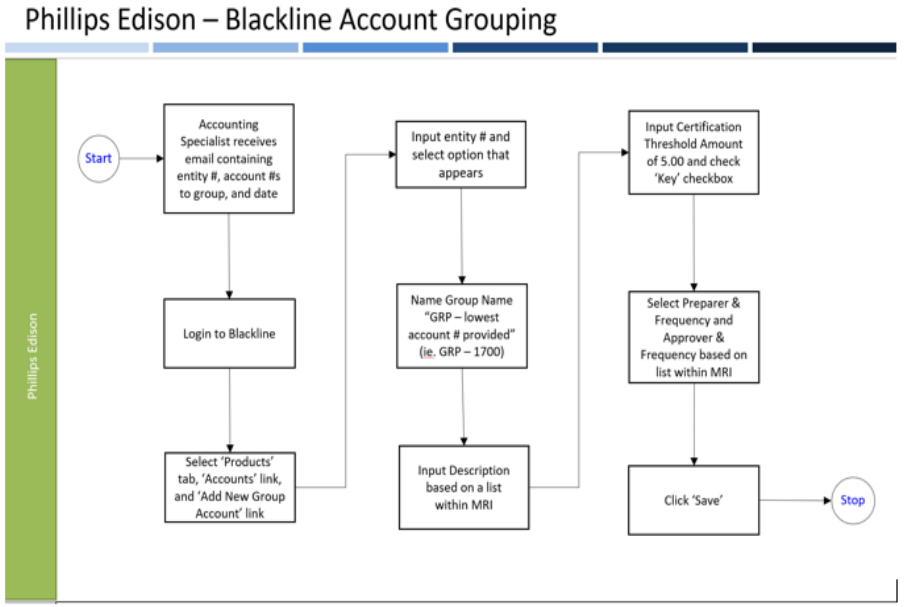
Chazey Partners

Process Documentation

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

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.



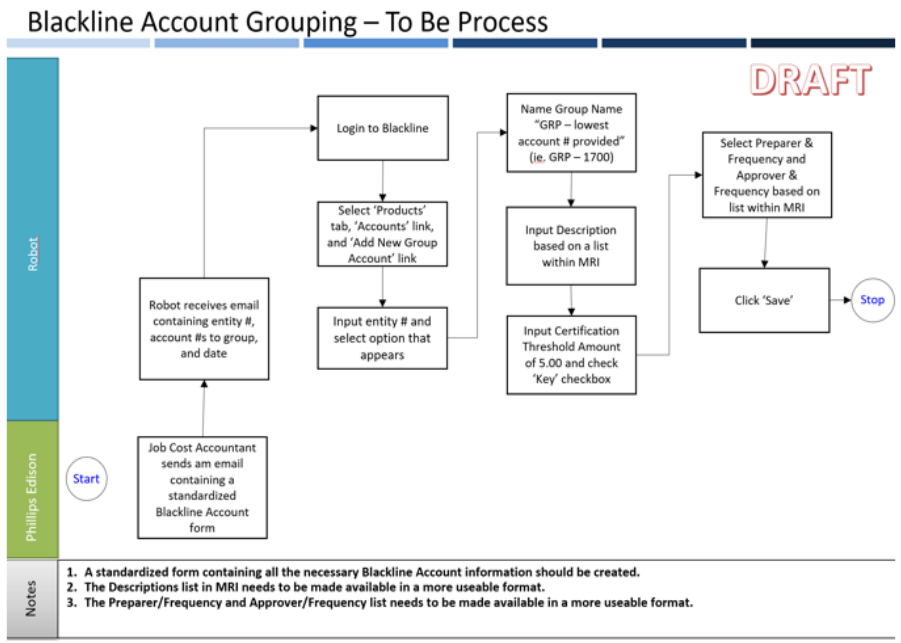
Step	Short Description of Key Process Steps
1	*Accounting Specialist receives an email requesting a grouping of Blackline accounts including the entity #, account #s to be grouped, and date (month).*
2	*Launch and login to Blackline website*
3	*Select 'Products' tab, 'Accounts' link, and 'Add New Group 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*

Chazey Partners

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



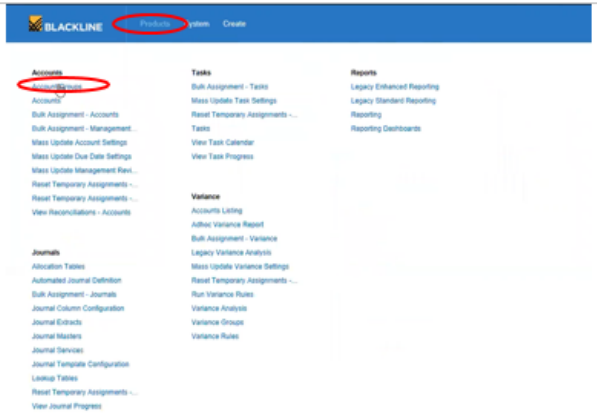
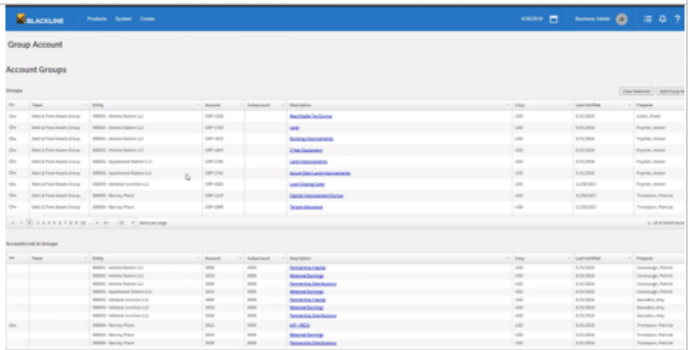
Step	Short Description of Key Process Steps
1	*Job Cost Accountant sends an email utilizing a standardized form requesting a grouping of Blackline accounts including the entity #, account #s to be grouped, and date (month).*
2	*Launch and login to Blackline website*
3	*Select 'Products' tab, 'Accounts' 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*

Chazey Partners

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 and select Products tab. Click Account Groups link.		

Chazey Partners

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*

T

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.*

O T

RPA Infrastructure Engineer

- *In charge or Server installations and troubleshooting*

T

RPA Business Analyst

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

T

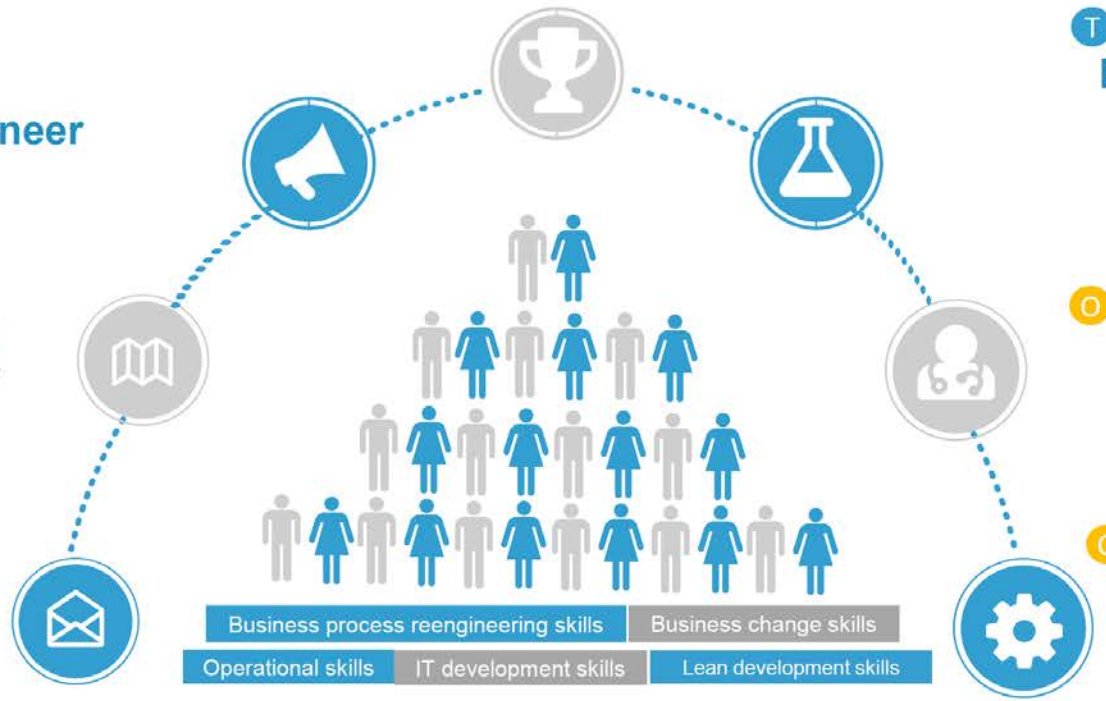
RPA Solution Architect

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

O

RPA Supervisor

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



O T

RPA Developer

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

O

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.*

O *RPA Operations* T *RPA Transitions Team*

Chazey Partners

Source: UiPath – Enable RPA CoE

Sample Position Description

RPA Supervisor - Operations

Role definition:

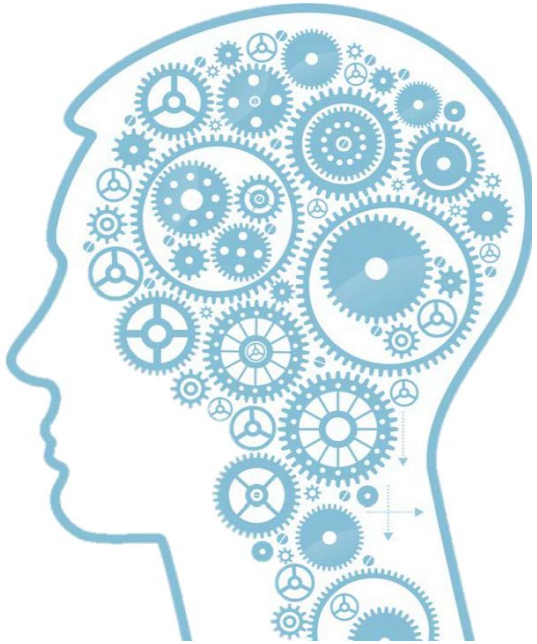
Part of future RPA Operations team.
Administers, orchestrates and controls the virtual workforce in operational environment
Focused on continuously improving the robots' operational performance using the tools and technologies in place and improving these.
Uses advanced reporting and analysis functions 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.
Basic understanding of RPA software functionality at desktop level.
Strong understanding of monitoring and auditing functions of the RPA software used.

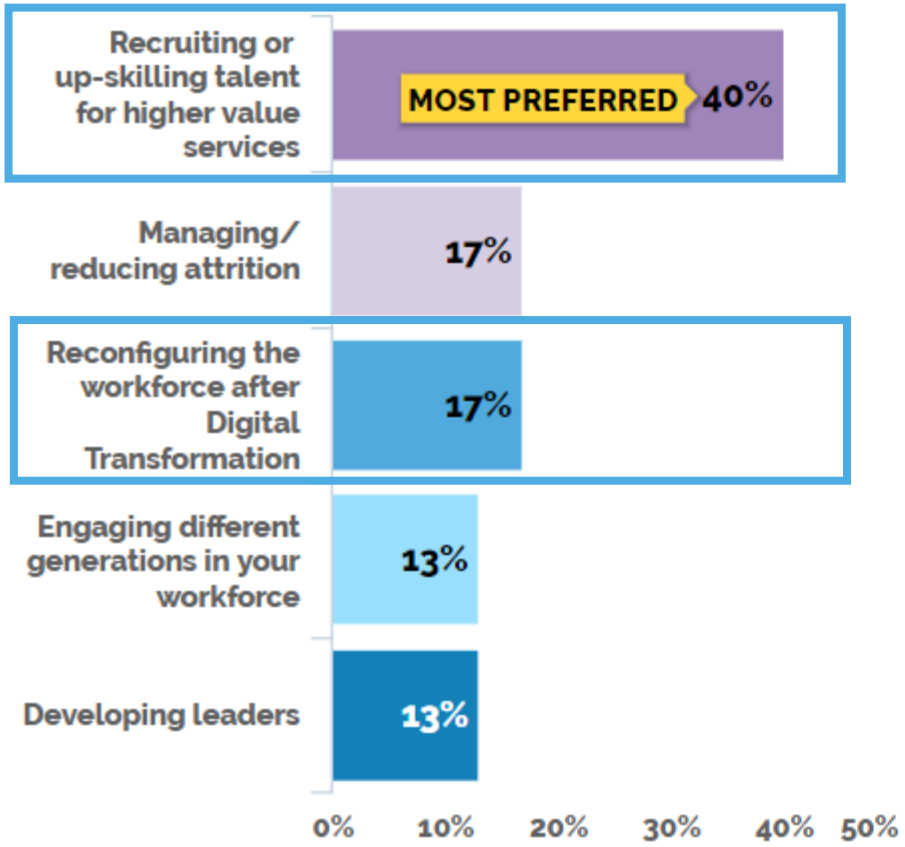


Chazey Partners

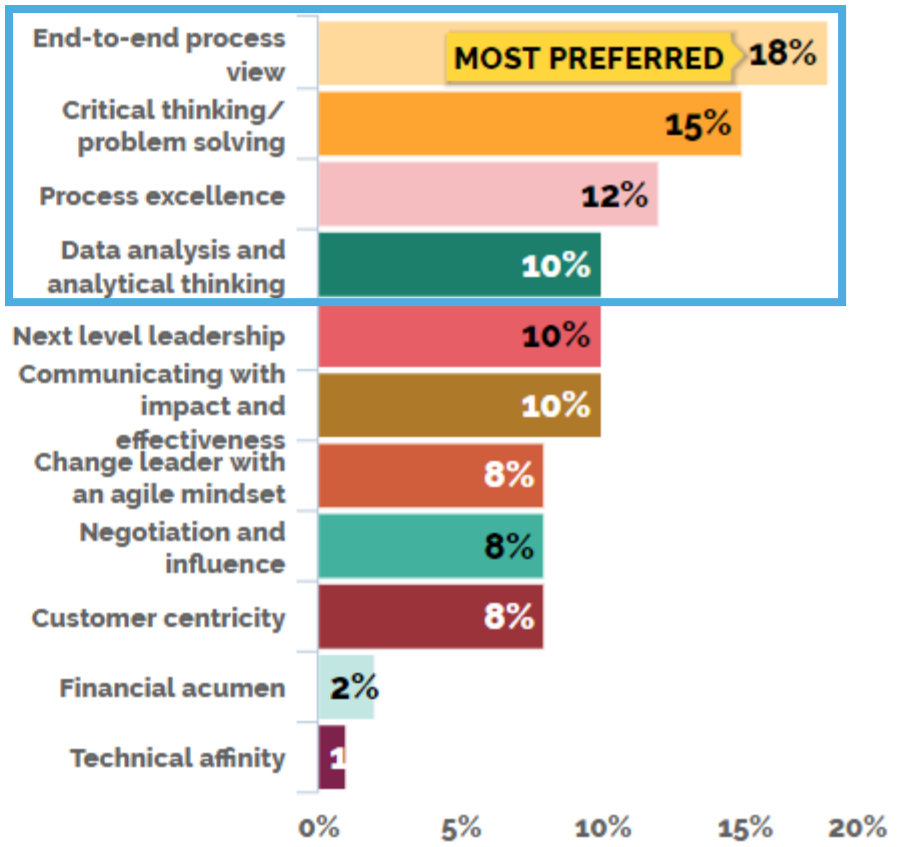
Source: UiPath – Enable RPA CoE

Talent Challenges

Top challenges in managing talent

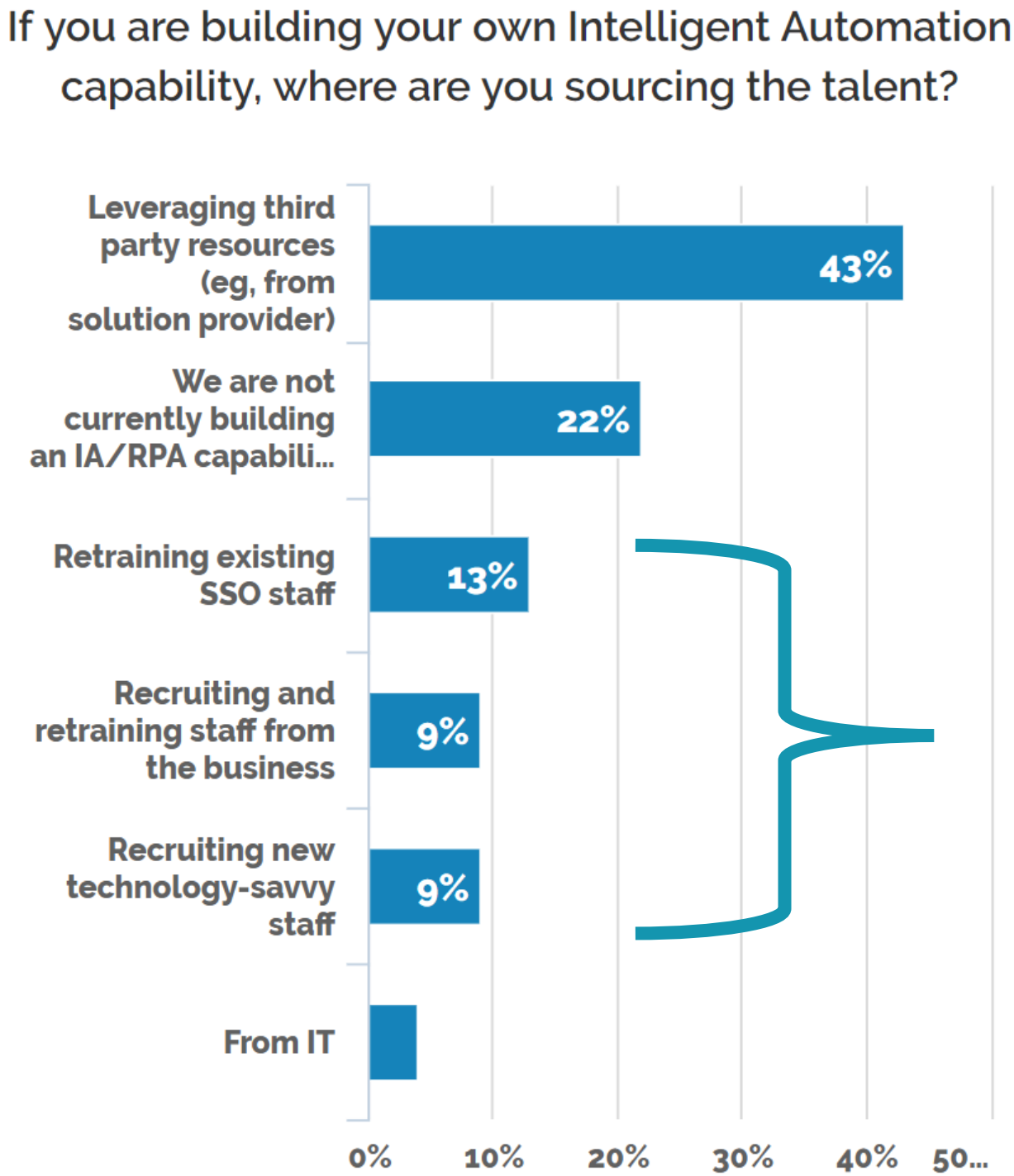


Skills gaps in Latin America Shared Services



Source: SSON Analytics - Talent and Intelligent Automation – Performance Drivers for Latin American Shared Services in 2018

Sourcing Talent



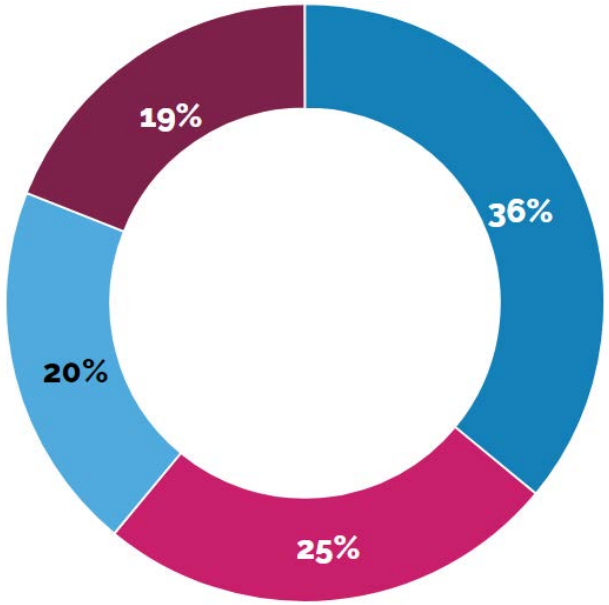
"We look for attitude and aptitude"

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

Digital Natives and Millennials are well suited for these roles

Source: SSON - Examining 2018 Trends in ANZ Shared Services Centres, 3/2018

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

MODEL	20% IN-HOUSE	36% OUTSOURCED	25% HYBRID
CONSIDERATIONS	1. Executive sponsorship 2. Investment capabilities 3. Existing organizational grounding 4. Staffing 5. Strategy 6. Planning 7. Controls & audit	1. Immediate business pressure that needs to be addressed 2. Sponsorship attainment	1. Strategy and governance, which drives prioritization and benefits 2. Choice and implementation of technology 3. Management of production automation
PROS	1. Knowledge acquisition	1. Speed 2. Responsibility	1. Fewer political repercussions 2. Self-contained 3. Faster implementation
CONS	1. Start-up cost	1. Wins are not integrated 2. IT Governance 3. Knowledge retention and expansion 4. Resistance 5. Price	1. Not developing your knowledge 2. Contracting challenges

Chazey Partners

Source: SSON – Starting on Your IA Journey, What You Should Know, 3/2018

Deploy and maintain ‘bots’

Exercise:

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

Chazey Partners

Help with the Journey

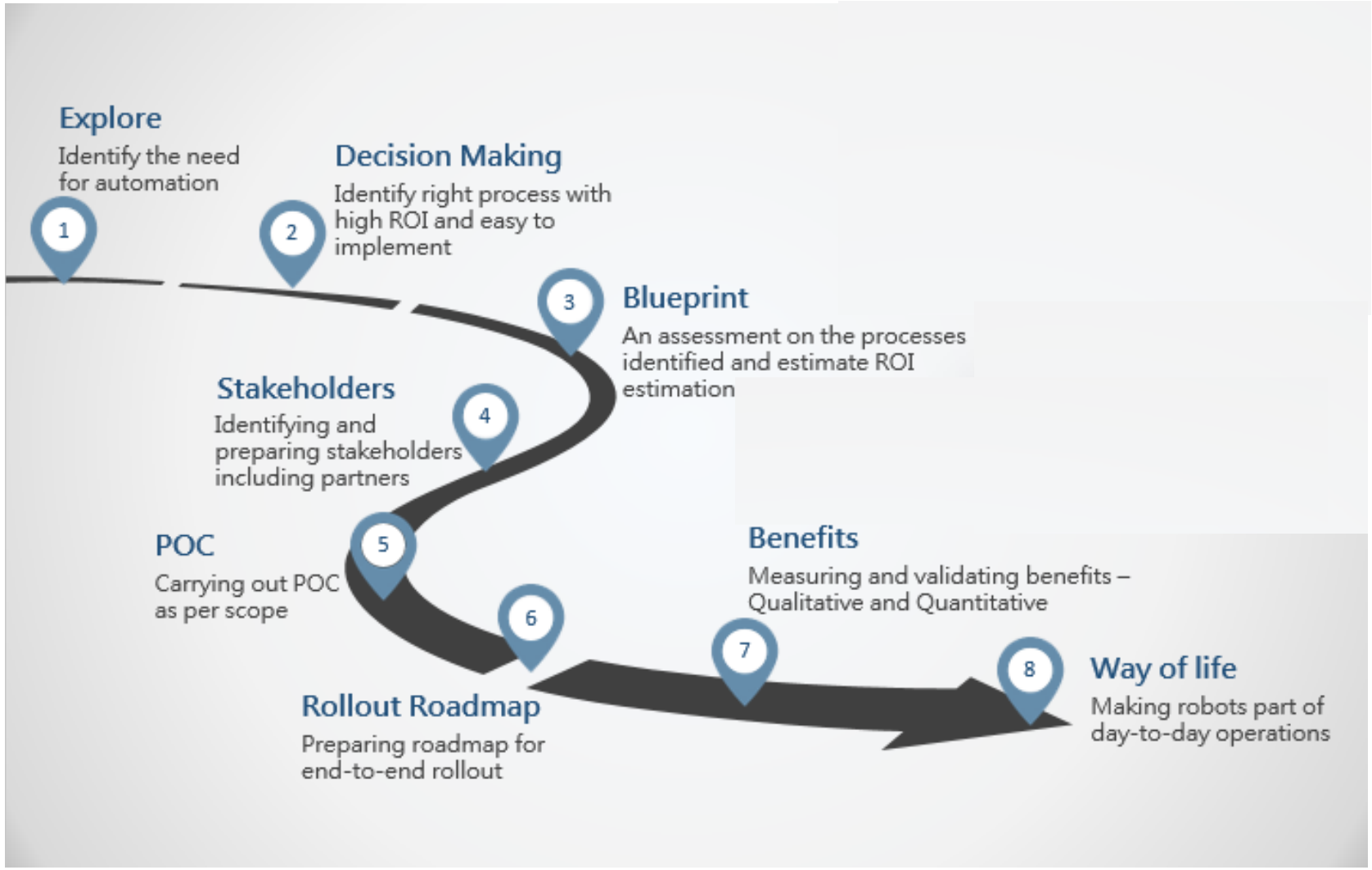
Chazey Partners

6 STEPS TO LAUNCH a COMPANY's RPA JOURNEY

1	2	3	4	5	6
Process Suitability Assessment	Proof of Concept / Pilot	Operating Model	Vendor Assessment & Tool Selection	Business Case	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



Chazey Partners

PHILLIPS EDISON & COMPANY

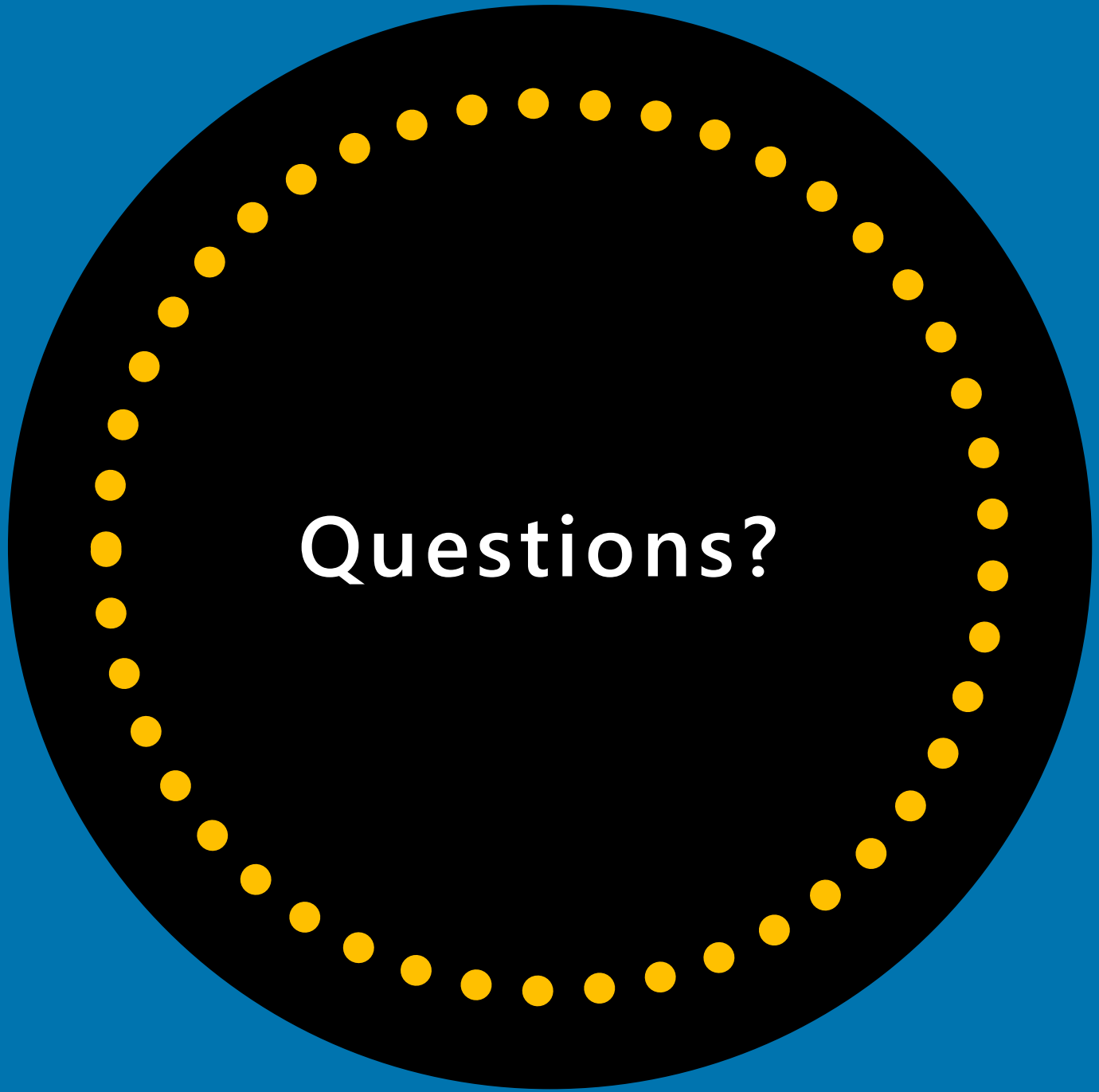
Recent Success

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.

Chazey Partners



Chazey Partners

Leverage Our Experience for Your Success

THANK YOU

Chazey Partners

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

@ChazeyPartners | #ChazeyPartners

Chazey Partners