



# ROBOTIC PROCESS AUTOMATION

**Enablement through Digital Transformation**



Enablement Through Automation...



# ROBOTIC PROCESS AUTOMATION TRANSFORMATION ENABLEMENT

Robotic Process Automation (RPA) is the latest evolution in business transformation, especially for shared services and outsource providers who are beginning to recognise its full potential.

In simple terms, RPA is automation, but unlike what we've seen before. The software can imitate human actions and work across virtually any technology. Combined with ease of use, shorter implementation times and lower cost, it's plain to see why RPA is considered such a game changer.

A handful of RPA market leaders have emerged, with an on going influx of new entrants, yet the technology we're seeing now is still in the infancy of its lifecycle development, with the promise of much more to come.

However, as with any change, implementing RPA still needs proper planning, engagement with key stakeholders, clear management of change and human resources, all supported by new operating models and frameworks in order to function optimally. For those who get this right, the benefits to the organisation can be extended far into the future as the technology continues to mature.

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# ABOUT CHAZEY PARTNERS

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## WHO WE ARE

Founded 2006, headquartered California, global offices, over 50 full-time & 70 specialist resources

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## WHAT WE DO

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

3

## WHERE WE FOCUS

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

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## THE CHAZEY DIFFERENCE

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



## Shared Services

From Business Case to Deploy, to correction & optimisation or expansion of existing operations to GBS



## Robotic Process Automation

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



## Business Transformation

Organisation restructure, HR services, recruitment & training



## Enterprise Wide Security

Business Continuity Planning, assessment & implementation

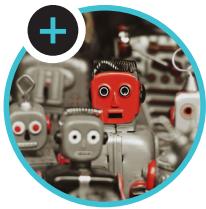
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# 1 | EXACTLY WHAT IS RPA ROBOTS, BUT NOT REALLY

Within “RPA”, the term Robot can be considered slightly misleading, conjuring up images of shiny silver robots sitting and working away at partitioned stations, in place of where people once sat. This really couldn’t be further from the truth.



## Digital Workforce

Less romantic than most imagery, but none the less, the potential for a truly digital workforce, automatically performing tasks and processes.



## Automation Software

Software solutions, commonly referred to as “bots”, which mimic or automate tasks normally performed by humans interacting with data between systems.

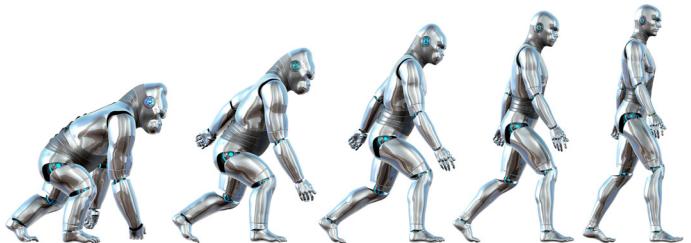


## Automatic Advantage

Automatically performing tasks or processes, potentially at a fraction of the cost, with a higher level of consistency & accuracy compared to humans.

# NOT ALL RPA IS CREATED EQUAL

## Multi-tiered Capabilities



The market has produced an array of RPA solutions with technology typically falling into three main levels of automation capability. Vendor offerings vary from publicly available, free, but more brittle “macros on steroids” to much more advanced, stable, learning solutions, sold as commercial software licenses or As-A-Service solutions.

### MULTI-TIERED

#### THREE MAIN LEVELS

##### BASIC

Automation of basic “swivel chair” tasks, replacing or mimicking mundane, routine human interactions (“record & replay”)

##### COGNITIVE

The ability to learn, adapt and work with less structured data in more complex processes (machine learning)

##### AI / IA

Artificial Intelligence or Intelligent Automation, still in its infancy, but predicted to perform much more human work, managing higher degrees of complexity, decision-making & end-to-end processing

### COMMERCIAL MODELS

#### LICENSING

- Per Robot
- Per Transaction
- Term & Multi-Year
- On Premise or Cloud

#### AS-A-SERVICE

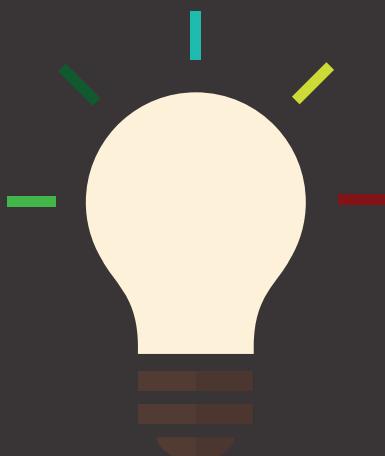
- Tech-As-A-Service
- Process-As-A-Service
- Consulting
- Training

## 2 | WHAT CAN RPA DO FOR YOU?

### WHY IT'S NECESSARY TO KNOW

#### OPINIONS ON THE IMPACT OF RPA VARIES

- High proportions of jobs entirely replaced?
- Only parts of jobs & tasks automated?
- Free up resources for more important value adding work?
- Opportunity to bring work back on shore, albeit to a digital workforce?
- Redundancy / Replacement of outsourcing



# AUTOMATION IN PRACTICE

## Benefit Potential

The benefits of RPA can depend on the organisational automation goals. There are no shortage of statistics projecting what organisations could or should be able to achieve, but there are some commonly held factors. Ultimately, huge potential is possible if done properly. Whilst it's true that RPA is generally easier than typical technology implementations, it is by no means easy! Have clear expectations for what you want to achieve with RPA to avoid disappointment.

BENEFITS  
FROM RPA



- On Shoring
- Cost Reduction
- Cost Containment / Avoidance
- Political Advantage
- Value Adding
- Revenue
- Generation/Leakage Control
- Customer Satisfaction
- Efficiency
- Productivity
- Control & Risk Management



## GETTING THE BEST OUT OF RPA REQUIRES KNOWING WHAT YOU NEED TO ACHIEVE FROM IT

BENEFITS  
OF RPA



- **Ease of Use** limited programming skills
- **Ease of Implementation** “light” touch, with underlying systems undisturbed
- **Lower Cost-Higher Return** significantly lower cost, higher ROI

- **Workforce Flexibility** “bots” switch between tasks
- **Workforce Availability** “bots” run 24 / 7
- **Quality, Accuracy & Consistency** same task, same way, same time, same quality

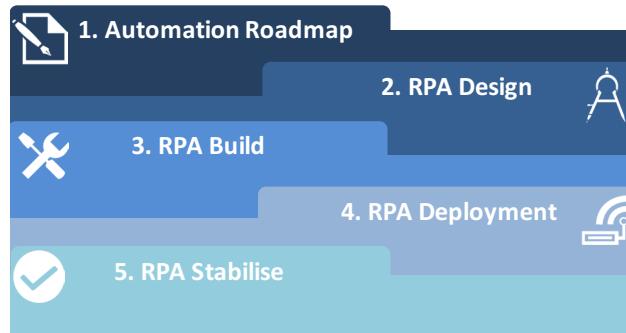
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# GETTING STARTED

## HOW & WHERE TO BEGIN

Chazey Partners' end-to-end Automation Methodology can take you through assessing your readiness, building a business case, designing an operating model, selecting potential vendors, managing business change and developing an appropriate roadmap. This same rigour is applied throughout design, build and deployment phases to deliver tangible lasting benefits and return on investment.

### END-TO-END AUTOMATION IN FIVE PHASES



- Assess opportunities to automate, Proof of Concept, operating model, automation roadmap & business case
- Design To-Be automations & processes
- Build process automations, train staff, & set-up end-state
- Fully operational end-state with new automations
- Process-orientated, client-focused, continuous improvement

## AUTOMATION SUITABILITY

### Start of the RPA Journey

#### 01 REPETITIVE TASKS

Tasks which are performed repeatedly, several times over per day, week or month, in the same fashion, time after time with little to no variation in performance.

#### 03 ROUTINE BASED

Tasks which are performed routinely on a daily, weekly, monthly schedule, at roughly the same time or frequency each cycle.

#### 05 STRUCTURED DATA

Processes which interact with clear, defined, well structured data extracted directly from or entered into IT systems.

#### 02 MANUAL ENTRY

Tasks which are performed manually when extracting, validating, transferring, entering and uploading data from and into IT systems.

#### 04 CLEAR RULES

Processes and tasks which follow clear, defined business rules, without minimal interruption, manipulation or exception handling.

#### 06 DISPARATE SYSTEMS

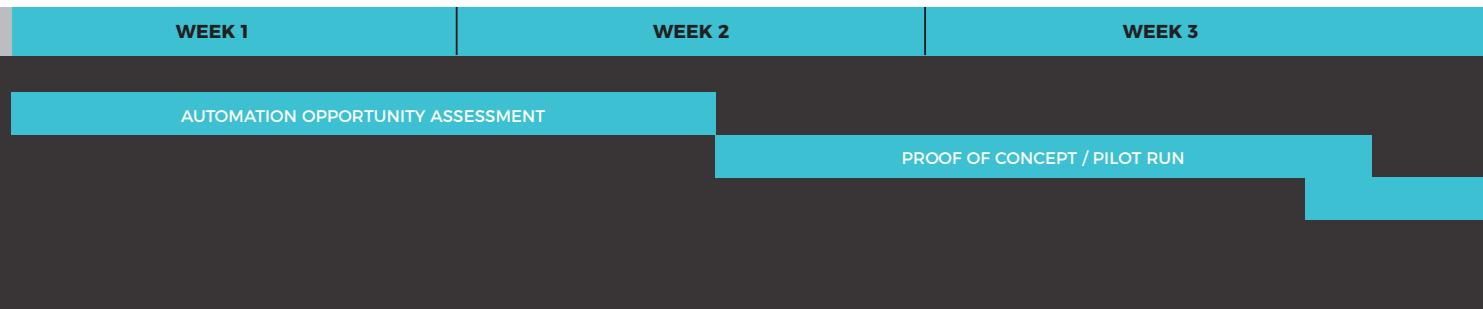
Where data must be shared across unintegrated disparate IT systems through human intervention.



**Process activities meeting these criteria, are generally best suited to automation**

# A ROADMAP FOR AUTOMATION

With all the sound propositions that RPA can promise, business leaders are advised to define a structured framework as the building blocks with clear, tangible benefits and correctly defined expectations before embarking on RPA initiatives.



## ➤ 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.

## ➤ 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.

## ➤ BUSINESS CASE

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



At Chazey Partners, our Robotic Process Automation Assessment and Roadmap offers our clients a clear, structured framework with which to launch a successful RPA journey and set expectations. It is to ensure the technology is embedded perfectly within the existing systems and business operations, and empower your business to be future ready with dynamic adjustment of process changes along the automation journey.

#### WEEK 4

#### WEEK 5

#### WEEK 6

##### BUSINESS CASE AND OPERATING MODEL

##### SOLUTIONS / VENDORS ASSESSMENT & ROAD MAP

###### ➤ OPERATING MODEL

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

###### ➤ SOLUTIONS & VENDORS

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

###### ➤ ROAD MAP

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

# GLOBAL LOGISTICS COMPANY

## AUTOMATION ROADMAP & PROOF OF CONCEPT

### THE CHALLENGE

Headquartered in Asia, a global leader in transportation, relocation, logistics and storage services across 60 countries.

Chazey was engaged to undertake a Robotic Process Automation Proof of Concept Pilot and Automation Roadmap Assessment including Vendor Selection for a manual, time-consuming employee expense process, with a side-by-side comparison of two specific identified RPA tools.

### THE SOLUTION

Chazey designed and built identical “bots” separately in both RPA tools, then tested and deployed in the live production environment. The performance of both was then analysed and compared against each other and against the equivalent human performance to perform the tasks. Additional qualitative data was reported including operation and maintenance of both tools, impacts on people, process, technology and customer and a business automation roadmap, vendor recommendations and an implementation plan prepared.



# GLOBAL LOGISTICS COMPANY

## AUTOMATION ROADMAP & PROOF OF CONCEPT

### THE APPROACH

The process selected met three key criteria:

1. High transaction volumes
2. Rules based process dependent on logic
3. Mundane, repetitive and low value activities

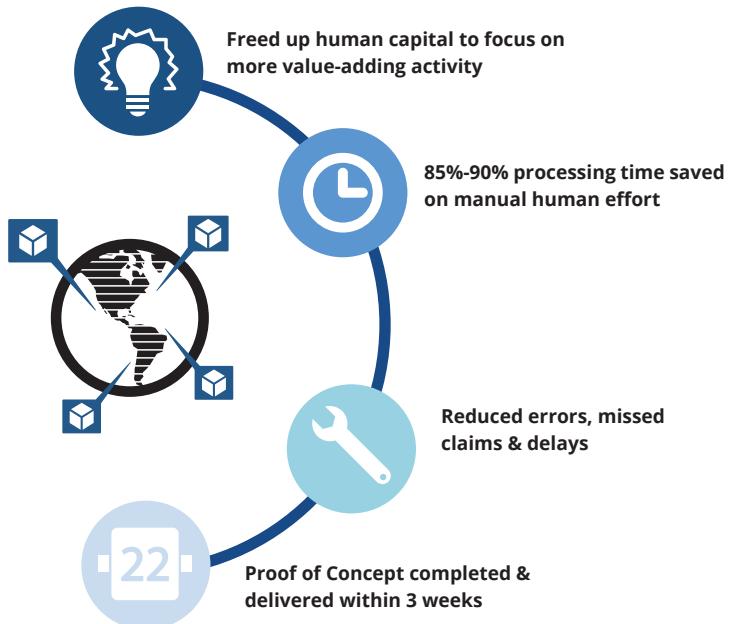
The bots were programmed to automatically locate and review expense claims submitted and then evaluate and allocate the claims for processing to specific analysts based on predefined rules and logic, including process experience, region and capacity

Once the expense claim was allocated the bots then validated certain fields in the expense claim to either pass or reject the claim. Attached receipts were automatically downloaded and organised based on claim number for analysts to access.

Finally, the bots provided an exceptions report for analyst follow-up.

### THE RESULT

Both bots realised significant, comparable productivity gains, and the differences in ease of use and stability handling exceptions were incorporated into the vendor selection process. One of the RPA tools was chosen for a further extended pilot to demonstrate the success of the solution and was retained in permanent production.



# BEST PRACTICE

## LESSONS FROM THE FRONT LINE



### TRANSFORM

Don't just mimic, also look to improve, eliminate and simplify. Obvious, but smaller time-consuming tasks should be included to gain momentum, but don't overlook the opportunities and impacts of a wider automation strategy.



### WHY, WHAT, WHEN

Have clear objectives and expected achievements in mind for the automation journey, be realistic with timelines, outcomes and requirements. Plan how to optimise the utilisation of the future human workforce.



### ENGAGEMENT

Identify and engage with key stakeholders, decision makers and influencers clearly from the start and gauge expectations.



### OPERATING MODEL

Confirm an appropriate IT security policy for the proof of concept and automation roadmap and determine who and how they will manage the future digital workforce.



### SUITABILITY

Ensure tasks and processes are properly assessed for automation suitability before selection and don't underestimate the complexity and unstructured nature of manual, human activity.



### COMPATIBILITY

With a growing number of vendor options and capabilities, be sure to carefully match the RPA solution to your specific automation needs. Other important factors to consider include maintenance, upgrades, product maturity and training.

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# WHO WE'VE WORKED WITH

## SOME OF OUR VALUED CLIENTS



**First Data.**

*Coca-Cola Enterprises*

**Hellenic**  
Coca-Cola  
Passion for Excellence

**GILEAD**

**BRIDGESTONE**

**EPICOR**

CooperStandard

**GREENE KING**  
BURY ST EDMUNDS

**TRW**

**MAY GURNEY**

*Coca-Cola Icesch*

**CEMEX**

**AEROMEXICO**



**UCDAVIS**

UNIVERSITY OF CALIFORNIA

Office of the President

**FORMFACTOR INC.**

**I STATE**

**University of Northern Iowa**

**CLAREMONT UNIVERSITY CONSORTIUM**

**New Brunswick**  
Nouveau Brunswick  
CANADA

**UCSF**

**The UNIVERSITY OF IOWA**

**BERKELEY LAB**

**Travelport**

**iB** International Baccalaureate

**VARIAN**  
medical systems

**Coppel**

**BanCoppel**

**GRUPO BIMBO**  
SAB de CV

**Agrium**

Fisheries and Oceans  
Canada  
Pêches et Océans  
Canada

**BELCORP**

**Dos Pinos**  
...siempre con algo mejor.

**AXA**

**FILMTEX**

**GO** **GERDAU**



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## | OUR PROMISE! LEVERAGING OUR EXPERIENCE FOR YOUR SUCCESS

Chazey operates a flexible staffing model with over 70 specialists and consultants worldwide sharing their knowledge and expertise for the benefit of our clients.

Our clients come from both the private and public sectors from North America, LATAM, Europe and APAC. Our expertise is focused on the big four processes of Finance, HR, IT and Procurement.

All Chazey consultants come from industry as ex-practitioners from public sector, higher education and private enterprises and we pride ourselves on our ability to truly understand and adapt to each clients specific needs.

Chazey Partners has established strategic

business relationships with market leaders of Robotic Process Automation, in order to provide our clients with the very best informed advice and recommendations for their optimum automation roadmap together with the most suitable and up-to-date RPA solutions in the market.

**PHIL SEARLE**

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## MEET THE MANAGEMENT TEAM

Global Advisory & Expertise

**PHIL SEARLE**



FOUNDER & CEO

**ROBERT TOWLE**



MANAGING DIRECTOR - NORTH AMERICA

**CRAIG ACKERMAN**



PRINCIPAL, FEDERAL PRACTICE &  
REGIONAL DIRECTOR, UNITED STATES,  
GLOBAL HEAD, RPA

**ESTEBAN CARRIL**



MANAGING DIRECTOR - LATAM

AND ...

IT'S DONE