ROBOTIC PROCESS AUTOMATION

Enablement through Digital Transformation
Enablement Through Automation...
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

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

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

WHERE WE FOCUS
Finance, Human Resources, IT, Procurement, Facilities & other functions

THE CHAZEY DIFFERENCE
Practioners first, staff continuity, knowledge transfer, client engagement in transformation

1. Shared Services
From Business Case to Deploy, to correction & optimisation or expansion of existing operations to GBS

2. Robotic Process Automation
Automation assessment, proof of concept, vendor selection & provider of RPA solutions

3. Business Transformation
Organisation restructure, HR services, recruitment & training

4. Enterprise Wide Security
Business Continuity Planning, assessment & implementation
<table>
<thead>
<tr>
<th>Page</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>EXACTLY WHAT IS RPA?</td>
</tr>
<tr>
<td>7</td>
<td>NOT ALL RPA IS CREATED EQUAL</td>
</tr>
<tr>
<td>8</td>
<td>WHAT CAN RPA DO FOR YOU?</td>
</tr>
<tr>
<td>9</td>
<td>AUTOMATION IN PRACTICE</td>
</tr>
<tr>
<td>10</td>
<td>GETTING STARTED</td>
</tr>
<tr>
<td>11</td>
<td>AUTOMATION SUITABILITY</td>
</tr>
<tr>
<td>12</td>
<td>A ROADMAP FOR AUTOMATION</td>
</tr>
<tr>
<td>14</td>
<td>CASE STUDY: A LOGISTICS COMPANY</td>
</tr>
<tr>
<td>16</td>
<td>BEST PRACTICES &amp; LESSONS LEARNT</td>
</tr>
<tr>
<td>17</td>
<td>WHO WE’VE WORKED WITH</td>
</tr>
<tr>
<td>18</td>
<td>OUR PROMISE</td>
</tr>
<tr>
<td>19</td>
<td>CHAZEY GLOBAL MANAGEMENT TEAM</td>
</tr>
</tbody>
</table>
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.
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.

**NOT ALL RPA IS CREATED EQUAL**

**Multi-tiered Capabilities**

**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

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VALUE PROPOSITION

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.

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

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

• 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
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

1. Automation Roadmap
   - Assess opportunities to automate, Proof of Concept, operating model, automation roadmap & business case

2. RPA Design
   - Design To-Be automations & processes

3. RPA Build
   - Build process automations, train staff, & set-up end-state

4. RPA Deployment
   - Fully operational end-state with new automations

5. RPA Stabilise
   - Process-orientated, client-focused, continuous improvement
# AUTOMATION SUITABILITY

Start of the RPA Journey

<table>
<thead>
<tr>
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<th>REPETITIVE TASKS</th>
<th>MANUAL ENTRY</th>
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<tbody>
<tr>
<td>01</td>
<td>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.</td>
<td>Tasks which are performed manually when extracting, validating, transferring, entering and uploading data from and into IT systems.</td>
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<thead>
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<th>ROUTINE BASED</th>
<th>CLEAR RULES</th>
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<td>03</td>
<td>Tasks which are performed routinely on a daily, weekly, monthly schedule, at roughly the same time or frequency each cycle.</td>
<td>Processes and tasks which follow clear, defined business rules, without minimal interruption, manipulation or exception handling.</td>
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<tr>
<th></th>
<th>STRUCTURED DATA</th>
<th>DISPARATE SYSTEMS</th>
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<tr>
<td>05</td>
<td>Processes which interact with clear, defined, well structure data extracted directly from or entered into IT systems.</td>
<td>Where data must be shared across unintegrated disparate IT systems through human intervention.</td>
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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.

WEEK 1

AUTOMATION OPPORTUNITY ASSESSMENT

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.

WEEK 2

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.

WEEK 3

BUSINESS CASE

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

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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**

**BUSINESS CASE AND OPERATING MODEL**

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

**WEEK 5**

**SOLUTIONS & VENDORS ASSESSMENT & ROAD MAP**

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

**WEEK 6**

**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.
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.
LESSONS LEARNT

6 | 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.
WHO WE’VE WORKED WITH

SOME OF OUR VALUED CLIENTS
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-practioners from public sector, higher education and private enterprises and we pride ourselves on our ability to truly understand and adapt to each client’s 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.

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MEET THE MANAGEMENT TEAM
Global Advisory & Expertise

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MANAGING DIRECTOR - LATAM

CRAIG ACKERMAN
PRINCIPAL, FEDERAL PRACTICE & REGIONAL DIRECTOR, UNITED STATES, GLOBAL HEAD, RPA
AND ...

IT'S DONE