

Chazey Partners

Discovering and Selecting the RIGHT Processes for Your Robotic Process Automation (RPA)



“

At Chazey, we believe the cornerstone of your RPA success lies in the process review, mapping and assessment in order to properly identify whether a process is suitable for automation. Doing the homework up front provides a documented end-to-end process in sufficient detail to build an RPA pilot and ensures greater success of an automation program.



CHUY MICHEL
Global Head of RPA
Chazey Partners



JIM JAMESON
Global RPA Delivery Manager
Chazey Partners

01

INTRODUCTION

Did you know that employees spend anywhere from 25-45% of their time on manual activities that could be automated? One solution to these “processing” ills is Robotic Process Automation (RPA). The term “Robot” can be considered slightly misleading, conjuring up images of shiny metal robots. In reality, it is automation software that mimics a human’s actions/activities of a business process. The introduction of a digital workforce to work along with their human counterparts is a game changer in how to get things done!

It is a common tendency for organizations to overshine on the “R” of Robotics and “A” of Automation, but forget the “P” of Process in R-P-A. According to SSON Analytics, “wrong process selection” is the leading cause of RPA project failures followed by “wrong tool selection”, “insufficient change management support”, and “lack of experience”.

Selecting the wrong process to automate can cause the greatest headaches and is generally related to a highly complex, multi-step process where the belief is “automation will make the problem go away”. This approach can quickly get bogged down, giving RPA a bad name and resulting in perceived “failure” that could have been avoided with more strategic foresight in evaluating the process.

At Chazey, we believe the cornerstone of success lies in the process review, mapping and assessment in order to properly identify whether a process is suitable for automation. Doing the homework up front provides a documented end-to-end process in sufficient detail to build an RPA pilot and ensures greater success of an automation program.

This article shares with you the key steps to successful process selection and helps you lay a solid foundation to your automation journey:

- Identify candidate processes for RPA
- Prioritize and select candidate processes
- Develop a strategic Automation Roadmap


02

TRANSFORM – DON'T JUST AUTOMATE, “ELIMINATE, SIMPLIFY & STANDARDIZE”



As mentioned previously, RPA should not simply be implemented to support the “as-is” process, without examining the current process and identifying areas for improvement. Reviewing a process from end-to-end with a focus on automation can help identify those steps that can be simplified, standardized and potentially eliminated altogether. Utilizing traditional business transformation disciplines along with RPA can be a catalyst for better process design.

We recommend our clients have a strong understanding of their current business environment and a basic understanding of RPA to recognize automation opportunities. The focus should be on opportunities which will make a tangible difference financially and help improve the overall experience of clients, employees, and system users. Companies should also assess current process performance and review relevant leading practices for immediate impact improvements.



03

IDENTIFYING CANDIDATE PROCESSES

The ideal candidate process for RPA is one that follows clear defined business rules with minimal interruption/manipulation or exception handling. In addition, the data should be structured, easily accessible and consistently formatted. When identifying optimal candidates for RPA, rigid applications with no integration capabilities or those that are not stable, should be avoided.



Figure 1: RPA Candidate Process Criteria

When starting an RPA journey, low complexity processes provide quick wins (low hanging fruit) to demonstrate the validity of RPA and helps build confidence and internal buy-in for the technology. RPA is a natural “next step” for organizations whose processes are supported through Shared Services or Business Process Optimization (BPO) as they are relatively more well-defined and standardized. Back office processes for multiple verticals, including Human Resources, Finance and Accounting and Information Technology, to name just a few, can benefit from RPA technology. (See Figure 2 in the next page)



RPA Automation Potential by Back Office Process

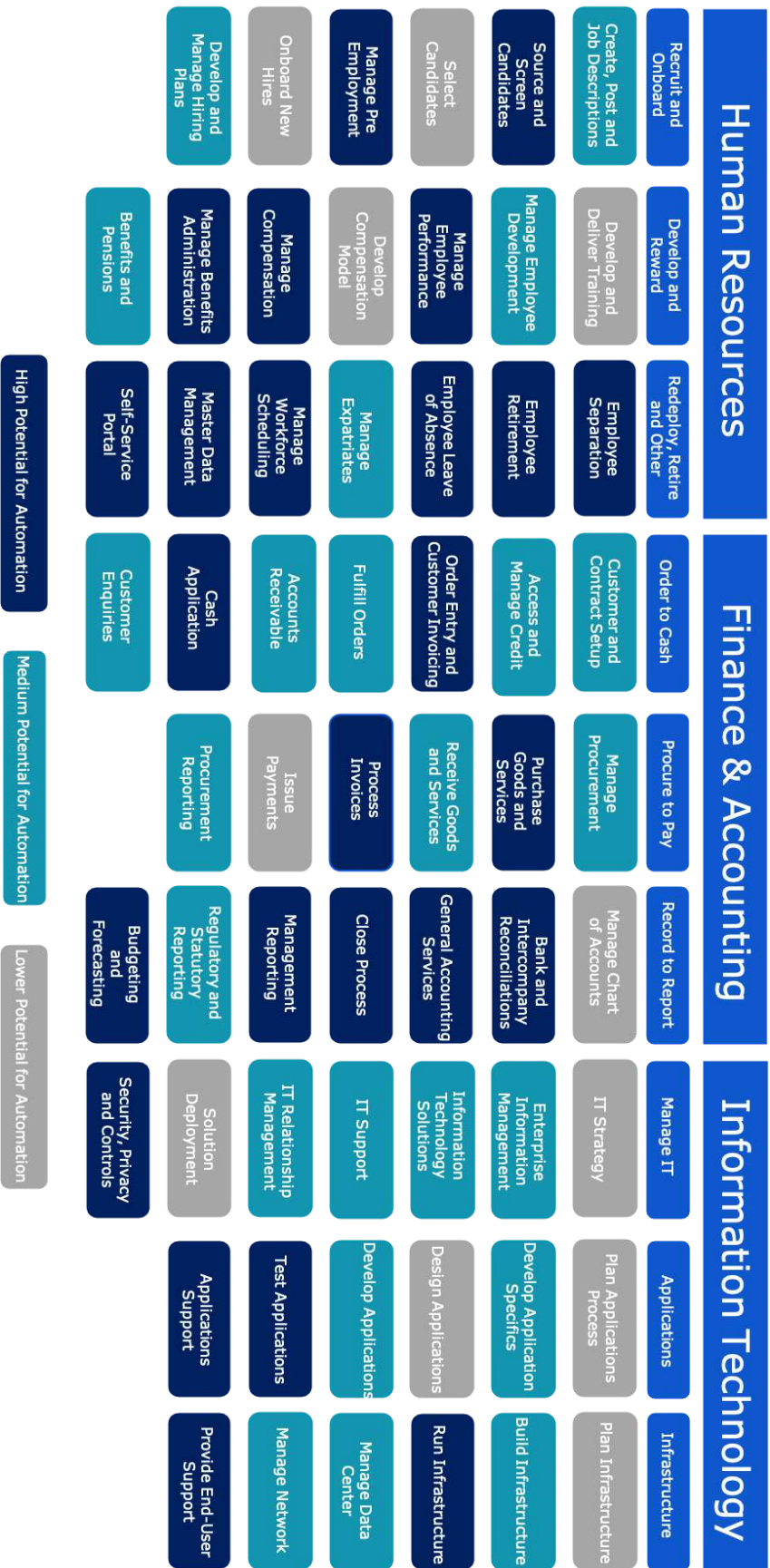


Figure 2: Potential Processes For RPA

05

PRIORITIZE AND SELECT THE RIGHT PROCESS

While the heat map above can be a useful starting point, it is important to note that NO TWO processes are the same, even when performed by companies from within the same industry. There should be a formal method for evaluating processes to identify the top candidates for RPA, balancing viability, complexity, and return on investment (ROI). At Chazey, we utilize a Process Suitability Assessment tool to produce a qualitative and quantitative assessment for each automation we build. Figure 3 below is a sample RPA assessment output.

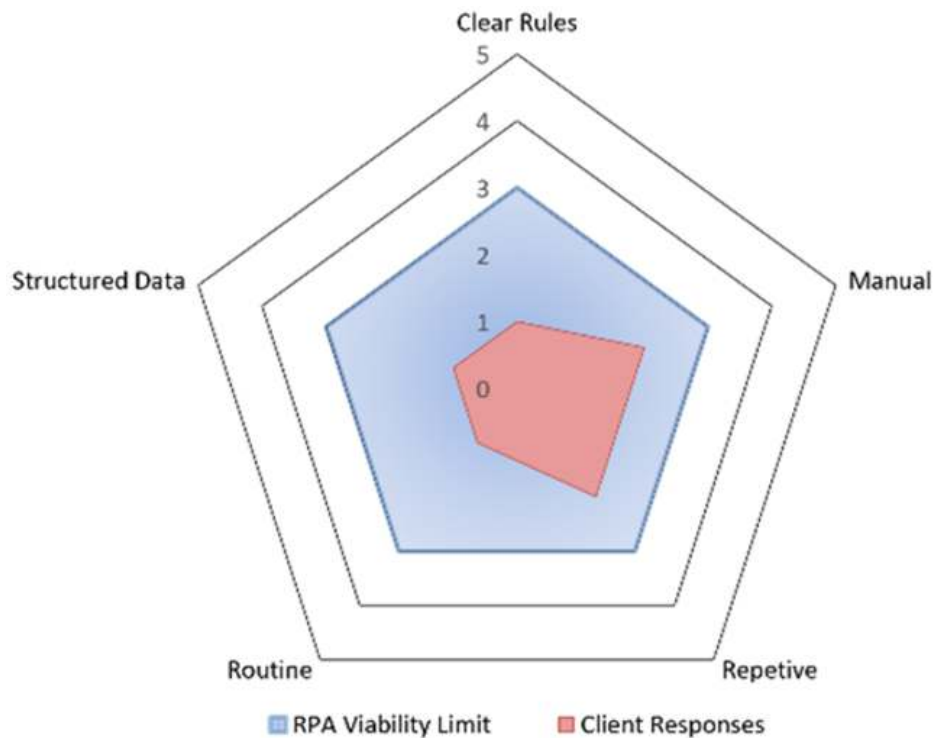


Figure 3: Sample RPA Assessment Output

PRIORITIZE AND SELECT THE RIGHT PROCESS

These qualitative aspects should then be aggregated with other quantitative elements such as:

- **Business Rules:** Clarity, predictability, and complex decision-making requirements.
- **Manual Activities:** Degree of manual activities involved in each process and total number of steps required.
- **Volume and Frequency:** Process repetitiveness, number of transactions, cycle time, peak periods, and output quality.
- **Inputs:** Process inputs, (e.g. electronic, soft documents, structured vs semi-structured); Process data source, (e.g. webpage, PDF, ERP, CRM, etc.)
- **Outputs:** Type of outputs required to finalize the process (e.g. excel, PDF, e-mail) and storage variations (e.g. file upload, SharePoint, shared file location, database, etc.)

The culmination of this comprehensive diagnostic score will be a detailed set of recommended RPA opportunities, including:

- (1) Implementation strategy, timelines, assumptions, resource requirements, benefit impact, costs, etc.
- (2) Supporting financial business case, highlighting any investments required and the financial benefits from implementing proposed solutions.

Figure 4 below provides an example of a strategic roadmap.

07

Department			Process name			Qualitative benefits		Economic value		Simplicity		Priority							
						Weighted qualitative benefits		Estimated economic value (per year)		Suitability for automation		Qualitative Benefits		Economic Value		Simplicity		Weighted Priority Chart	
						100%				100%		20%		50%		30%		100%	
P1	P2P	INVOICE PROCESSING	9.2	\$	251,894	7.7	9.2	10.0	7.7	9.1									
P2	OTC	SALES ORDER RELEASING	8.2	\$	66,288	5.9	8.2	2.6	5.9	4.7									
P3	R2R	INTERCOMPANY CONCILIATION	3.8	\$	13,636	6.3	3.8	0.5	6.3	2.9									
P4	HR	WORK CERTIFICATES	4.0	\$	35,985	7.2	4.0	1.4	7.2	3.7									
P5	OTC	CREDIT VALIDATION	4.7	\$	13,494	6.6	4.7	0.5	6.6	3.2									
P6	SOURCING	SOURCING VENDORS REPORT	7.7	\$	189,394	7.8	7.7	7.5	7.8	7.6									
P7	ACCOUNTING	GL CONCILIATION	7.1	\$	113,636	5.7	7.1	4.5	5.7	5.4									
P8	P2P	PAYMENT PROPOSALS	5.6	\$	117,116	7.7	5.6	4.6	7.7	5.7									
P9	OTC	CUSTOMER IDENTIFICATION	5.9	\$	106,534	4.9	5.9	4.2	4.9	4.7									

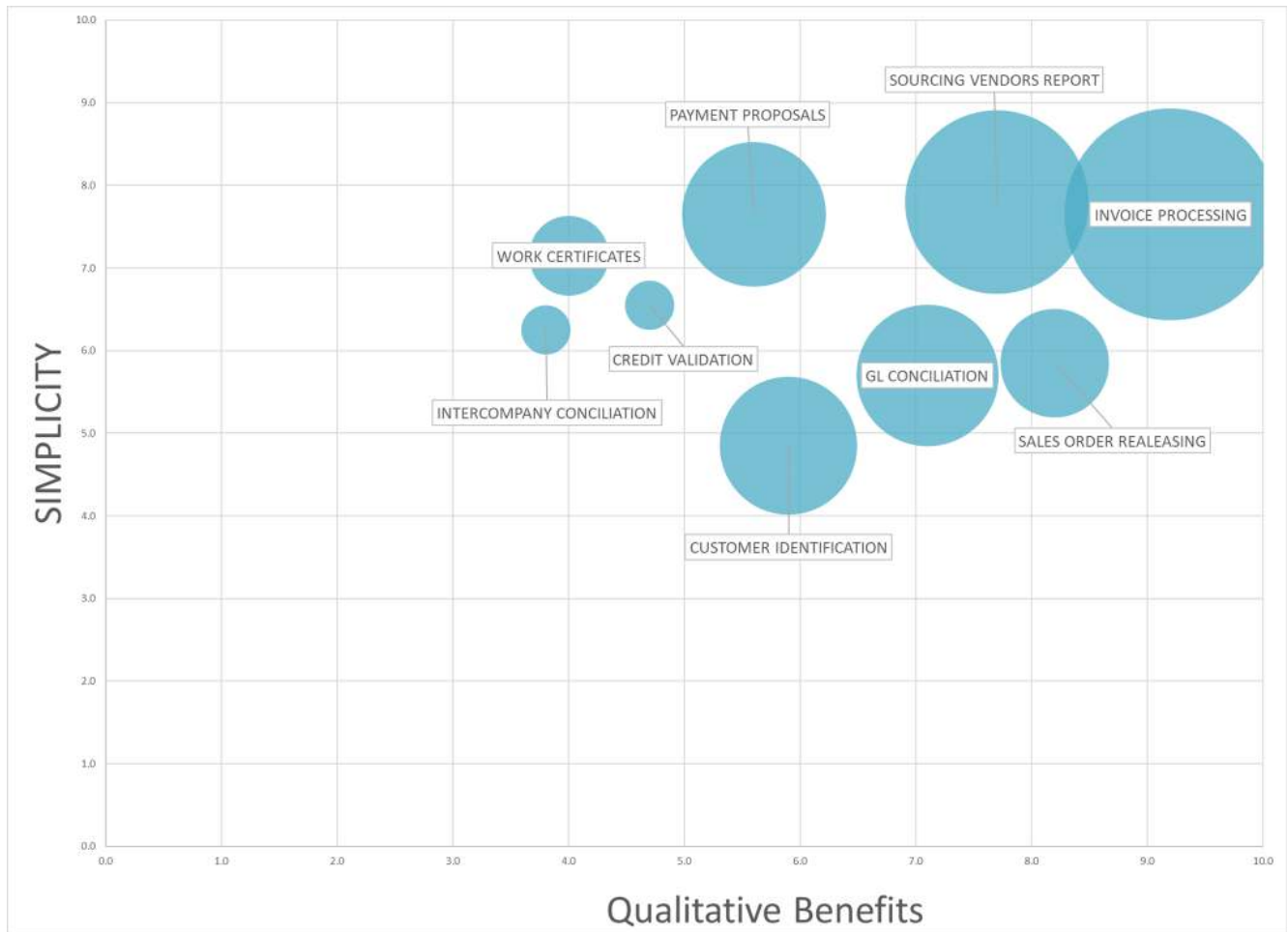


Figure 4: Strategic Automation Roadmap example

WHAT'S NEXT?

Roll up your sleeves and start to see the 'robots' in action!

According to Gartner, "[RPA Market Forecast to Grow at Double-Digit Rates Through 2024 Despite Economic Pressures from COVID-19](#)". The potential for RPA is boundless and early adopters have achieved significant cost and time savings through the successful implementation of a "digital workforce" (bots) to work along with humans. However, RPA cannot be "fired off all over the place" in an uncontrolled fashion. RPA programs are most successful when a structured framework with clear tangible benefits and correctly defined expectations are adopted and understood by business leaders. There is a critical need for a comprehensive approach that entails business strategies and multi-disciplinary governance between all relevant business functions, just as selecting the right process for RPA with an effective tool set is integral to the success of an RPA implementation.

Chazey Partners is highly experienced and well respected for our back-office transformation practice. Whether you are just thinking about RPA, in the middle of an Automation program implementation, or need On Demand development support, Chazey Partners can provide support and guidance for your organization's success. To learn how Chazey Partners Robotic Process Automation solution will help you identify opportunities for process improvement and automation at your organization, [download Chazey's RPA Guide.](#)

RPA/IA INSIGHTS

THE SSON GUIDE TO RPA IMPLEMENTATION

7 STEPS TO SUCCESSFULLY DEPLOYING RPA IN YOUR ENTERPRISE

➤ Many enterprises – if not most – lack a solid plan for implementing RPA. This guide is designed to help close this gap

[7 Steps to Successfully Deploying RPA in Your Organization](#)



Implementing a Best in-Class Center Of Excellence (CoE)

Intelligent Automation Week Digital Conference 2020

[RPA CoE Implementation - The WHAT, WHY and HOW](#)

CHOOSING THE RIGHT RPA VENDOR

Investing in the right RPA tool that matters to your automation journey!

[Choosing the RIGHT RPA Vendor for Your Automation Journey](#)

CHAZEY PARTNERS

Chazey Partners is a practitioner-led global management consulting and advisory services firm. We bring a unique blend of real-life, practical, hands-on experience, empowering our clients to strive for world-class excellence through Shared Services, Business Transformation, and Robotic Process Automation. We pride ourselves in helping businesses and public sector organizations achieve operational excellence in the delivery of mission-critical business services; including Finance, HR, IT, Procurement, Facilities Management, Customer Helpdesk, and many other support services. Chazey Partners has helped our clients implement successful service delivery solutions; in the US & Canada, Latin America, Europe, Middle East, Africa, Oceania, and Asia.

CHAZEYPARTNERS.COM