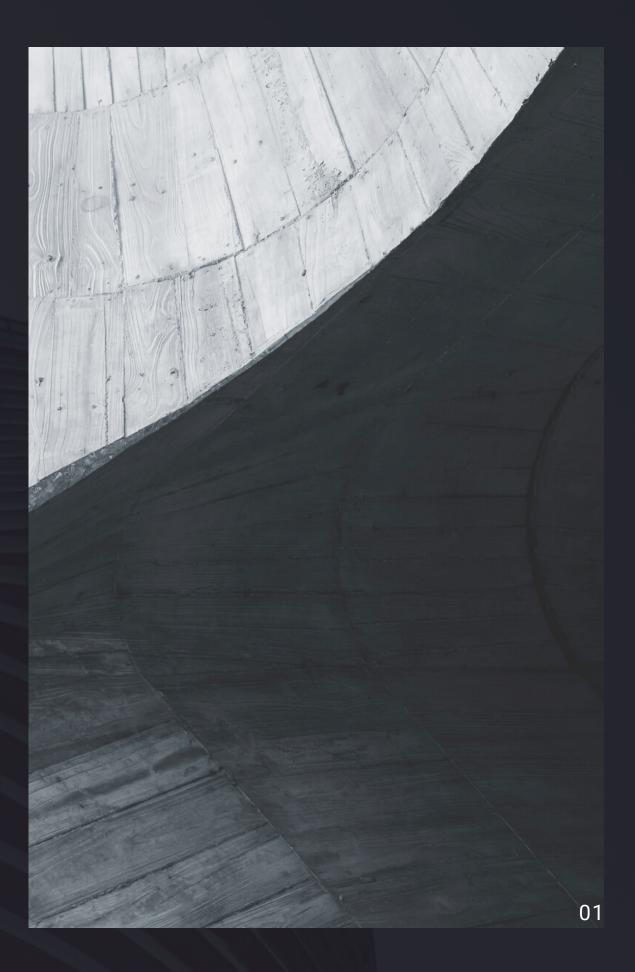# ROBOTIC PROCESS AUTOMATION

## YOUR IMPLEMENTATION PARTNER

Chazey Partners

# ABOUT US

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.
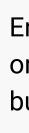
Chazey Partners has helped our clients implement successful service delivery solutions; in the US & Canada, Latin America, Europe, Middle East, Africa, Oceania, and Asia.

# OUR SERVICES



## Shared Services

End-to-End Solution from assessment to implementation including Business Case development, sophisticated Global Business Services (GBS) modeling, Technology Enablement and optimization



## Robotic Process Automation

End-to-End RPA implementation & consultation, enabling organizations to successfully digitize and optimize business processes through automation



## Business Transformation

Reshaping business operating models to provide breakthrough value through greater efficiency and data quality

"We are now entering the fourth Industrial revolution! The rise of Intelligent Automation, including Robotic Process Automation, is a big part of this new wave and will have a profound impact on the way work gets done. A hybrid workforce, made up of a mix of humans and bots, is inevitable. People and businesses will need to embrace the new economy and learn new skills to take advantage of this opportunity and to stay competitive."

- Phil Searle, CEO & Founder, Chazey Partners

# WHAT EXACTLY IS RPA?

## SHINEY ROBOTS? NOT REALLY!

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### AUTOMATION SOFTWARE

Software that is programmed to emulate and integrate the actions of a human to perform basic, repetitive tasks across applications and systems.

### DIGITAL WORKFORCE

A digital workforce (bots) that interpret, trigger responses, and communicate with other systems to perform a variety of repetitive tasks automatically.

### AUTOMATIC ADVANTAGES

Automatically performing tasks and executing processes, potentially at a fraction of the cost with a higher level of consistency & accuracy, freeing up humans to perform more value-added work.

# RPA BENEFITS

## Benefits of RPA

- Ease of use
- Ease of Implementation
- Doesn't Require New IT Infrastructure
- Flexibility and Simplicity
- Workforce Flexibility – "bots" can be utilized for multiple processes
- Workforce Availability – "bots" can execute 24/7
- Improved Data Quality, Accuracy and Consistency
- Low Cost / High Rate of Return (ROI)

## Benefits from RPA

- Reduced Cost
- Reduced Operational Risk
- Improved Employee Engagement
- Improved Customer Satisfaction
- Greater Efficiency
- Increased Productivity
- Greater Control and Risk Management

# RPA TRANSFORMATION APPROACH

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## Structured Framework

Like other transformations, business leaders should adopt a structured framework with clear, tangible benefits and correctly defined expectations before embarking on an RPA journey.

## Comprehensive Approach

There is a critical need for a comprehensive approach that entails business strategies and multi-disciplinary governance between business and IT functions.

Implementation should be part of a comprehensive strategy, with proper planning, engagement with key stakeholders, and clear management of change and resources – all supported by new operating models, technology, job roles and frameworks to function optimally.

# HOW WE CAN HELP YOU?

## END-TO-END RPA IMPLEMENTATION

**PILLAR 1**

Process Suitability,
Automation Strategy
Business Case

**PILLAR 2**

Proof of Concept

**PILLAR 3**

Center of Excellence
Implementation

**PILLAR 4**

Agile Methodology
for Bot Development

**PILLAR 5**

Managed Services

# Process Suitability, Automation Strategy, Business Case

### Process Suitability

- Evaluate the extent of activities suitable for automation.
- Document the end-to-end processes in sufficient detail to build an RPA pilot.
- Consider eliminating, simplifying and standardizing before, in lieu of or in addition to automating.
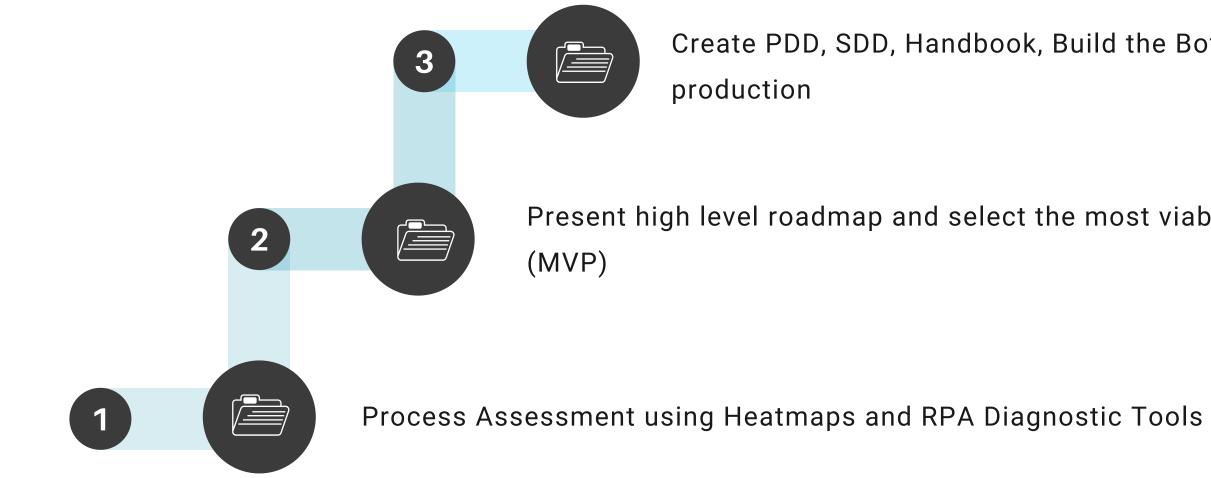
### Automation Strategy

- Automation strategy provides a blueprint for building and launching the Center of Excellence (CoE).
- It recommends next processes to automate, details suggested foundational training and outlines ongoing change management and communication efforts.

### Business Case

- Establish a robust business case.
- Define your RPA vision and objectives, quantify and estimate expected costs, savings, value, ROI and timelines.

# Design

- Defining the CoE operating model (centralized, hybrid, federated)
- Governance Model Level 4 documentation (intake, assessment, feedback, communication)
- Drafting assessment templates (viability, complexity)
- Developing methodology for financial viability (ROI)
- KPI´s & Service Level Agreements

# Implementation

- Building level 5 documentation (SOPs)
- Creating job descriptions for CoE
- Selecting CoE candidate
- Training for CoE team members (not development)
- Developing communication plan (CoE Launch)

# Chazey's Agile Methodology for Bots Development

## 1 Solution Definition(Discovery)

•Confirm scope •Define Solution Blueprint •Define Implementation Approach •Confirm methodology •Mobilize team •Solution Blueprint •Solution Strategy.•Implementation Approach & High-level Timeline •Project kick off •Review requirements & gaps •Confirm integration requirements and conversion strategy •Obtain sign-off of requirements and scope •Fit Gap Analysis Document•Requirements •Detailed Scope and Work Plan

## 2 Design and Build (Evolve)

•Create high level integration and conversation designs •Prepare features and user stories •Develop user stories •Configure application•Confirm Test Strategy •High level Integration and Conversion Designs •Configuration Design•Build objects and unit test •Test Strategy and Test Plan documents

## 3 Integrated Test

•Execute System Integration Testing•Execute User Acceptance Testing •Execute Performance Testing Fix defects •Confirmed and executed Test Scrips•Tested system and application•Test Closure Memo

## 4 Production, Post Production

•Train-the-Trainers •Prepare Production instance •Perform production data conversion •Execute Deployment/Go Live activities •Post go live support •Training Materials •Production instance ready •Converted Production data •Go Live Readiness checklists •Warranty support
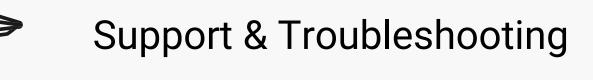
# PILLAR V
## Managed Services

Maintenance

Support & Troubleshooting

Enhancements & Updates

Monitoring

Dedicated Account Management

Analysis

# BEST PRACTICES

## TRANSFORM

Don't just mimic, look to improve, eliminate and simplify. Obvious, but smaller time-consuming tasks should be included to gain momentum

## 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 optimize the utilization 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.

# CASE STUDY

End-to-End Robotic Process Automation with
Dos Pinos

" The Chazey team served as a helping hand, teaching us how to walk step by step and telling us which is the right way to go. Their experience allowed us to incorporate the best practices from other shared services centers into Dos Pinos' business philosophy and methodology."
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Digna Moya Gonzalez, CFO, Dos Pinos

Dos Pinos is a Costa Rican cooperative producer of dairy, beverages, and candy products headquartered in Alajuela, Costa Rica. It has a brand portfolio of over 600 brands and its products are sold throughout Central America and the Caribbean.

In 2020, Chazey Partners was re-engaged to help build its RPA program, including defining the operating model, building a Center of Excellence (CoE) and providing training for program success. Chazey's end-to-end RPA implementation solution to Dos Pinos also includes an automation roadmap and supporting business case. The roadmap provides a blueprint for building and launching the CoE, recommends prioritization of next processes to automate, commences suggested foundational training and outlines ongoing change management and communication efforts.
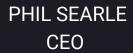
# SOME OF OUR VALUED CLIENTS

# LEADERSHIP

## MEET THE MANAGEMENT TEAM

Global Advisory & Expertise

PHIL SEARLE
CEO

CHUY MICHEL
GLOBAL RPA LEADER

JIM JAMESON
RPA DELIVERY MANAGER

ESTEBAN CARRIL
MD, LATAM

# WORK WITH US

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