

Robotic Process Automation

Use it to turbocharge your digital transformation

Executive Summary

Executives are leading their companies on digital transformations to increase competitive advantage—and they’re using an increasingly broad range of technologies to do so. Cloud-first, mobile-first platforms are popular choices. So are modern software engineering approaches and new tools for knowledge discovery, sharing, and collaboration.

Another is robotic process automation (RPA).

This Point of View from Blue Prism and CLOUDSYS, leaders in RPA technology and its implementation, explains why businesses worldwide are adopting RPA, how fast they’re doing so and what challenges they see to those implementations. It describes the technical and non-technical considerations in implementing RPA, explains the choices that businesses face, and discusses what to look for in RPA technology and an RPA systems integrator.



For many, a key part of their digital transformations

In new research from CLOUDSYS, 92% of IT decision makers surveyed around the globe acknowledged the importance of process automation to their digital transformations. Why? For companies that see the digital journey as a roadmap away from high costs and risks—as well as toward more productivity, scalability and innovation—robotic process automation is an integral part of the trip.

Most executives in our research cite productivity (73%) and cost reduction (65%) as the business drivers for RPA. Half cite customer service and satisfaction. Other key drivers are competitive differentiation, lower risk and the ability to refocus internal staff.

Automation, of course, is not new. Business process or workflow automation has been growing for the last decade or more. It now thrives on the desktop as a way to boost the speed and accuracy of workers as they participate in relatively stable, straightforward processes.

RPA is something more. It’s the use of software to mimic the actions a worker would perform on a PC—but at scale. The business processes it automates are highly repetitive, rules-based, and use template-based data. They may also be high-volume or complex. With RPA, businesses can create digital workforces that execute repetitive process steps faster, more accurately and more cost-effectively than can traditional workers.

Those virtual workers or robots interact with systems in the same ways that traditional workers do, so RPA can be implemented without the need for complex system integration. RPA is a potential solution for repetitive manual tasks in virtually any industry. Businesses also find that RPA can be flexible enough to grow as they grow. They can adopt it initially for a narrow set of functions and expand its usefulness to more use cases and more departments over time.

Allocating resources better at lower cost

RPA isn't necessarily about reducing headcount but rather about allocating resources better, at lower cost. It's about freeing-up people to do the higher-order strategizing and problem-solving that they do best. It's about giving hours back to the business to be reinvested in higher productivity, the development of new products and services or entirely new lines of business. For example, sudden surges in demand that

previously forced mid- and upper-level managers to staff the helpdesk or order desk can now be handled by robots, leaving managers to their more strategic functions.

Businesses can use RPA as they would their outsourcing resources, scaling the robotic workforce up or down as needed. But with RPA—unlike outsourcers—businesses can be sure that the company-specific expertise they need is always available to meet unexpected demand. That means they can address sudden changes in demand more smoothly and flexibly, with less risk.

For example, a telecom provider can face a major surge in demand when a new phone is released by a popular manufacturer—but how popular, exactly, will the new phone be? No one can know for sure. Getting staffing levels wrong can mean being unable to process orders promptly, losing some orders entirely—or paying for unneeded staff. That problem goes

away with RPA. Virtual workers can be deployed to the cloud instantly and redeployed or scaled back in a very dynamic way when not needed.

Executives increasingly understand this and are putting RPA to use in their businesses. In our research, 19% of global IT decision makers said they now use RPA and another 56% expect to adopt it within three years. But with the technology here today, why aren't more companies already using RPA and why are others waiting perhaps three years or more to do so?

Many say they need answers to questions about security and change management. More than four in ten cite cost factors. Almost as many say they lack in-house skill sets. To address their concerns and compensate for the skills gap, just over half (51%) plan to turn to service providers to assist with implementation, with 11% reporting they'll use managed service providers as much as possible.

By the numbers: The RPA scenario

Here's how Blue Prism, the industry-leading RPA technology vendor, does RPA:



Business users employ an intuitive interface to define specific processes for software robots to learn.



The robots execute almost any human task that's repetitive and involves objective decision-making—and do so faster and more accurately than traditional workers.



The centrally-controlled robots are instantly scaled or repurposed to meet business needs.



They work across platforms including mainframes, Windows, Linux, and Web UIs, and with most applications.



Every step of every process is recorded and logged, ensuring compliance. Data can be exported for analysis.

Two overarching principles

No single approach to RPA will be optimal for every business. Nevertheless, large enterprises adopting RPA will do well to consider two overarching principles:

RPA should be a business/IT partnership with clearly defined roles.

The business should define the automation strategy. This includes managing demand, determining what is automated and monitoring the benefit. Allowing business to own the strategy is the best way to guarantee that RPA truly meets business needs.

But while the business should own the automation strategy, IT should own the platform. IT is best positioned to successfully provision, govern, and secure technology. With security a key concern for executives contemplating RPA, IT ownership—rather than shadow-IT business ownership—is the best guarantor of security for sensitive data within mission-critical operations. IT also plays a major role beyond provisioning, governance and security. It is responsible for designing, implementing, and optimizing a scalable technical architecture, suitable for a cloud-first future.

Yet another IT responsibility is to provide the systems integration capabilities to enable complementary technologies. These tools, applications and platforms extend the reach of automation by leveraging capabilities including machine learning, analytics or sentiment analysis, natural language processing, and Interactive Voice Response (IVR) integration. Finally, IT provides the support model for the automation capability. Typically, this can involve managing and addressing technical issues and providing guidance on the delivery methodology and development best practice.

Enterprises deploying RPA should go slow—and fast. Enterprises can reconcile that seemingly contradictory advice by adopting parallel tracks for RPA. The fast track is a short-term tactical approach that looks to create a few quick wins to demonstrate RPA's value to the organization, to address concerns and build buy-in and to help make RPA part of the fabric of the organization.

Meanwhile, the more strategic and longer-term track builds a solid foundation for continuing success with RPA throughout the enterprise. A new operating model and technology architecture should be in place before large-scale adoption of RPA, for example. The right processes need to be prioritized, the right support made available, and the right demand-pipeline management implemented.

Two key elements to this strategic track are **change management** and the creation of a **center of excellence**.

Doing change management right

RPA is a highly sophisticated technology, so it's perhaps ironic that an essential part of its successful implementation is the decidedly non-technical issue of cultural change management.

People, not robots, remain the essential workforce in the enterprise and it's important to the success of RPA that they understand that. RPA implementation needs both top-down sponsorship from the company's leaders, as well as bottom-up support from the workers whose jobs will change as a result. How well the enterprise manages cultural issues and change management will go a long way toward determining how much of that bottom-up support it will get.

Challenge:

A global bank spent too much time and money responding to third-party audit-letter requests.

Solution:

A Blue Prism/CLOUDSYS RPA solution reviews applications, retrieves data, applies logic, creates responses and identifies exceptions for manual handling.

Results:

60% of FTEs reallocated to higher-level tasks
40% reduction in handling time
100% accuracy achieved

Challenge:

Agents at a global telecom had to manually index more than 150 orders per day across multiple applications.

Solution:

An RPA solution that works across SharePoint, SAP and Excel with all business rules and exceptions handled automatically.

Results:

95% reduction in orders requiring human handling
100% accuracy achieved

Managing change requires a proactive strategy and, particularly, early engagement with HR. Publicizing early wins can help to show how RPA enables the enterprise to redirect traditional workers to more value-added roles within the enterprise. Those who fear large-scale layoffs can be reassured that changes in headcount will be handled primarily through attrition, reduction in offshore or other ancillary resources, or both.

Creating a center of excellence

The enterprise looking to adopt RPA would do well to consider a center of excellence (COE) as a central location from which to make RPA implementation resources available to the enterprise. A COE ensures consistent, effective, secure, and cost effective implementation, consistent with governance requirements.

The COE is where the business/IT partnership takes place. The COE becomes the focus for RPA infrastructure, change management, security and scalability, support and execution, and IT governance.

Here are some of the elements that should be included in a COE for RPA:

Operational performance and productivity. The COE should host the technologies, resources and best practices to help ensure that the underlying RPA architecture is optimized for performance and the specific needs of the enterprise.

Ease of development and maintenance. Speed and ease of development and maintenance aren't just issues for initial phases, but also for the subsequent implementation of RPA at scale. Getting this right accelerates adoption and expansion. It ensures a lean operation and competitive Total Cost of Ownership, which contribute to RPA's success as a strategic platform.

Methodology and implementation.

The enterprise needs a repeatable and industrialized quality standard for implementing and using RPA. Such a standard helps drive adoption and provides a clearly defined path to self-sufficiency and high-quality outcomes.

Scalability and resilience. For RPA to make an optimal contribution to the enterprise, it needs to be both scalable and resilient. That requires an ability to allocate and manage workloads, communicate among digital workers, ensure business continuity, and respond to (and recover from) interruptions while executing process automations.

Security, governance, risk and control. These factors are tightly interdependent. RPA should be implemented with controls for 100% policy compliance with data and access security protocols. For most enterprises, these controls need the flexibility to operate both in a lights-out environment with minimal human support as well as in scenarios that involve human interaction.

Other considerations include where the COE should be located and how it should be staffed. Businesses can build and maintain their COEs internally, have RPA systems integrators host them, or use a combination of internal and external resources.

The business is not locked into a single COE configuration. It might, for example, start quickly with an integrator-hosted COE, then migrate gradually to a partially or fully internal model as it acquires the knowledge and staff to do so. In any shared-responsibility model, the relationship between the business and the partner is crucial to the COE's success.

Challenge:

A UK-based B2B energy company wanted to increase the speed and agility of processes that were low-volume and complex.

Solution:

A Blue Prism RPA solution used 10 robots to automate 17 processes covering invoicing, reporting, contracts and compliance.

Results:

60% reduction in processing time
8% increase in productivity
Avoided hiring 40 additional FTE Equivalents

What to look for in an RPA systems integrator

For a successful RPA implementation, the business needs an RPA systems integrator with experience—the right type of experience. Here's what to look for:

In-depth expertise with RPA technology. RPA can be hard to do right—so a business contemplating RPA needs a sophisticated, experienced systems integrator that's well-versed in the nuances of the technology and can deliver a robust, secure solution that actually boosts productivity and reduces costs. CLOUDSYS, for example, has more than 1,250 RPA experts, 4,200 business excellence and automation experts, a highly scalable automation factory, its own school for automation and more than 100 developers certified in RPA tools. The company has implemented more than 6,000 successful automations for more than 350 RPA clients.

A strong relationship with the RPA technology vendor. Beyond its own RPA expertise, the systems integrator should have a strong relationship with the RPA technology vendor, tools that are quality-checked by that vendor, and vendor-validated RPA methodologies.

Mastery of change management. With change management so important to the success of an RPA implementation, the systems integrator needs to be able to put it front and center. The integrator should be well-steeped in the methodology. It needs to understand how to analyze the jobs affected by RPA, including how to account for both formal and informal job functions, how to migrate from flexible to rigid processes, how to set expectations for results that may take months to become evident and how to address legal, social, and other RPA implications.

Expertise in governance. Governance issues generally should be addressed even before technology issues. The systems integrator needs to know this—and how address them successfully. That includes issues of business case validation, planning, due diligence, change implementation and more.



RPA tools based on Microsoft technologies. Most enterprises run in whole or in part on Microsoft technologies, so it's important that the RPA solution run on them, too. That enables faster, easier, fuller and more reliable integration between the RPA platform and the enterprise. Some businesses may prefer or require on-premises solutions; others may prefer cloud or hybrid solutions. For the latter group, Microsoft Azure would be a preferred choice. Your RPA systems integrator should have this Microsoft expertise.

So you want to implement RPA...

RPA can be an important part of your digital transformation agenda, enabling staff to accelerate innovation while strengthening the core of IT operations. For example, early adopters of RPA are now using their investment in the technology to become both more employee-centric and more customer-centric.

If you're looking for essential guidance to implement RPA in your enterprise, here are some first steps to consider:

Consider your choices for RPA technology and an RPA systems integrator. Pick the partnerships that fit your existing environment, business needs, competitive environment, workforce and resources.

Think about creating a Center of Excellence. Alone or with your RPA systems integrator, the COE can determine the success of your RPA implementation for years to come.

Think about the right proof-of-value for you. Do due diligence on where RPA could have the greatest impact in your enterprise. Pick a process that will provide great ROI and demonstrate the full capabilities of RPA. A simple, high-volume process, such as submitting and processing expenses or claims, is likely to show early success. Conduct a production proof-of-value with which you can confirm the ROI, educate team members, and verify the architecture's performance, scalability and reusability.

Tangible business outcomes

Our aim is to help businesses get the most from their RPA projects, bringing them the best of CLOUDSYS and BluePrism to deliver an end-to-end solution that supports tangible business outcomes.

For more information, contact:

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About

CLOUDSYS is the leading provider of innovative digital and cloud services, business solutions and design-led experiences delivered through the power of people. Our professionals bring bold, fresh thinking combined with technology, business and industry expertise to help fuel transformation and growth for our clients and their customers. CLOUDSYS brings clients the best thinking through a collaborative culture that honors diversity and reflects the communities in which we operate.

About BluePrism

Blue Prism Robotic Process Automation (RPA) software delivers the world's most successful digital workforce, which operates within the most demanding enterprise administrative environments to automate high-risk, manual, rules-based and repetitive tasks and radically improves agility, efficiency, accuracy and compliance. Blue Prism provides a scalable and robust execution platform for best-of-breed AI and cognitive technologies and has emerged as the trusted and secure RPA platform for the digital enterprise. Blue Prism's RPA software has executed more than one billion transactions for enterprises including Aegon, BNY Mellon, Commerzbank, IBM, ING, Maersk, Nokia, Nordea, Procter & Gamble, Raiffeisen Bank, Siemens, Westpac and Zurich.