Rapid Process Transformation Handbook

Enriching Employee Experience through Automation-Based Transformation

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Intro to the Handbook

Employee Experience

Robotic Process Automation (RPA) is taking hold across the government, with many agencies successfully deploying the software to automate business processes. As RPA programs have matured, it has become clear that **the technology has the potential to transform both operations and employee experience.**

Burdensome, inefficient tasks create additional workload for employees, straining the achievement of mission outcomes and negatively impacting employee experience. RPA holds great promise for empowering employees to perform mission critical and high-value tasks, through low-code, reliable automation.

This Rapid Process Transformation (RPT) Handbook is intended to bridge the gap between an agency wanting to automate tasks and improve employee experience, and determining how to do it most effectively. This Handbook will enable agencies to quickly distill manual business processes into opportunities for automation, including optimization and standardization.

Our approach is holistic, and considers more than just understanding the technology. The Playbook covers building a change coalition (who); selecting business process candidates (what); and optimization and deployment strategies (how).

Thank you to the management committee and our COP members for their input and support in creating this critical resource for federal RPA programs. Together, we can leverage automation-based transformation to dramatically improve Federal sector employee experience.

- Gerard

Gerard Badorrek
GSA CFO
Federal RPA CoP Sponsor

Federal RPA COP Focus Areas

The Federal RPA COP focuses on five capability areas that are base requirements for a successful RPA program. This document is beneficial in improving capability areas 1, 2, and 5 — demand generation, process optimization, and program management. The RPT methodologies discussed herein are proven strategies for supercharging demand generation, conducting improvement and reengineering work, and effectively managing RPA projects from idea to deployment.

Demand Generation
The processes associated with spreading awareness, building organizational enthusiasm, and identifying and selecting the right automation candidates.

Process Optimization
The processes associated with aligning business processes to valued outcomes, then optimizing those processes through elimination, optimization, and automation.

Automation Development
The processes associated with taking an automation design and getting it built, tested, deployed, and efficiently managed.

Technology Management
The processes associated with selecting an automation technology, achieving required IT approvals, and deploying compliant security, credentialing, and privacy strategies.

Program Design & Agile Management
The processes associated with managing an RPA program including COE design, automation factory design, assigning roles and responsibilities, training, and performance reporting.

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Reading this RPT Handbook

The Rapid Process Transformation (RPT) Handbook provides pragmatic guidance for federal programs looking to improve operations through automation. The handbook is formatted to follow a typical automation project through its lifecycle, from ideation to deployment. It provides best practices and lessons learned from mature federal RPA programs that have successfully deployed hundreds of impactful automations.

AUTOMATION PROJECT LIFECYCLE

IDEATION

COP Practice Area

1 Demand Generation

Building a Change Coalition	Opportunity Identification	Opportunity Validation
Assembling the right team to drive enduring operational change and improvement through RPA deployment	Identifying high-value RPA opportunities through effective engagement of staff, process SMEs, customers, and leadership	Establishing a streamlined process for assessing RPA opportunities and determining alignment with valued outcomes and office or agency strategies

SOLUTIONING

COP Practice Area

2 Process Optimization

Process and Value Mapping	Technology Assessment and Selection	Automation Design
Assessing business processes against value outcomes. Re-engineering and defining into inputs, actions, outputs, and systems to determine value streams and focus areas	Determining the right automation solution for identified business challenges, balancing capabilities, cost, and feasibility	Defining the overall automation architecture to ensure a connected, effective, measurable RPT deployment

DEPLOYMENT

COP Practice Area

5 Agile Program Management

Definition and Scoping	POAM Documentation and Scheduling	Accountability, Metrics, and Dashboarding
Detailing the goals, outcomes, and milestones for the project	Creating formal POAM documentation and a deployment schedule for automation activities	Deploying metrics and dashboards to monitor progress, measure operational performance, and facilitate accountability

1

Ideation

Identifying high-impact automation opportunities to solve known and emerging business challenges.

Building a Change Coalition

Goal: Establish a broad base of leadership and staff support within an organization to identify, define, and deploy impactful automations.

RPA projects require the input, expertise, and commitment of multiple stakeholder groups including process subject-matter experts, systems owners, program managers, automation developers, oversight organizations, and executive leadership. For RPT to succeed within an agency, the automation program needs to ensure all of these actors are reading from the same script, and not working as separate players.

Time spent coordinating across offices, scheduling leadership briefings, and building consensus all strain a program's ability to deliver results rapidly. By attacking these tasks as an army of change champions, rather than a single point of RPA management, complexities tend to dissipate, and the pace of change accelerates.

Establishing an effective change coalition is a critical element of all three focus areas covered in this handbook — demand generation, process optimization, and RPA program management. Members of the coalition can leverage unique insights into process performance, requirements, policies, and standard operating procedures, making them invaluable at key tasks like opportunity identification, process reengineering, and automation deployment.

Picking the Right Team

Ideal initiative champions will favor change and focus on continuously improving business processes. Coalition members should have visibility across business functions, with representation from systems, process, and policy subject-matter experts (SMEs).

The formalizing of the change champion function is a common practice among large federal automation programs via a customer or client manager role.

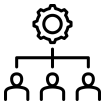
Setting Aggressive Goals

When forming the change coalition, it is important to have a clear understanding of what success looks like, with defined goals for all activities.

RPT leaders must assess the individual priorities, operating environments and constraints at their agency to determine appropriate goals. Examples include;

Outcome Goal: Hours of annualized capacity created for the organization
Outcome Goal: Hours of annualized capacity redeployed to strategic priorities
Output Goal: Number of RPT projects deployed

Using the Right Structure



Leveraging a community of practice (COP) structure is a common approach to creating a change coalition.

A COP brings together technical experts, leaders, and staff that perform a common function. A COP is chartered to accomplish certain outcomes, whereas a Community of Interest (COI) is often created for knowledge sharing within an agency.

In the RPT context, COPs are helpful organizing mechanisms to incorporate a broad group of SMEs to facilitate timely and effective opportunity identification, improvement, and automation.

CRITICAL SUCCESS FACTORS

Engaged SMEs

COPs do not require a huge time commitment, but do require a passion for improvement. A small group of engaged SMEs can create outsized momentum for change.

Engaged Executives

RPT project implementation inevitably results in some delays. Engaged executives are needed to push past these hurdles and provide ongoing momentum for the effort.

COP RESPONSIBILITIES

Analysis and vetting of improvement opportunities

Project design, scoping, and implementation planning

Project implementation and change management

Ongoing performance measurement and reporting

Opportunity Identification

SOURCES OF AUTOMATION OPPORTUNITIES

Goal: Identify business challenges that can serve as good candidates for deploying innovative automation solutions.

1 Staff Survey

2 Known Business Challenge

3 Emerging Business Challenge

A Should We Do a Staff Survey?

Pros: 1) Increases staff engagement. 2) Raises new and fresh ideas. 3) Creates team ownership of the RPT Initiative through deployment.

Cons: 1) Adds administrative burden. 2) Increases project duration 3) Creates expectation of follow through.

B What does a staff survey contain?

Appendix B includes a RPT staff survey leveraged for several successful deployments.

C How can we optimize the survey?

To improve the staff's ability to identify challenges suitable for automation, the organization can conduct RPA Awareness training in advance of the survey. This training describes RPA capabilities, use cases, and common applications.

D Interpreting Staff Responses

An initial download of staff responses will lead to great insight into operational challenges. Some additional interpretation and discovery may be required to fully understand identified process improvement opportunities.

Initial responses should be quickly reviewed and divided into two categories - complete ideas and those that require additional discovery. The test should simply be *Does the assembled SME team understand the idea fully, to the point it can be vetted and analyzed?* A full discovery workshop is often not required for matters of simple clarification.

Voice of the Customer Analysis

What: Soliciting customer feedback through formal and informal channels provides program executives an understanding of existing business challenges and opportunities for automation.

How: Voice of the customer analysis can be obtained through surveys, interviews, focus groups, and quantitative data review.

Strategy: Leverage organizational process SMEs to help translate customer feedback into actionable requirements. This distillation from high level observation to distinct business challenge creates the groundwork for impactful automations.

Voice of the Business Analysis

What: The concept of voice of the business analysis refers to the requirements of executive leadership and oversight stakeholders.

How: Voice of the business analysis is most often obtained via executive mandate, requirements, policies, and standards.

Strategy: Leverage organizational process SMEs to translate executive mandates into distinct automation opportunities. This includes both stated mission requirements, as well as back office functions that enable mission achievement.

Operational Metrics and Dashboards

Operational and strategic reviews can convey performance trends and data analytics that reflect potential business challenges.

Oversight Reports and Findings

Internal and external audits can identify potential business challenges, compliance risks, and process bottlenecks. Some audit reports are able to identify root causes, whereas others just provide macro-level findings.

Program Evaluations

Program evaluations can offer guidance on organizational performance that merits additional discovery and automation solutioning.

Executive Management Mandates

Executive managers often identify performance anomalies that require investigation, evaluation, and greater insights. Automation is an important tool in resolving these challenges.

Opportunity Identification

DISTILLING AUTOMATION OPPORTUNITIES THROUGH DISCOVERY WORKSHOPS

Sources of Business Challenges

- **Staff Opportunity Surveys**
- **Voice of the Customer Analysis**
- **Operational Metrics and Dashboards**
- **Voice of the Business Analysis**
- **Oversight Reports and Findings**

Using Discovery Workshops to Identify Automation Opportunities

Discovery Workshops

Cross-Functional Team Engaged in Collaborative Ideation

The rigor and structure of the discovery workshop depend on the complexity of the known/unknown business challenge. Even for complex business challenges, discovery workshops should take no more than two weeks to plan and finish.

Figure 1 below lays out a proposed approach for conducting an effective process discovery workshop to support the RPT Initiative.

Goal: Rapid ideation and distillation of business challenges into automation opportunities.

FIGURE 1: DISCOVERY WORKSHOP APPROACH

A Assemble the Right Team of Experts

The Process Discovery Workshop should include a team of SMEs with knowledge across the business challenge or business process (depending on scope). Many processes conducted by federal agencies potentially involve thousands of employees — an effective workshop only requires 8 –10 SMEs with cross-functional expertise.

B Gather Artifacts and Documentation

Gather and distribute process artifacts — including standards, policies, performance metrics, and strategy documents — before the discovery workshop.

C Assess the Challenge

Using a simple organizing tool like a performance logic model (see Toolkit Appendix C) use the workshop to identify organizational value propositions. Then identify the inputs, processes, outputs, and outcomes associated with the business function/value outcomes. Where is the current performance challenge arising and what are the downstream impacts?

D Assess Potential Solutions

Leveraging the initial discovery workshop outputs and assembled process artifacts, the SME team should create concise definitions of the business challenge.

ENGAGE THE COP SMEs

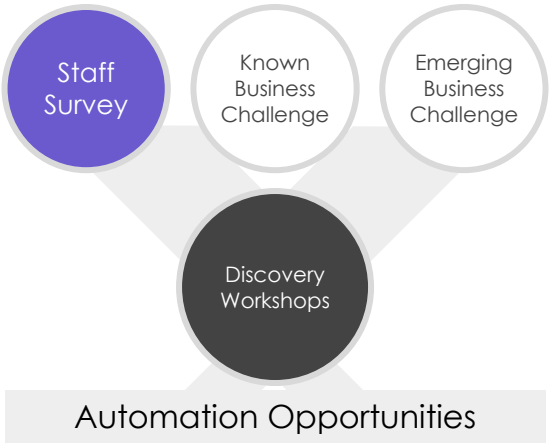
The COP should coordinate discovery workshops, including identification of SMEs, facilitation, and action tracking management.

Opportunity Validation

Goal: Rapidly assess the validity of initial automation opportunities before engaging in process improvement and optimization.

ENGAGE THE COP SMEs

The COP should leverage its cross-functional expertise to validate opportunities and decide which automation projects proceed to optimization.



CHECK 1: OPPORTUNITY VALIDITY

CHECK 2: FEASIBILITY, IMPACT, AND STRATEGIC ALIGNMENT

Staff surveys and process discovery workshops can yield many automation opportunities. Automation programs should apply consistent and comprehensive standards to decide which projects receive approval for process optimization and reengineering.

Validate on a per opportunity basis as part of a formal intake process for the automation program, or as a batch if the opportunities result from a broad survey or other feedback collection mechanism. Consider validity, feasibility, impact, and strategic alignment when assessing potential automations.

- Create a list of initial automation opportunities, and perhaps ancillary elimination or optimization opportunities.
- Share the automation opportunities list with the communities of practice (COP) to complete initial vetting and analysis.
- Have the COP complete an initial validity check that ends in a go/no-go decision. Further analysis of feasibility and impact will then provide leadership with the information necessary to prioritize and approve potential RPT projects for implementation.

CHECK 1: OPPORTUNITY VALIDITY

VALIDITY CHECK

Does the automation opportunity address a real business challenge or enable new capacity, capability, or performance levels?

Is the automation opportunity data-driven? What evidence supports implementation?

Does the automation opportunity need to be refined or altered to increase efficiency, quality, effectiveness, or compliance?

Is there a logical connection between the recommended automation and the purported benefit?

Does the opportunity meet all specified requirements for automation development (e.g., minimum hours of capacity created)?

The output of the project validity analysis is a go or no-go decision. Assess approved projects for feasibility, impact, and strategic alignment.

Opportunity Validation

CHECK 2: FEASIBILITY, IMPACT, AND STRATEGIC ALIGNMENT

FEASIBILITY

What are the resource requirements for deploying the identified automation opportunity (e.g., tools, technology, people)?

Are there external factors — like policies, standards, or oversight stakeholders — that would preclude the automation opportunity?

What is the proposed scope and timeline for implementing the automation opportunity? Is the timeline too long to be an effective solution?

Is the proposed automation project possible? Do statutory or other policy requirements require the activity be performed to a certain standard?

Is there an automation solution with the technical capabilities to deploy the proposed improvement?

IMPACT

Would the automation opportunity fully rectify the identified business challenge?

Would the automation opportunity provide a long-term solution or short-term fix?

Does the impact of the automation opportunity justify the resource allocation required? If resources are limited, what initiatives will the agency not be able to pursue?

Are there risks to implementing this solution? How likely is a successful deployment?

STRATEGIC ALIGNMENT

Will the automation opportunity meaningfully impact or contribute to achieving the agency/office's strategic priorities?

Will the automation opportunity meaningfully impact or contribute to achieving the agency/office's operational priorities?

What strategic initiatives will the organization not be able to complete in order to prioritize this automation opportunity?

Validation Considerations

The automation program leads should assess the following at a macro level:

- A robust portfolio of automation opportunities across critical functions.
- An opportunities list with a mix of quick wins, projects that can be accomplished within a fiscal year, and long-term solutions. RPT initiatives thrive off of quick wins to build momentum.
- Detailed project descriptions and a sufficient degree of analysis (feasibility and impact) to inform executive decision making on which projects should be approved.

Opportunity Validation

USING A PRIORITIZATION MATRIX TO SUMMARIZE VALIDATION ANALYSIS

Once an automation opportunity has been assessed on the basis of impact, feasibility, and strategic alignment, consolidate these inputs using a prioritization matrix. The matrix simply records scores on a 1, 3, 7, 9 scale for each of the evaluation factors. It then multiplies the score by the category weight, providing the program with a quantitative means of prioritizing automation opportunities. For the Purchase Card Request Automation, the ratings were 7 for impact, 9 for feasibility, and 1 for strategic alignment. Multiplying each rating by the corresponding category weight gives a total score of 42.

The Prioritization Matrix also helps gain leadership buy-in. It provides a comprehensive review of all automation opportunities using a consistent and standard methodology.

Figure 2: Sample Prioritization Matrix

Project ID	Improvement Opportunity	Impact	Feasibility	Strategic Alignment	Total Score
		Weight 1	Weight 2	Weight 3	
A-21-1	Contractor Responsibility Determination Automation	X (1,3,7,9 rating score * weight)	X (1,3,7,9 rating score * weight)	X (1,3,7,9 rating score * weight)	X Sum
A-21-2	Purchase Card Request Automation	3	18	21	42
A-21-3	Funds Certification Automation	7	14	3	24

RPT Toolkit

See Appendix

Below is a list of resources found in the RPT Toolkit that are relevant to the Ideation phase.

1. Sample Community of Practice Charter
2. Staff Survey
3. Performance Logic Model
4. Sample Vetted Projects List
5. Leadership Prioritization Matrix
6. Feasibility and Impact Decision Matrix

2

Solutioning

Designing automations that improve business processes and resolve complex operational challenges.

Process and Value Mapping

Goal: Do collaborative mapping exercises to understand high-level automation technical requirements such as where within the process the automation will be deployed, and its intended function.

ENGAGE THE COP SMEs

COP SMEs provide invaluable process and operational knowledge to help the automation program in completing a comprehensive and relevant mapping exercise.

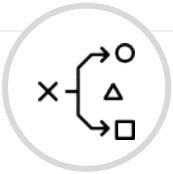
The second phase in the RPA program life cycle is solutioning, or translating the automation opportunity into a design strategy/architecture for successful deployment. The critical steps in the solutioning phase are assessing current business processes against defined value outcomes; re-engineering, as needed; and establishing a firm depiction of the business process by mapping, applying quantitative data, determining an improvement strategy, developing an automation approach, and identifying the right automation technology.

Process mapping should be an agile exercise addressing current state, new, or re-engineered processes. At a minimum, process and value mapping should capture process steps, handoffs, involved stakeholders, and system activities. The map should be complex enough to capture the automation points, but generally high level. Before automations are developed, more detailed process design documents (PDDs) are often created to convey specific automation functions.

GUIDANCE FOR CREATING EFFECTIVE PROCESS / VALUE MAPS

Facilitate a Collaborative Mapping Session

Ensure representation from across the functional area(s) to foster fruitful discussion of value alignment and rapid mapping, as well as identification of process variances.



Keep the Process Map Consistent and Simple

Improvement methodologies offer various approaches to current state mapping. The best approach is to keep things simple and leverage a consistent set of symbols.

Incorporate Quantitative Performance Data

Incorporate quantitative data where possible to fully understand the scope and what happens at each step in the process, the current bottlenecks, and the current constraints.

Identify Critical Systems Interfaces

Identify interfaces with systems and technology to understand whether they drive efficiency or inefficiency in the overarching business process.

Determine What Drives Value for the Organization

Align desired process outcomes with process steps. What drives value for customers and stakeholders? How can optimization improve those steps?

Promote Cross-Functional Standardization

Federal business processes performed across multiple organizations can develop non-standard practices and approaches that drive inefficiency and exacerbate the challenge of automation. To the extent possible, standardization should occur before automation to increase the value of the automation and avoid further promulgation of non-standard practices.

Process and Value Mapping

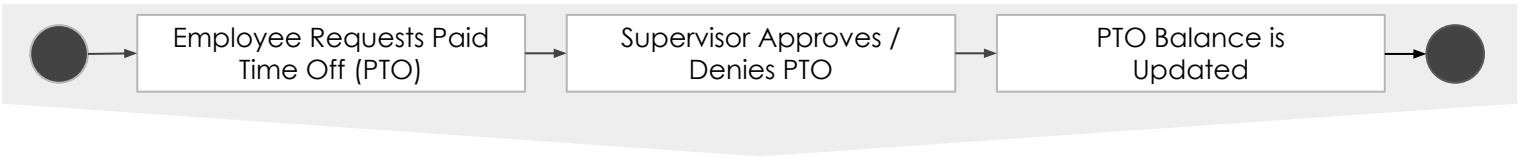
In an effectively facilitated process and value mapping exercise, participants will be challenged to incrementally dive into further detail on how the process is currently performed. At the same time, they can create consensus across SME groups that what is being captured is authoritative and complete. Starting at a high level, the team should map "Level 0" which simply includes key process steps. A Level 1 map incorporates more detail on process actors, systems, and handoffs. Level 2 (or even Level 3) maps may be required depending on the breadth and complexity of the business process. Generally, Level 1 or 2 is sufficient for understanding what steps could and should be automated.

Once the process is defined at Level 1 detail, the mapping exercise should incorporate additional layers of analysis including qualitative/quantitative data and value streams. The most appropriate data will often be process specific, but generally includes information on workflow, capacity, and performance. Value stream analysis looks at what factors are most critical to driving desired outcomes (e.g., customer satisfaction, compliance), and then highlights the steps most closely tied to those outcomes. Those steps are generally considered the most critical to ensuring quality and efficiency.

A high-level, notional example of the typical progression of a mapping exercise is included below.

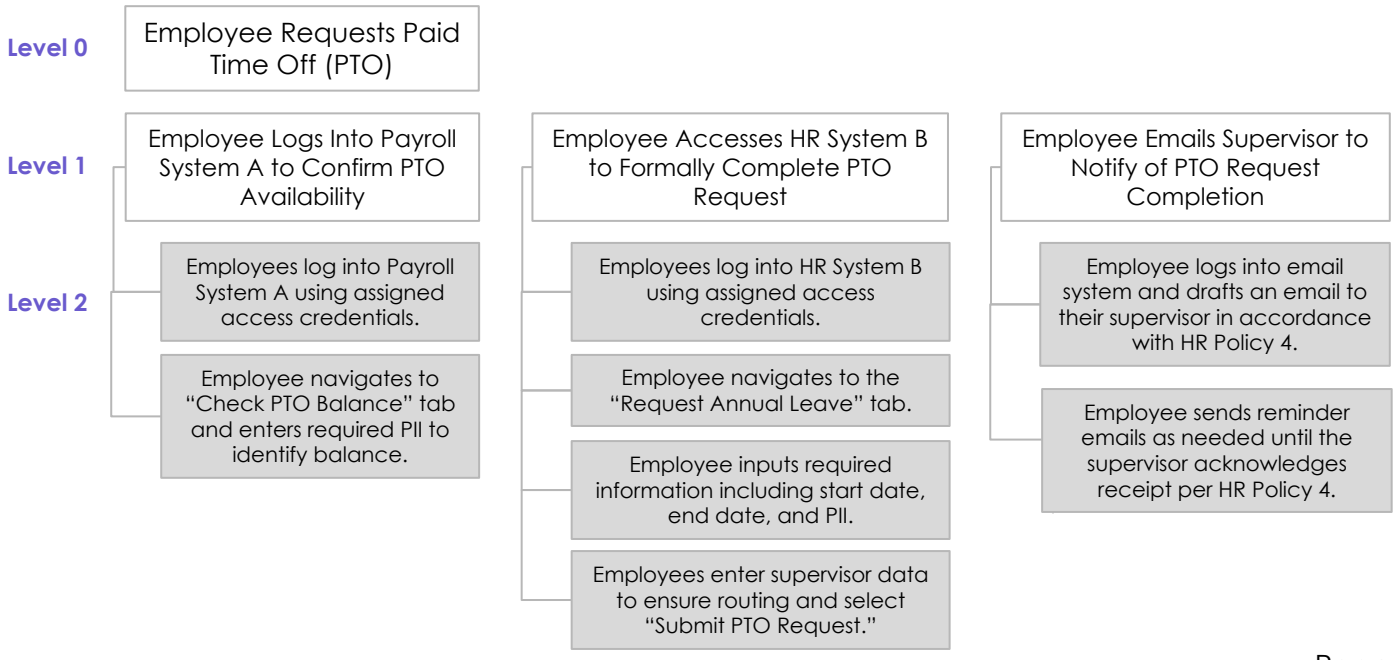
STEP A:
Define the Process at a High Level

Example Automation Opportunity: The PTO Request at Agency X is Inefficient



STEP B:
Selective Deep Dive into Process Steps

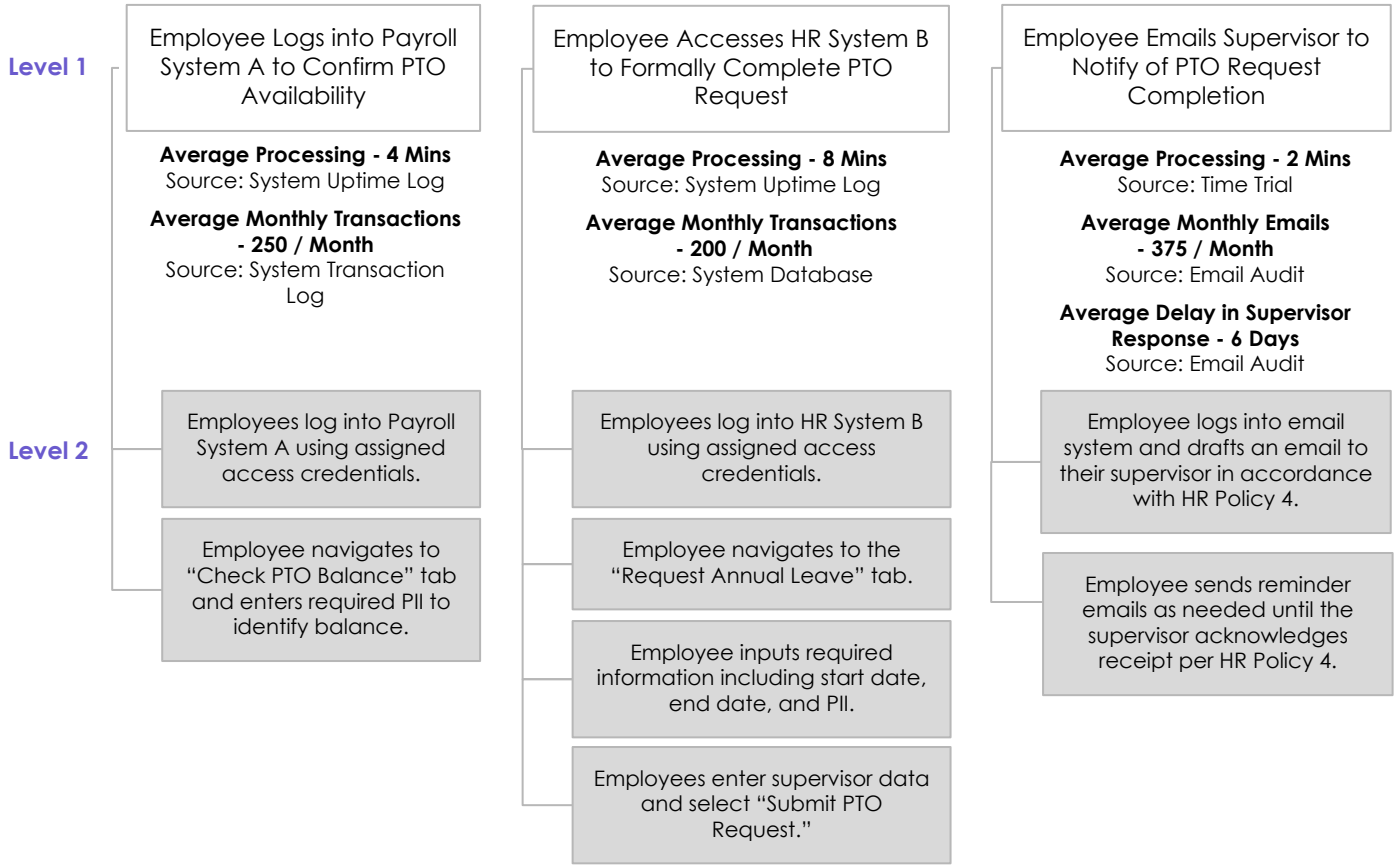
Example: Step 1 of PTO Request Process



Process and Value Mapping

STEP C:
Adding Quantitative Data

Example: Layering Quantitative/Qualitative Data on the Level 1/Level 2 Employee PTO Request Process Map.



TYPES OF DATA TO INCORPORATE IN PROCESS MAPPING EXERCISES

Resourcing and Points of Contact
The number of employees working on each individual process step, as well as who is accountable for actually performing the activity.

Inputs and Outputs
Inputs include forms, systems, reports, data and other elements that feed into the process. Outputs include what is produced through the process.

Right First Time (RFT)
The percentage of units or procedures that are right the first time received. Other quality metrics can include error or defect rates.

Cycle Time
The amount of time it takes for transaction unit to be produced from start to finish, this can be measured as the throughput time for the entire process or each process step.

Processing Time
The amount of time a unit is acted upon by FTEs to bring it closer to an output. This differs from cycle time in that it does not include delays and wait time.

Decision Analysis
Decision analysis measures the percentage of workflow associated with decision points in process maps (e.g., yes/no decisions).

Process and Value Mapping

STEP D:
Incorporate the Concept of Value

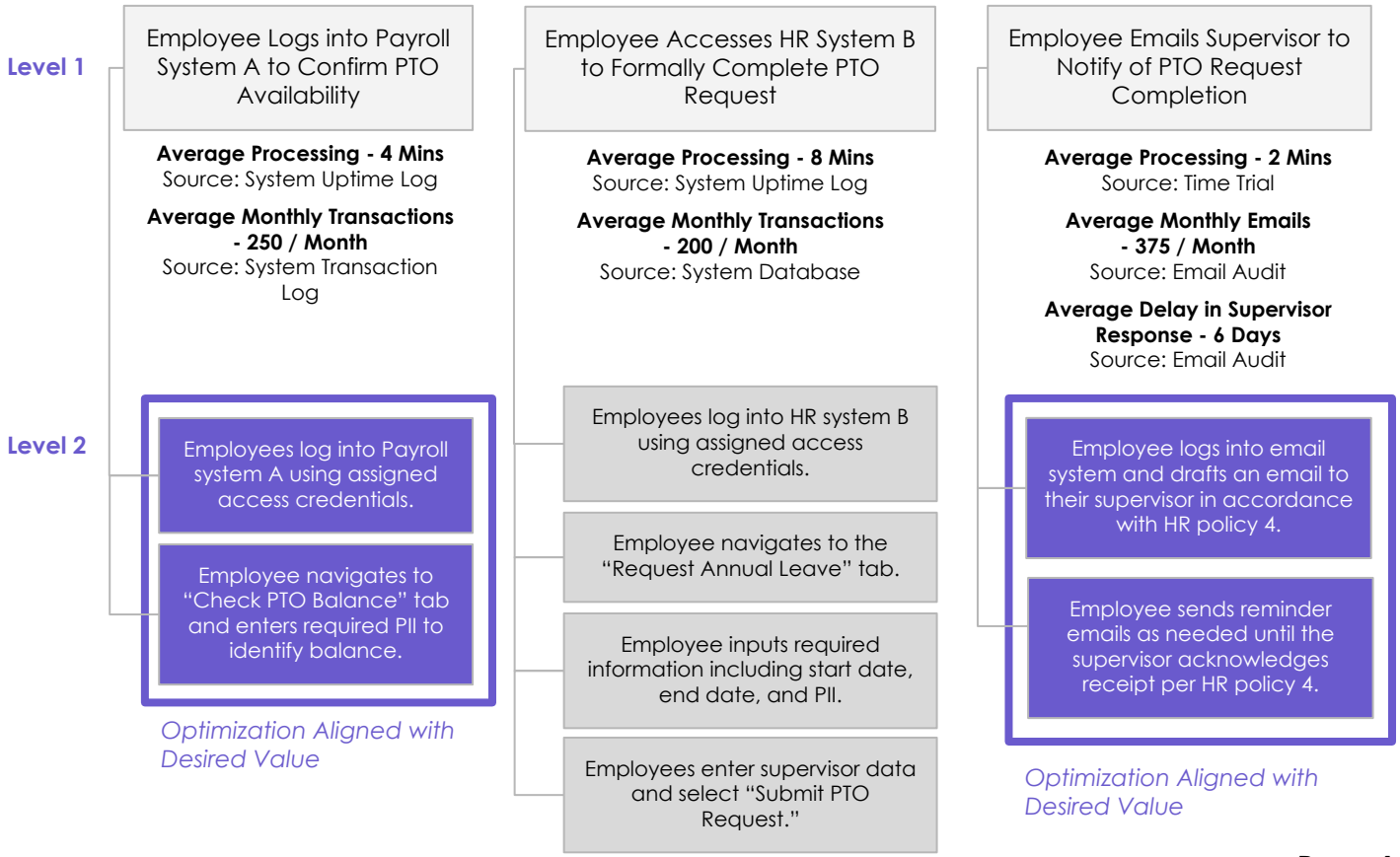
Example: Identifying Value Streams on the Level 1/Level 2 Employee PTO Request Process Map.

Desired Outcome: Reducing Administrative Workload on Employees and Supervisors

An analysis of the current state process map and quantitative data reveal significant opportunities to improve the Employee PTO Request Process through automation. The multiplication of systems, the significant process delays, and associated manual work (individual emails) should all be targets for optimization. The team can work on several projects to reduce the administrative workload (per the desired value outcome).

Potential Automation Projects Aligned with Desired Outcomes:

1) New automated functionality within HR system B to display PTO balance, eliminating the separate access and transactions within system A.
   - ***Alignment with Value:*** *Decreases workload on employees including creating and maintaining credentials for system A and the four minutes per separate transaction.*
2) New automated functionality within HR system B to notify supervisors of the completed PTO request, with automated follow-up until receipt confirmed by the supervisor.
   - ***Alignment with Value:*** *A consolidated PTO request report from HR system B with the option to "reply all" will limit the time supervisors spend searching through separate emails to confirm receipt. The automated reporting function will eliminate employee time spent writing individual emails, increase compliance with standard information inputs required in the email, and reduce the number of follow-ups required.*



Process and Value Mapping

STEP E:
Develop a Targeted Improvement Strategy

Armed with a comprehensive understanding of the current state via Steps A-D, the RPT team should create a targeted improvement strategy. It must examine the end-to-end current state process to reveal opportunities to optimize process outputs and outcomes. Five specific assessment elements are defined below as an analytical framework for developing an improvement strategy:

IMPROVEMENT STRATEGY - EVALUATING CURRENT STATE PROCESSES

1 QUALITY

- Are process outputs delivered in adherence within SLAs and other stated requirements?
- What are the failure rates?
- Are customers satisfied with products and services received?

2 VARIANCE

- Is the process performed the same across organizations and geographic locations?
- Is the process performed the same for every input (e.g., common process or special case processing)?

3 EFFICIENCY

- How many resources are dedicated to completing this process?
- Which process steps are completed manually?
- How does process performance compare to relevant benchmarks?

4 THROUGHPUT

- What are the characteristics of process inputs, outputs, and workflow (format, frequency, timeliness)?
- Are there pooling queues in the process where work sits? How long does work wait in between process steps?

5 CONSTRAINTS

- What constraints are placed in the process by regulations, policies, or performance standards?
- What constraints are placed on the process by interdependent or concurrent business processes?

The assessment elements above ensure an RPT team thoroughly examines potential challenges in the current state process. The final step in developing an improvement strategy is to choose a remediation tactic. These tactics can include standardization, elimination, optimization, and automation. The graphic on the next page provides a summary of each tactic. Depending on the complexity and scope of the business challenge under review, the improvement strategy will likely require effectively deploying multiple tactics.

Process and Value Mapping

IMPROVEMENT STRATEGY - CHOOSING THE RIGHT TACTICS

STANDARDIZATION

Standardize - Process additions, modifications, or deletions that create organization-wide or agency-wide consistency in performance.

Standardize - Identification of a best process among offices or regions performing the function and implement nationally or agency-wide.

ELIMINATION

Eliminate - Legacy activities, processes, requirements, and deliverables that are no longer needed or can be done less frequently because of a change in business requirements, technology, or partner needs.

Eliminate - Controls or standards that are too stringent and cause the agency or its partners unnecessary work.

OPTIMIZATION

Optimize - Processes, requirements, and deliverables that can be done more efficiently, in less time, or more accurately.

Optimize - Process additions, modifications, or deletions that would streamline work products to increase efficiencies, or increase the usability by customers, partners, and the public.

Optimize - Process additions, modifications, or deletions that would more closely align workload with organizational missions.

AUTOMATION

Automate - Processes, tasks, and activities that are manual, rule-based, and mundane to free up employee time for more complex, higher-value work.

Automate - Critical processes, tasks, and activities that must be performed accurately and must avoid the risk of human error.

Automate - Analysis, reporting, and data streams for agency or government-wide stakeholders.

IMPROVEMENT STRATEGY - VALIDATING THE APPROACH

Once the RPT team has identified the most important challenges and the right process improvement tactics, it must quickly validate the approach. This usually entails creating a future state process map to compare performance and procedures against the current state. The following evaluation criteria propose a backward and forward review of the process to ensure the team has identified a comprehensive and effective solution, whether it be elimination, optimization, or automation.

WALK BACKWARD THROUGH THE PROCESS

- Will each step get what it needs from the previous step?
- Will each step know how many work items are coming to it?
- Will this step have the tools, information, supplies, and resources it needs from the previous step?
- Will all actions between steps be documented with established metrics and procedures?

WALK FORWARD THROUGH THE PROCESS

- Will each step provide work to the next step at an appropriate pace?
- Will this step quantify a quality output for the next step?
- Does the step make the right decisions to appropriately influence future steps?
- Are there important variables created within this step that have downstream impacts?
- Does this step properly notify people when work starts? Does it trigger downstream action?

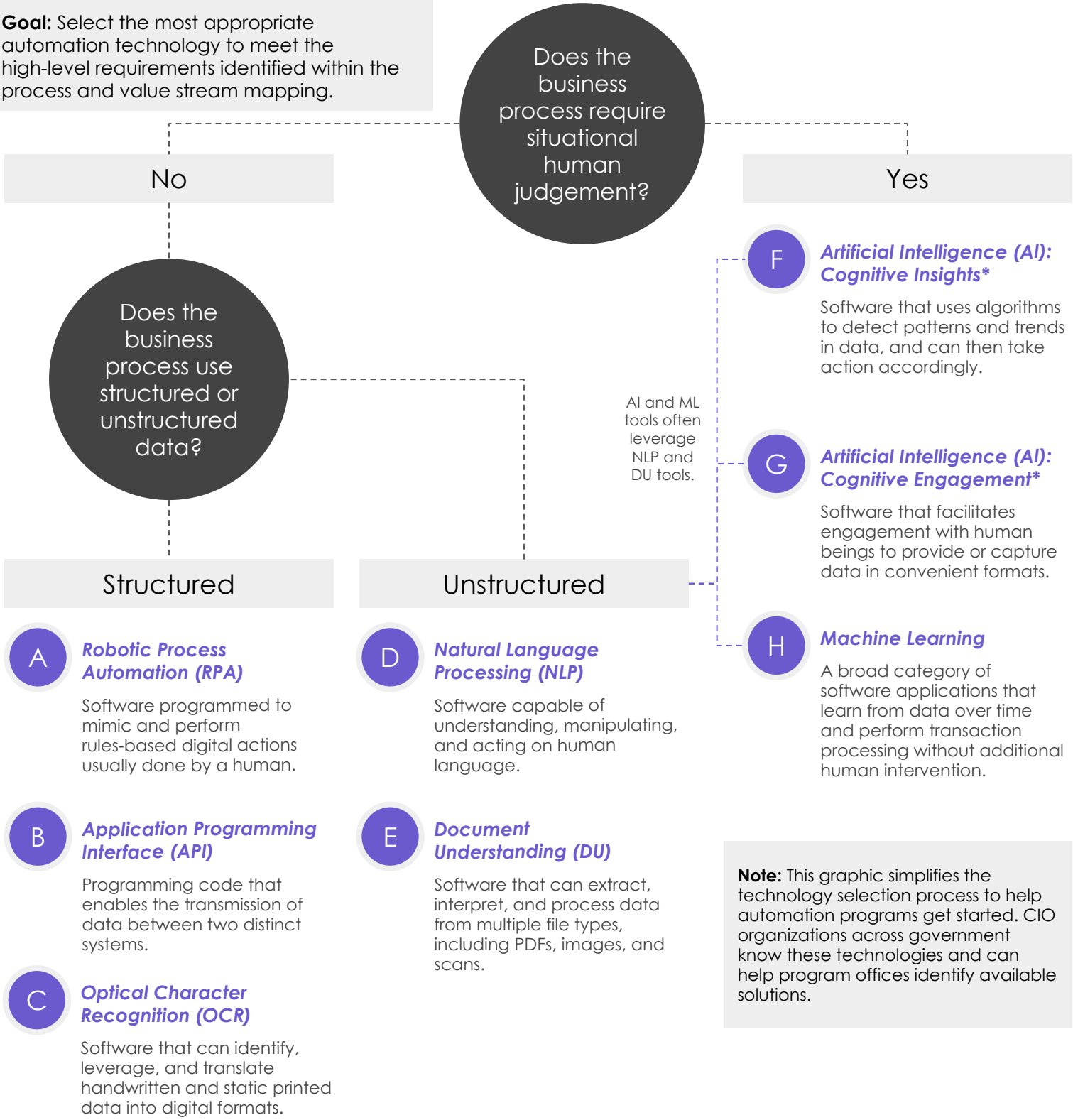
THE ENTIRE PROCESS START TO FINISH

- Will the process meet end customer timing requirements?
- Will the process meet end customer quality requirements?
- Is the process measurable and predictable?
- Does the process cost the right amount and have the right amount of resources applied?
- Can management properly oversee process performance through metrics and throughput milestones?

Technology Assessment

SELECTING THE RIGHT AUTOMATION TECHNOLOGY

Goal: Select the most appropriate automation technology to meet the high-level requirements identified within the process and value stream mapping.



A — *Robotic Process Automation (RPA)*

Software programmed to mimic and perform rules-based digital actions usually done by a human.

B — *Application Programming Interface (API)*

Programming code that enables the transmission of data between two distinct systems.

C — *Optical Character Recognition (OCR)*

Software that can identify, leverage, and translate handwritten and static printed data into digital formats.

D — *Natural Language Processing (NLP)*

Software capable of understanding, manipulating, and acting on human language.

E — *Document Understanding (DU)*

Software that can extract, interpret, and process data from multiple file types, including PDFs, images, and scans.

F — *Artificial Intelligence (AI): Cognitive Insights**

Software that uses algorithms to detect patterns and trends in data, and can then take action accordingly.

G — *Artificial Intelligence (AI): Cognitive Engagement**

Software that facilitates engagement with human beings to provide or capture data in convenient formats.

H — *Machine Learning*

A broad category of software applications that learn from data over time and perform transaction processing without additional human intervention.

Note: This graphic simplifies the technology selection process to help automation programs get started. CIO organizations across government know these technologies and can help program offices identify available solutions.

***Source:** Naming conventions leveraged from Harvard Business Review - https://hbr.org/2018/01/artificial-intelligence-for-the-real-world

Automation Design

CODIFYING THE DESIGN SPECIFICATIONS FOR THE AUTOMATION

Goal: Identify and catalog design specifications for the automation for people to use to develop and deploy it.

After determining the process improvement strategy and technology solution, the automation program should transform business and performance requirements into an actionable automation design. When designing an automation, key stakeholders include the process owner, process SME, automation developer, and automation project manager. Stakeholders should collaborate to design the future state of the automated process. They should use the best practices established above for current state process mapping.

They should document and evaluate each step in the automation to align technical requirements with technical capabilities. When setting up a process for automation, consider the technical systems that will be used, the triggers that will kick off certain steps in the process, the inputs and outputs of the process, and the potential security implications.

Once a future state automation design is agreed upon, create a vetted documentation of the future state, receive approval to proceed, and then engage the development team.

Automation Design Key Considerations

Key Stakeholders

- Project Owner and Subject Matter Expert
- Project Developer
- Automation Project Manager

Process Description and Scope

- Current Process Flow Diagram
- Future State Automated Process Flow Diagram
- Technical Systems
- Triggers
- Inputs/Outputs
- Security Considerations

3

Deployment

An overview of agile methodologies and strategies for rapidly planning, deploying, and managing automations.

Definition and Scoping

DEFINING AUTOMATION OPPORTUNITIES USING STANDARD TEMPLATES

Goal: Define automation projects using a standard template to make it easy for leaders to review and manage the projects internally.

In the ideation and solutioning phase, the automation program can narrow the choices from a large list of business challenges to vetted automation opportunities for which there is a selected technology and strategy for deployment within a process.

The figure below provides a sample consolidated definition template for the automation program to begin documenting project descriptions, justifications and resourcing. Use this template for both managing the automation program and reviewing opportunities with executive leadership. The straightforward template is intended to provide leadership only with critical data on each project. As noted, the leadership team should have access to estimated resources required for each project, as well as a description with enough detail on outcomes to enable an informed decision.

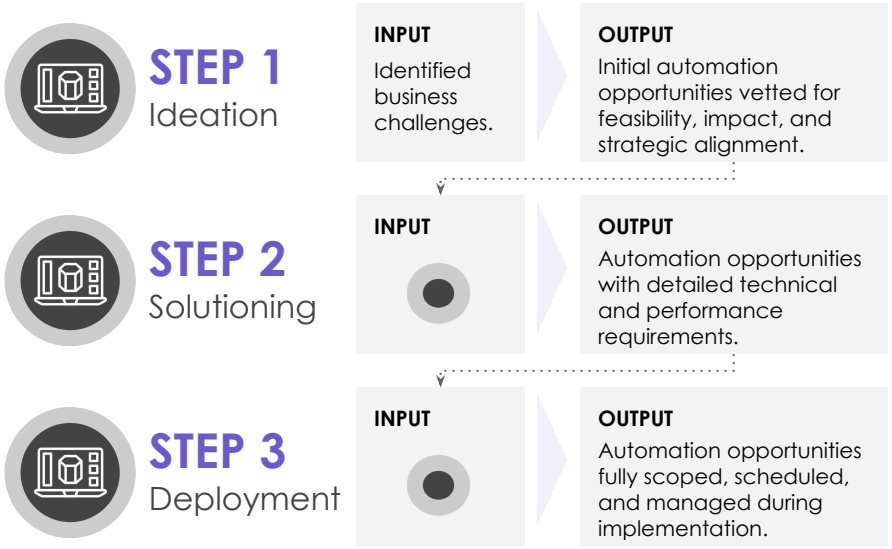


Figure: High-Level Automation Definition Template

Project ID	Project Description	Impact	Feasibility	Hours Savings Projection	Resourcing	COP POC
A-21-9 (Automation, FY, Project #)	Contractor Responsibility Determination Screener Every contracting officer (CO) has to conduct a contractor responsibility determination to determine if companies who submit offers in response to the solicitation are responsible in accordance with FAR. To accomplish this task they must manually research offerors DUNS number in both SAM.gov and FAPIIS.gov to summarize vendor information and document findings. An RPA bot could accomplish these tasks and save significant agency-wide resources.	Impact **7** (Ranking on a 1,3,7,9 scale). This would provide much needed capacity for agency COs.	Feasibility **7** (Ranking on a 1,3,7,9 scale). The agency can leverage existing technology but GSA systems access could be a constraint.	Hours Savings Projection **4,000** Estimated annualized hours calculated using the following inputs - number of people performing the process * average hours spent per week *52 weeks.	Resourcing **160** This will require 120 developer hours and 40 business analyst hours.	COP POC **First Name, Last Name** Office of Acquisitions

POAM Documentation

PROJECT POAM DOCUMENTATION AND SCHEDULING

Goal: Manage and rapidly deploy automations through developing streamlined POAM documentation.

Managing approved automation deployments requires a comprehensive project Plan of Actions and Milestones (POAM). A sample is included below but, at a high level, the POAM should include pertinent project details and an implementation timeline that lays out key steps, deliverables, and milestones. It is important to note not all automation projects are created equal. Simple projects require limited project planning, have few process steps and stakeholders, and have condensed timelines. Other projects can be more complex, involve multiple stakeholder groups, and require greater accountability. While the team must use a standard POAM document for every project, there will likely be variations in practice for the team that will develop the documents.

Figure: Sample POAM Documentation

OPTIMIZATION PROJECT PLAN				
Project Name: Contractor Responsibility Determination Screener **Project ID:** A-21-9 **Accountable Official:** Mary Smith **Project Manager:** John Smith **Lead SME:** Janet Smith **Current Status:** Ongoing	**Projected Hours Saved**	4,000	**Target Completion Date**	7/1/21
	Project Description and Scope	Contracting officers conduct contractor responsibility determination to evaluate companies who submit responses to RFQs. This requires manually researching offerors DUNS number in both SAM.gov and FAPIIS.gov to summarize vendor information and document findings. An RPA bot could accomplish these tasks and save significant agency-wide resources.		
	Improvement Plan Summary	The automation team will conduct a rapid 60-day assessment of the contractor responsibility determination process to capture the current state process, assess systems access, and complete the process design document for the RPA bot. The development team will then have 30 days to develop and deploy the automation, including user acceptance testing.		

Project Phase	Q1	Q2	Q3	Q4	Completion
Project Approval and Launch					[Date]
Project Plan Completion					[Date]
Current State Assessment					[Date]
Process Design Document					[Date]
Automation Development					[Date]
Automation Testing					[Date]
Automation Launch					[Date]
Change Management					[Date]
Task Status	**Complete**	**Ongoing**	**Planned**	Link to Risk Register	

Accountability and Metrics

ESTABLISHING A DEPLOYMENT SCHEDULE AND CADENCE OF ACCOUNTABILITY

Goal: Establish accountability and reporting mechanisms to drive rapid resolution of implementation challenges and deployment of high-impact automations.

A DEPLOYMENT SCHEDULE

RPT Program Executives should leverage the project POAM documentation and conduct macro analyses across the entire slate of projects to identify whether the rollout schedule is feasible and aligns with available resources and agency strategy. A final deployment schedule or Gantt chart can help organize project rollout in a logical approach that considers interdependencies, resources, and program objectives. Once the schedule is approved, implementation and dashboard creation should begin.

As RPT is intended to be continuous, the automation programs should identify, scope, and deploy projects on an ongoing basis. The deployment schedule will likely need to be updated on a monthly basis to provide leadership with insights on which projects are active.

See Appendix G for Sample Schedule

CADENCE OF ACCOUNTABILITY

As the automation program progresses through the ideation, solutioning, and deployment phases, establish a cadence of accountability for executive reporting and consultation. Given the varied duration of automation projects, a monthly cadence is likely optimal to ensure short-term projects are being completed on schedule and long-term projects continue to progress through their POAMs.

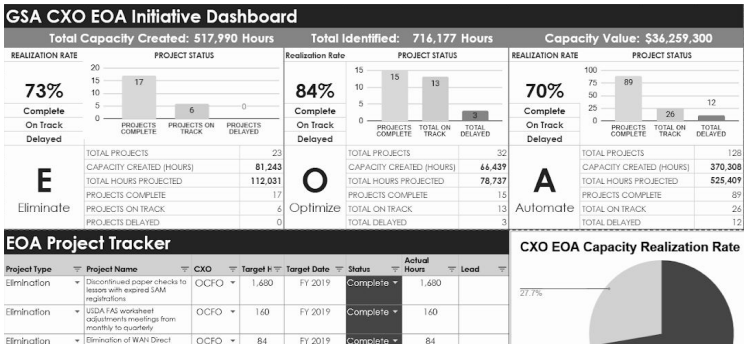
Collaborative meetings with program executives should leverage a program dashboard like the one shown below. As needed, drill down into individual project POAMs to identify roadblocks and plan mitigation strategies. Capturing action items and follow ups are critical since **the RPT methodology is intended expedite organizational transformation.**

INITIATIVE DASHBOARDS AND EXECUTIVE REPORTS

Executive engagement and agile management are critical facets of a successful automation initiative. The best management tool for achieving and maintaining these outcomes is a comprehensive and transparent performance dashboard that displays all approved automation initiatives, progress to date, and program-level key performance indicators.

Automation initiatives can involve hundreds of projects and stakeholders. A program dashboard allows constant collaboration, information sharing, and real time data for the project sponsors. However, an effective program dashboard does not have to be a huge lift to build or maintain. The software just needs to offer multiple users the ability to access and update information simultaneously. Simple tools like Google Sheets meet that requirement.

See Appendix I for Sample Dashboard



As previously stated, it is important for the automation program to establish ambitious goals at the outset. Include all metrics needed to assess those goals in the performance dashboard. See Appendix I for more in-depth guidance.

RPT Toolkit

See Appendix

Below is a list of resources found in the RPT Toolkit relevant to the Deployment phase.

1. Sample Deployment Schedule
2. Sample Project Metrics
3. Sample Program Dashboard

CoP Leadership & Contributors

The RPA CoP would like to thank the following individuals for their continued leadership and support:

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4

RPT TOOLKIT

Tools and templates to help accelerate your agency's launch of an effective RPT initiative.

Building a Change Coalition

RPT Toolkit - Appendix A (Community of Practice Charter)

Purpose

The Purpose of the Community -

Includes the community's goals, metrics, and mission. What challenges was the COP formed to resolve? What is the operational scope? How will the executive leadership team measure progress?

Benefits of Community -

What specific outcomes does the COP intend to achieve? Who will benefit from these outcomes?

Community Structure

Roles and Responsibilities -

High level description of the roles and positions in the community.

Community Rules -

Any rules the community must adhere to, expectations for event cadence, and a communication plan.

Internal Structure -

Internal community structure, such as the number of practice areas involved and how they will be managed by community members.

Deliverables -

Key products and outputs for the COP.

Opportunity Identification

RPT Toolkit - Appendix B (Sample Staff Survey)

Rapid Process Transformation (RPT) Employee Survey

The RPT Initiative seeks to identify and plan to eliminate, optimize, and automate requirements and processes that increase employee and customer workload. The more efficient our organization becomes, the better customer service we can provide, and the more focus we can shift to analytics, management, and planning support.

The leadership team needs your help to make this initiative a success. Every suggestion will be evaluated and reviewed by leadership. We value your suggestions and feedback on the RPT Initiative, though it is important to note filling out the survey is entirely voluntary.

The survey includes three sections: 1) Elimination; 2) Optimization; and 3) Automation. Please put your great ideas in the appropriate section.

Agency-Specific Demographic Questions - The survey should capture enough information on the respondent to enable sorting responses into meaningful sub-categories (e.g., job function, region, office alignment). It is important to also include a question on whether the respondent is a Federal employee. This will allow the agency to ensure contractors do not respond to the survey, which would invoke the requirements of the Paperwork Reduction Act.

Section 1: Elimination

This section of the survey collects ideas on processes, requirements, and deliverables that create an unnecessary burden for our employees or customers and can be eliminated.

Some questions to consider in your responses:

1. Are there legacy processes, requirements, and deliverables that we no longer need?
2. Can we change how often we do some activities to reduce overall workload?
3. Can we eliminate requirements and standards that create work for our customers and employees?

- Do you have an idea for processes, requirements, or deliverables that could be eliminated (Yes/No).
- Please identify whether the idea will benefit internal operations, customer operations, or both.
- Identify all offices within the agency that will benefit from the idea (drop down list).
- Describe your idea below. Please provide enough information so the leadership team can adequately assess and evaluate its merits (open text response).
- Provide an estimate of how many workload hours could be saved each year by implementing your recommendation. Please provide a brief explanation and rationale (open text response).

Opportunity Identification

RPT Toolkit - Appendix B (Sample Staff Survey)

Section 2: Optimization

This section of the survey collects ideas on processes, requirements, and deliverables that can be improved or performed more efficiently.

Some questions to consider in your responses:

1. What internal processes or tasks can we improve to be more efficient?
2. Are there internal processes that we can improve to more closely align with agency priorities?
3. What customer-facing processes can we transform to reduce burden?

- Do you have an idea for processes, requirements, or deliverables that could be optimized (Yes/No).
- Please identify if the idea will benefit internal operations, customer operations, or both.
- Identify all offices within the agency that will benefit from the idea (drop down list).
- Describe your idea below. Please provide enough information so the Leadership Team can adequately assess and evaluate its merits (open text response).
- Provide an estimate of how many workload hours could be saved each year by implementing your recommendation. Please provide a brief explanation and rationale (open text response).

Section 3: Automation

This section of the survey collects ideas on processes that might benefit from additional automation.

The criteria below will help us assess which business processes can be automated:

1. Is the process clearly structured? Could a set of instructions easily be given to a new employee?
2. Does the process use multiple applications and tools, or just one?
3. Does the process rely on well-established rules?
4. Is the process prone to human error?
5. Is there a high, steady volume of activity? (e.g., is it worth the investment in automation?)

Some potential applications or areas for automation: 1) manual data entry and transfer between systems; 2) creation of standard data reports; 3) transaction processing; 4) standardized analytics and metrics reporting; 5) compliance checks and sampling; 6) customer interactions and communications; and 7) tracking task completion.

- Do you have an idea for processes, requirements, or deliverables that could be automated (Yes/No).
- Please identify if the idea will benefit internal operations, customer operations, or both.
- Identify all offices within the agency that will benefit from the idea (drop down list).
- Describe your idea below. Please provide enough information so the Leadership Team can adequately assess and evaluate its merits (open text response).
- Provide an estimate of how many workload hours could be saved each year by implementing your recommendation. Please provide a brief explanation and rationale (open text response).

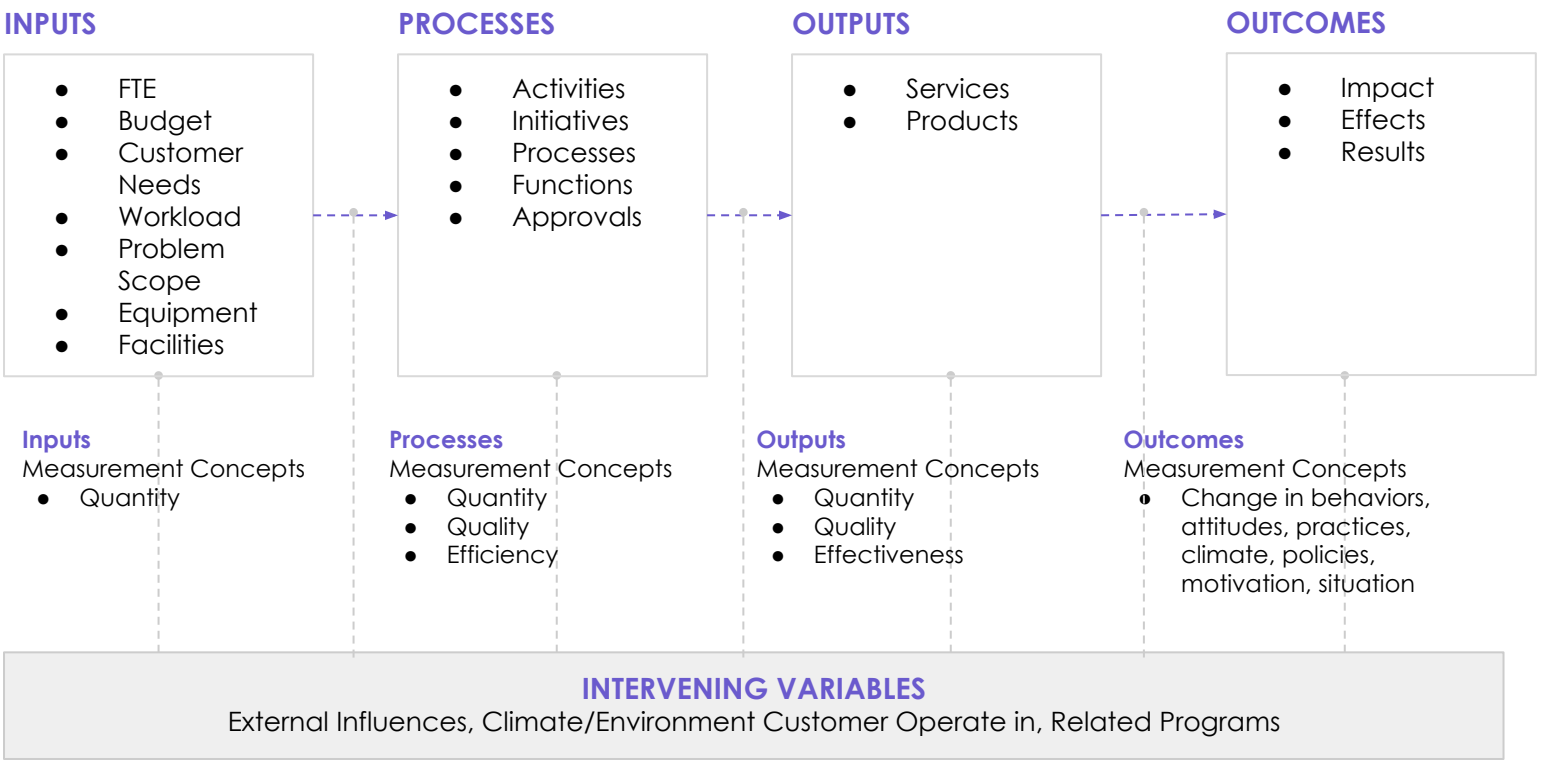
Opportunity Identification

RPT Toolkit - Appendix C (Performance Logic Model)

Logic models are visual diagrams used for planning, collaborative consensus-building, knowledge development, and evaluation including selection and alignment of measurements. If aligned properly via valid performance logic, OCIO-IA can be assured the performance measures effectively support higher level strategic goals and key outcomes.

The logic model is a performance value chain linking events and which provides a blueprint for mission achievement. Typically, it is a graphic representation illustrating the rationale behind each activity, process, program, or investment; it shows the causal relationships among today's activities, future outcomes, and the activities and strategies in between. It is goal-oriented, containing the goals and performance measures for each phase.

As shown in the figure below, the building blocks of a logic model are inputs, processes, outputs, outcomes, and intervening factors. The program's logical flow is reverse engineered from outcomes to determine critical elements, relationships, key handoff points, and measures within each category.



Opportunity Identification

RPT Toolkit - Appendix D (Sample Vetted Projects List)

Elimination Projects						
ID	**Project Description**	**Impact**	**Feasibility**	**Projected Savings**	**Resourcing**	**COP POC**
E-21-009	Eliminate Data Discovery Process Steps Eliminate process steps required to find data on new and existing projects by creating an automated, fixed report output that will simplify manual data discovery by incorporating all required information.	**7** [1,3,7,9]	**9** [1,3,7,9]	1,000	25	Jane
E-21-038	Eliminate Extra Printers Eliminate extra printers and use existing applications to reduce paper consumption.	**3** [1,3,7,9]	**9** [1,3,7,9]	250	10	Mike
Optimization Projects						
ID	**Project Description**	**Impact**	**Feasibility**	**Projected Savings**	**Resourcing**	**COP POC**
O-21-097	Consistent Project Identification Number Create a consistent project identifier that follows a project through the several different phases, rather than having a unique ePM number, RWA number, contract number, PR number, etc.	**9** [1,3,7,9]	**9** [1,3,7,9]	None	None	John
O-21-012	Centralize and Optimize the Dashboarding and Reporting Process Optimize data reporting by creating a centralized repository that contains live data. The current process has multiple redundancies in reports that often tell conflicting stories.	**7** [1,3,7,9]	**7** [1,3,7,9]	1,200	40	Ann
Automation Projects						
ID	**Project Description**	**Impact**	**Feasibility**	**Projected Savings**	**Resourcing**	**COP POC**
A-21-062	Centralized Project Review System Automate the consolidation of all project review comments into a centralized comment management system. This will eliminate the need for separate documents for each round of comments and improve final quality.	**9** [1,3,7,9]	**9** [1,3,7,9]	None	65	Bill
A-21-024	Automate Performance Metric Data Collection Automate the process that takes data from organization expenses and feeds information to performance measures tracking tools.	**9** [1,3,7,9]	**1** [1,3,7,9]	5,400	160	Mia

Project Identification

The project ID is a unique, user-assigned identifier that is used to reference each opportunity submitted during the lifecycle of a project. Organizations should not change or re-use a project ID that is in use, or one that has been used with a deleted project.

Projected Savings

When employees submit their project ideas, they should include an estimate for annualized hours saved. However, before moving forward with a selected project, leadership should verify these projections. An opportunity may apply agency-wide, drastically increasing the projected hours saved. The organization should also estimate the resources required to implement a given project during the vetting process. Leadership can use these projections to calculate the ROI of different projects, allocating organization resources to maximize hours saved.

Opportunity Validation

RPT Toolkit - Appendix E (Leadership Prioritization Matrix)

Rapid Process Transformation (RPT) Leadership Project Prioritization Matrix

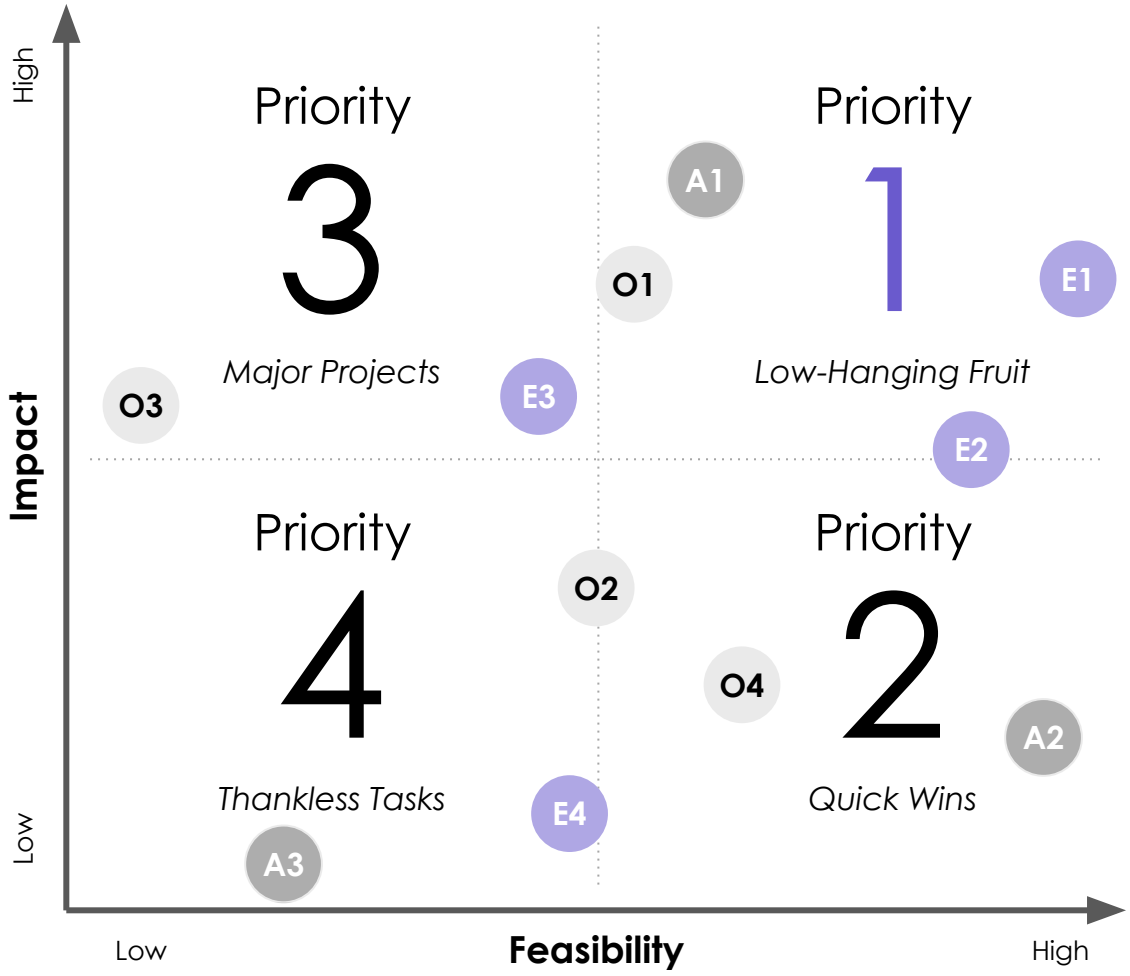
Establishing a formal evaluation process for RPT projects ensures that the most impactful projects are prioritized for delivery. To effectively evaluate each process, office and department leadership will need to collaborate with process subject matter experts and the transformation team to evaluate each project's feasibility, strategic alignment, and impact. Each criterion for prioritization is further explained in the tables below. The associated prioritization matrix can also be used to score each project.

RPT Opportunity		Feasibility		Strategic Alignment		Impact		Priority	
	Project Type	Weight	2	Weight	1	Weight	3	Total	Level
RPT Opportunity 1	Eliminate	9	18	9	9	9	27	54	1
RPT Opportunity 2	Optimize	7	14	7	7	7	21	42	1
RPT Opportunity 3	Automate	3	6	3	3	3	9	18	3
RPT Opportunity 4	E,O,A	(1/3/7/9)	X*2	(1/3/7/9)	X*1	(1/3/7/9)	X*3		
RPT Opportunity 5	E,O,A	(1/3/7/9)	X*2	(1/3/7/9)	X*1	(1/3/7/9)	X*3		
RPT Opportunity 6	E,O,A	(1/3/7/9)	X*2	(1/3/7/9)	X*1	(1/3/7/9)	X*3		
RPT Opportunity 7	E,O,A	(1/3/7/9)	X*2	(1/3/7/9)	X*1	(1/3/7/9)	X*3		
RPT Opportunity 8	E,O,A	(1/3/7/9)	X*2	(1/3/7/9)	X*1	(1/3/7/9)	X*3		
RPT Opportunity 9	E,O,A	(1/3/7/9)	X*2	(1/3/7/9)	X*1	(1/3/7/9)	X*3		
RPT Opportunity 10	E,O,A	(1/3/7/9)	X*2	(1/3/7/9)	X*1	(1/3/7/9)	X*3		
Priority Scoring		**Priority 4: 0-12**		**Priority 3: 13-26**		**Priority 2: 27-40**		**Priority 1: 41-54**	

Feasibility	Is Elimination, Optimization, or Automation the right approach to the identified business challenge?	
Areas of Analysis	**Attribute - Legacy, Outdated, Manual, or Repetitive Process**	**Attribute - Difficulty to Implement**
	Process No longer Mandated Legacy Process Outdated Requirements Repetitiveness of Process Manual, Rules-Based Degree of Standardization	Number of Locations or Organizations Involved Organizational and Operational Readiness Quality of Process Definition/Documentation Subject Matter Expert Availability Congressional Mandates or Requirements
Strategic	Does the Elimination, Optimization, or Automation project align with the department/office and agency strategy?	
Areas of Analysis	**Attribute - Business Unit Alignment**	**Attribute - Agency Strategic Alignment**
	Business Unit Goals and Objectives Leadership Priorities and Strategies Organizational Change Readiness	Agency Mission and Goals Leadership Priorities and Strategies PMA and CAP Goals Broader Agency-wide Deliverables and Initiatives Congressional Mandates or Requirements Agency Change Readiness
Impact	How impactful is the Elimination, Optimization, or Automation project to stakeholders and the agency?	
Areas of Analysis	**Attribute - Quantitative Value**	**Attribute - Qualitative Value**
	Labor Hour Savings Reduction in Cycle Time Increase in Throughput Increased Process Outputs	Improved Employee Morale Increased Compliance/Auditability Increased Process Accuracy

Opportunity Validation

RPT Toolkit - Appendix F (Feasibility and Impact Design Matrix)



Low-Hanging Fruit

Ideas in this category will have a high impact on an organization and are possible. These projects should be an organization's priority because they serve as a proof of concept and establish buy-in from executives and employees.

Quick Wins

These projects require limited effort and have a lower impact than other projects. These tasks or solutions can be completed easily. They provide needed proof of concept for nascent RPA programs.

Major Projects

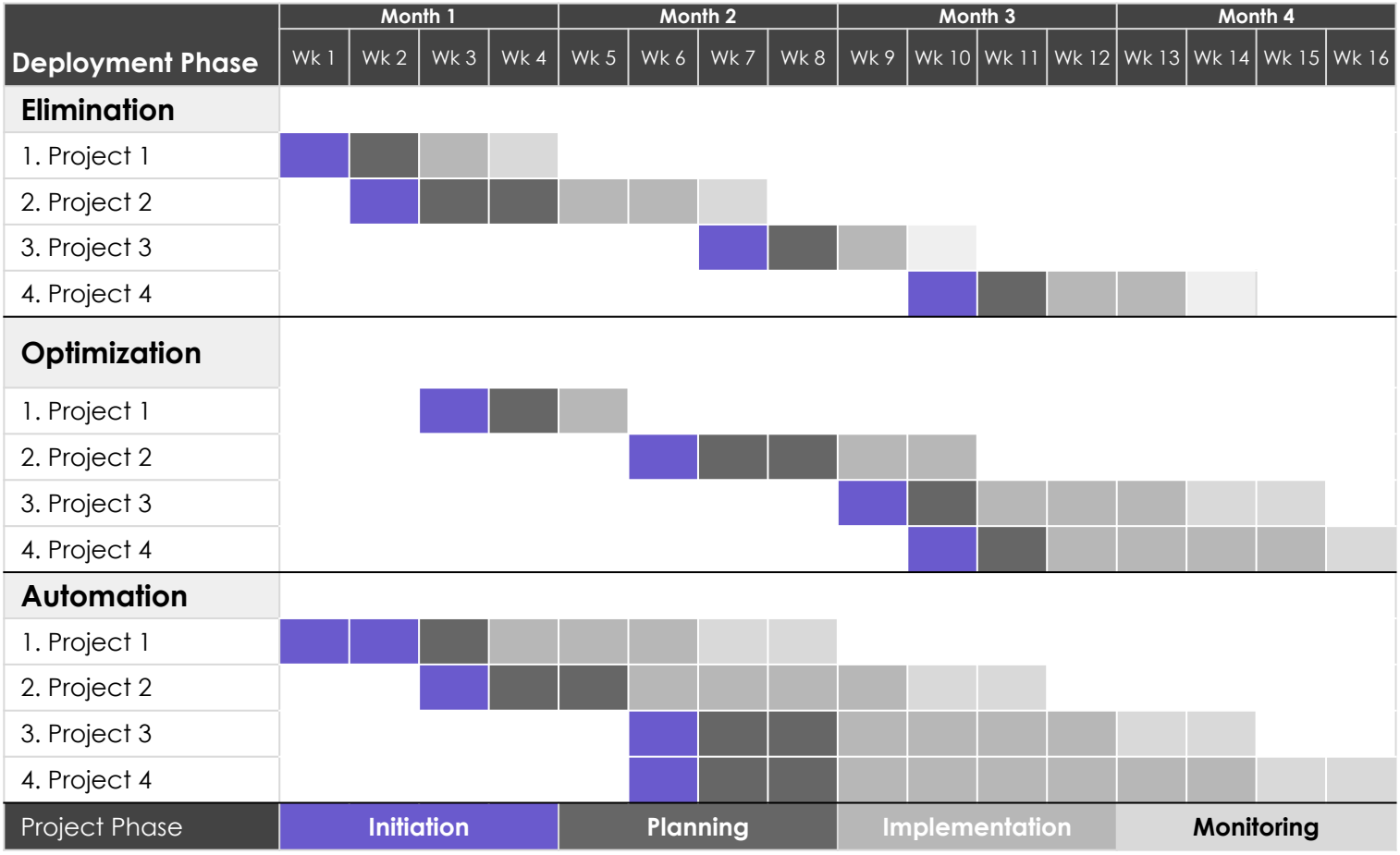
These projects will have a high impact, but they'll take a lot of effort to complete. In many cases, these projects are resource and time intensive. Opportunities in this category should be evaluated initially, but not started until there is sufficient momentum and identified resources.

Thankless Tasks

These projects have low impact and low feasibility. These projects may be high effort, or require a large amount of resources that should be more efficiently allocated elsewhere. These ideas are painful to complete and they take time away from more impactful ideas. Avoid these projects.

Accountability and Metrics

RPT Toolkit - Appendix G (Sample Deployment Schedule)



Initiation

In this phase, the RPT project is deemed worthy to proceed, and a project charter is developed. Stakeholders agree that the hours saved by this project, and the shift of these hours to higher value work, justify the undertaking.

Planning

Project management begins in this phase. During this phase, organizations establish key performance indicators (KPIs), milestones, POAMs, Gantt Charts, and deadlines. Additionally, risk assessments are conducted.

Implementation

Project deliverables are carefully developed according to the guidance determined in the planning phase. Project metrics are captured through status meetings and reporting, and determine the level of success the project will achieve continuing down its current path. Managers should course-correct as necessary.

Monitoring

As project deliverables are being completed, project managers should ensure all milestones and KPIs are being met. As late-stage project deliverables are presented to the end users, managers must verify customers are receiving a product that meets their needs. If not, they must pivot accordingly to achieve all project goals and functionality.

Accountability and Metrics

RPT Toolkit - Appendix H (Sample Project Metrics)

Total Capacity Identified

Before a project is started, the organization should estimate the total annualized hours of capacity it will save. This early calculation aids in selecting which projects to move forward with, as well as calculate an initiative's projected overall return on investment. The most common way to track this metric is using labor hours; however, some organizations may use Full-time Equivalents (FTEs) to measure impact.

***Formula** = (Total # of Employees Performing Task * Average # of Hours per Week * 52)*

Total Capacity Created

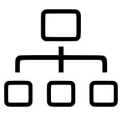
Total Capacity Created measures the amount of time an organization saves by implementing a project. Capacity *created* is often used instead of capacity *saved*, because the employees who had previously done this work can focus on higher-value tasks, rather than being fired. Total capacity created is **only collected and tracked after a project is implemented.** Tracking the metric after implementation accounts for any unforeseen changes to a project during the implementation phase. This metric is typically used with *total capacity identified*, allowing agencies to also calculate a realization rate.

Capacity Value

This is another common metric used to track and monitor many RPT initiatives, since it presents the annualized hours of capacity in a metric that is easier to understand and measure a project's return on investment. Many organizations use an average hourly wage across the entire organization to calculate the value of the capacity created. However, some may choose to distinguish the wages between employees at different levels. GSA has used $70 an hour to measure the value of capacity based on average salary. Using different hourly wages for each position may not be necessary for your organization. It makes calculating the capacity value more complex, and only slightly improves accuracy.

Project Deployment Status

Track this metric to ensure the project is meeting all milestones and KPIs in the deployment phase. Quick action is required if any last-minute changes need to be made during deployment, so careful monitoring of deployment status is paramount.



Office Project Deployment

This metric helps manage project deployment across various offices in an agency. This metric is useful for efficiently allocating resources and for tracking adherence to time schedules, project plans, milestones, and KPIs.

Accountability and Metrics

RPT Toolkit - Appendix I (Sample Program Dashboard)

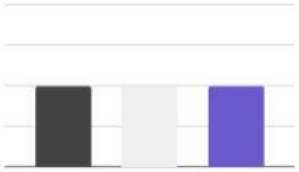
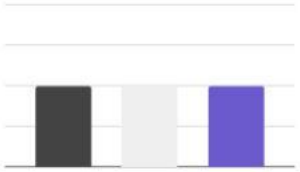
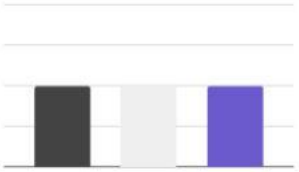
Rapid Process Transformation (RPT) Initiative Management Dashboard

A management dashboard is a simple visual display of the most important information that decision makers need to understand key trends, optimize decision making, and evaluate progress towards an organization's strategic goal. Establishing a centralized, formal management dashboard for RPT projects ensures that leadership is informed on the initiative's progress and has real-time access to KPIs, without interrupting an employee's workflow.

Best Practices for Creating a Dashboard

1. **Think of Your Audience First** - Only include metrics that matter to your audience; more information is not always better. *(What does your audience need to know? How often do they need it?)*
2. **Keep it Simple & Continuously Improve** - Excess information, confusing graphics, and unnecessary features make dashboards difficult to use and understand. If users are not taking away the necessary information, you need to adjust the dashboard. The true value of a dashboard comes from the information it provides its users!

Sample RPT Initiative Dashboard

Total Capacity Created: 30,000			Total Identified: 60,000			Capacity Value: $2,100,000		
Realization Rate	**Project Status**		**Realization Rate**	**Project Status**		**Realization Rate**	**Project Status**	
50%			**50%**			**50%**		
Complete			**Complete**			**Complete**		
On Track			**On Track**			**On Track**		
Delayed			**Delayed**			**Delayed**		
E	Total Projects	10	**O**	Total Projects	10	**A**	Total Projects	10
	Hours Created	**10,000**		Hours Created	**10,000**		Hours Created	**10,000**
	Hours Projected	**20,000**		Hours Projected	**20,000**		Hours Projected	**20,000**
	Projects Complete	5		Projects Complete	5		Projects Complete	5
Eliminate	Projects on Track	3	Optimize	Projects on Track	3	Automate	Projects on Track	3
	Projects Delayed	2		Projects Delayed	2		Projects Delayed	2

RPT Project Tracker

Project Type	Project Name	Office	Target Hours	Target Date	Status	Lead
Elimination	Project #1 Name	X	1,000		On Track	Name
Elimination	Project #2 Name	X	1,000		Complete	
Elimination	Project #3 Name	X	1,000		Delayed	
Optimization	Project #4 Name	X	1,000			
Optimization	Project #5 Name	X	1,000			
Optimization	Project #6 Name	X	1,000			
Automation	Project #7 Name	X	1,000			
Automation	Project #8 Name	X	1,000			
Automation	Project #9 Name	X	1,000			
Automation	Project #10 Name	X	1,000			

RPT Projects by Office

Actual Hours by Office