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Unit 1-Robotic Process Automation Overview

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20NHOP720A – Robotic Process Automation

Learning Objectives

In this Unit, you will learn:

- What Robotic Process Automation (RPA) is
- How automation technologies have evolved over the years and the drivers behind the need for RPA
- The differences between traditional automation tools and RPA
- Examples of RPA use cases in several industries and how RPA is delivering improvement and value
- Challenges and best practices around how to address them
- Typical RPA roles and responsibilities

Agenda

Topics

• Introductions and student backgrounds	10 mins
• Review course objectives and syllabus	10 mins
• Definition of RPA	5 mins
• Evolution of Automation	5 mins
• Traditional Automation vs RPA	5 mins
• RPA Roles and Responsibilities	10 mins
• How RPA is used in Business	10 mins
• RPA Challenges and Best Practices	10 mins
• Knowledge Check	5 mins
• Class Discussion	10 mins
• Assignment Overview	5 mins

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What is Robotic Process Automation?

- Robotic Process Automation (RPA) involves the use of software "bots" to automate tasks (just like a human being was doing them) across application and systems
- The goal of RPA is to automate repetitive, routine, and labor-intensive with a digital workforce, freeing humans up to focus on higher value work using bots
- A bot is a software program that runs on a laptop or mobile device and mimics the user's clicks and keystrokes
- RPA automates manual processes and interacts with programs such as in-house applications or websites - no complex system integration, coding, or direct access to the programs or databases is required
- Bots can operate unattended and run 24x7x365

But…hasn't automation been around for a long time? How is RPA different?

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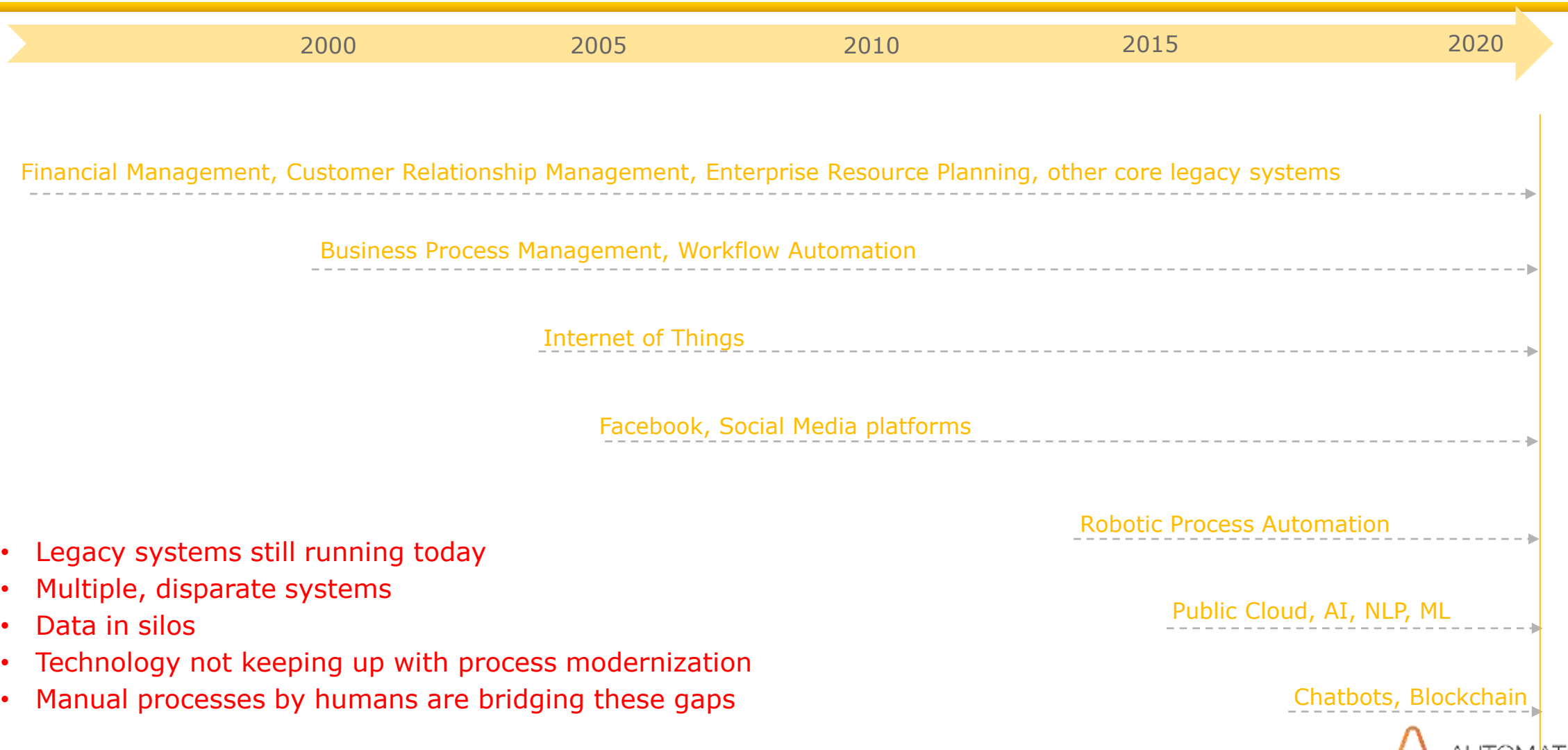
The Evolution of Automation



- Legacy systems still running today
- Multiple, disparate systems
- Data in silos
- Technology not keeping up with process modernization
- Manual processes by humans are bridging these gaps

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Key Benefits of RPA

	Traditional Automation	Robotic Process Automation
Functionality	Workflow is handled by small modules or tools and each tool performs a very specific job.	Focus is to use automation to handle end-to-end processes.
Technology	Relies heavily on programming so the programmers need to have sound knowledge of the domain.	Bots work at the user interface level and mimic the users' actions. No need to worry about the complexity of the application.
Time Constraint	Technical development requires time and as well as rigorous testing afterward.	Doesn't need any complex programming or testing process; hence, time to market is faster.
Personalization	The rigid workflow makes it highly inefficient and at times impossible to personalize the tools.	The automation can span across personal tools (such as calendars and emails) as well as enterprise-grade systems (such as ERP or CRM).

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Key RPA Roles and Responsibilities

- RPA Sponsor
  - Serves as organizational sponsor for RPA initiatives
  - Identifies opportunities for automation
  - Gains buy-in from business leaders and cross-department stakeholders
  - Develops business case justification
- RPA Analyst
  - Interacts with the business stakeholders on selected automation project(s)
  - Understands processes, systems, and data
  - Documents the current state
  - Builds conceptual future state design
  - Gains acceptance from stakeholders and users
- RPA Architect
  - Creates technical blueprint for future state solution
  - Selects automation tools
  - Works with Developer
- RPA Developer
  - Installs automation software components
  - Builds and tests the Bots
  - Conducts user acceptance testing
- RPA Support Specialist
  - Post-production bot support
  - Initial trouble-shooting and diagnosis
  - Works with RPA Developer
  - Gathers user feedback for RPA team

How RPA is Used in Business

Industry	Use Case	Examples of What the Bots are Doing
Healthcare	Patient registration Billing	Emulating human action Conduct high-volume repeated tasks - simulate rekeying of data from one system to another, data entry, copying, and pasting. Multi-tasking - operating multiple and complex tasks across systems helps to process transactions, manipulate data and send reports quickly. "Virtual' system integration - transfer data between disparate and legacy systems and the Cloud instead of developing new data structures. Report generation – automate the extraction of data to come up with accurate, effective and timely reports. Information validation and auditing - resolve and cross-verify data between different systems to validate and check information to provide compliance and auditing outputs Non-traditional data input - allows automated data input through documents and spreadsheets. Administrative tasks – login, password resets
Human Resources	New employee onboarding Payroll process	
Insurance	Underwriting Claims processing	
Manufacturing & Retail	Bills of material Calculation of sales	
Telecom	Service order management Quality reporting	
Travel & Logistic	Ticket booking and changes Refunds	
Banking and Financial Services	Cards activation Frauds claim	
Government	Change of Address License Renewal	

Challenges with RPA

- RPA skills availability
  - Technical skills
  - Process analysis skills
- End-to-end process understanding
- Process ownership
- Employee resistance and onboarding
- Realistic expectations
- Bot maintenance

RPA Best Practices

- Invest in RPA Center of Excellence (COE)
- Organizational commitment and sponsorship
- Transparent communication to employees
- Investment in up-leveling skills

Knowledge Check

What does RPA stand for?

a) Robotic Program Automation

✓ b) Robotic Process Automation

c) Robotic Process Administration

d) All of the above

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What is a Bot?

a) A device that operates unattended

b) A software program that integrates multiple systems

✓ c) A software program that mimics the user’s keystrokes

d) None of the above

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What are some of the key RPA drivers?

a) Organizations have replaced their legacy systems and need automation

✓ b) Data is in silos

c) Technology is keeping up with process modernization

✓ d) Humans spend too much time manually inputting and re-keying information

Which statements are correct?

- ✓ a) RPA can span across personal tools and enterprise systems
- ✓ b) RPA mimics human behaviors
- c) Personalization is difficult with traditional automation
- d) RPA development requires extensive time and rigorous testing

Which best practice addresses employee resistance around RPA?

a) Increased technical training

✓ b) Transparent communication

c) Laid-back approach to RPA

d) All of the above

Which RPA role requires an understanding of processes, systems, and data?

✓ a) Analyst

b) Sponsor

c) Developer

d) Support

Which RPA role is responsible for building and testing the bot?

a) Analyst

b) Sponsor

✓ c) Developer

d) Support

Which are examples of what bots can do?

a) Simulate rekeying of data from one system to another

b) Administrative tasks such as logging in

c) Nontraditional data input

✓ d) All of the above

In-Class Discussion and Exercise

Consider the following drivers behind RPA:

- Legacy systems still running today
- Multiple disparate systems run in organizations
- Data is in silos
- Manual processes are being re-used to bridge gaps

Give an example from your own professional and/or academic background where you have experienced one or more of the above and suggest how RPA could be applied. Hint: refer to the table that discussed “examples of what the bots are doing”

Assignment

Using the industry examples provided as a starting point, research and summarize a published RPA use case. Submit the following to the class Discussion Board:

- Company name and industry
- What was their current state and challenges?
- How did they apply RPA? What solution did they implement?
- What business results did they achieve?
- What do you think their next project should be and why?

Your answer should be 2-3 strong paragraphs. Be sure to cite your information sources.

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Summary

In this Unit, you learned:

- An overview of RPA
- How automation technologies have evolved and led up to the need for RPA
- The people involved in RPA
- How RPA is used in practical business situations
- How to address challenges
- How to adopt best practices

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Unit 2-RPA Requirements Elicitation and Flowcharting

Instructor Name

Course Number – Course Name

Learning Objectives

In this Unit, you will learn:

- The role of the RPA Business Analyst
- Interactions between the RPA Business Analyst, End Users, and RPA Developer
- Process decomposition/flowcharting
- Advanced cross functional flowcharting

Agenda

Topics

• The role of the RPA Business Analyst	5 mins
• RPA Business Analyst interactions	5 mins
• Flowcharting and in-class exercises	30 mins
• Cross-functional flowcharting and in-class exercises	30 mins
• Knowledge check	10 mins
• Assignment overview	5 mins

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The Role of the RPA Business Analyst

- Liaison between end users (also known as Subject Matter Experts – SMEs) and the RPA developers
- Elicits requirements from end users and identifies RPA opportunities
  - Communication skills
  - Knowledge of systems, processes, and data flows
  - Keen eye for process gaps, inefficiencies, and redundancies
- Analyzes and validates RPA opportunities
  - Analytical and problem-solving skills
  - Ability to ascertain business and technical feasibility
  - Articulate business value and impacts
- Responsible for process documentation
  - Current “as-is” state
  - Recommended logical future “to-be” state
- Gains acceptance from stakeholders and users

Sample RPA Business Analyst Job Description

Responsibilities/Duties

- Run workshops with client SMEs to understand the end-to-end processes
- Collect business requirements and identify the suitability of the process for automation
- Identify and assess potential processes for RPA
- Articulate the value proposition to senior level clients (process and automation transformation)
- Prepare for Robotics solution (process redesign, gaps and waste identification)
- Ensuring quality and timeliness of automated processes

Required Qualifications

- Demonstrated experience in business process modeling, process reengineering, and gap
- Must possess strong communication, analytical and problem-solving skills
- Ability to elicit requirements from key stakeholders
- Ability to facilitate working sessions and user group meetings
- Demonstrated ability to create and deliver executive briefings
- Experience in building successful partnerships with business and technical groups
- Proven critical analysis skills

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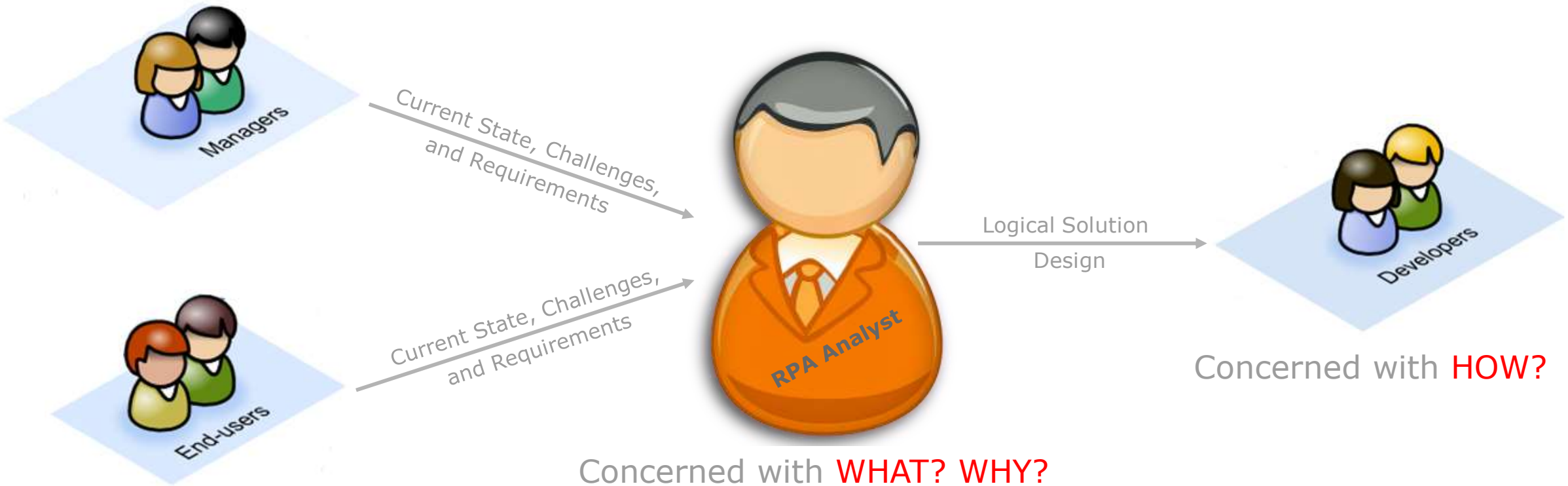
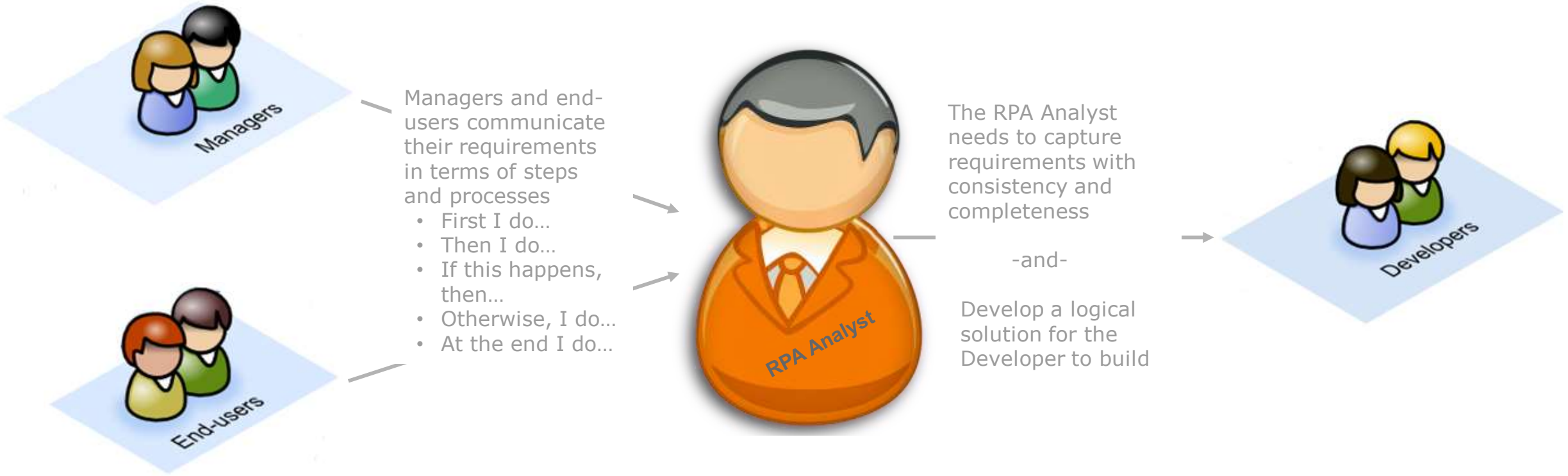
RPA Business Analyst Focus



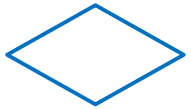
RPA Business Analyst Interactions



Flowcharting

- Flowcharting is a very effective collaboration, communication, and analysis technique
  - Flowcharts are diagrams that show the steps in a process
  - They are easy to create and understand
  - They help to keep everyone on the same page
  - Flowcharts can be created using commonly available tools such as Microsoft PowerPoint and Visio or do it online https://draw.io
- Flowcharts help RPA Analysts gain an accurate understanding of the "as-is" processes by creating a visual representation
- Flowcharts help RPA Analysts clearly articulate to the RPA Developer what the "to-be" solution should be

Flowcharting Basics – Frequently Used Shapes

	Process	The Process shape (rectangle) shows a step, task, or action to be done. This is the most frequently used shape in almost every flowchart.
	Decision	The Decision shape (diamond) denotes a question or a branch in the flowchart sequence. This shape indicates a point where the outcome of a decision dictates the next step. There are two possible outcomes - Yes or No.
	Data	The Data shape (parallelogram) is used to show input into a process or output from a process. Examples include receiving a report, getting an e-mail, getting an order, receiving data in some format, generating a report, sending an e-mail, faxing a message, etc.
	Document	The Document shape (rectangle with a curved bottom-left) represents a printed document such as report or invoice or spreadsheet. It can be single or multiple to represent the number documents.
	Terminator	The Terminator shape (oval) represents the first and last point in a process. Use words like Begin or End within this shape.
	Delay	The Delay shape (half oval) represents a waiting period where no activity is done. In process diagramming, delays are important to identify as they may result in adding to the cost and time of the process.
	Flow	The Flow shape (arrow) shows sequence and progression through the process.

Note: there are many more shapes available.
Refer to https://www.edrawsoft.com/flowchart-symbols.html

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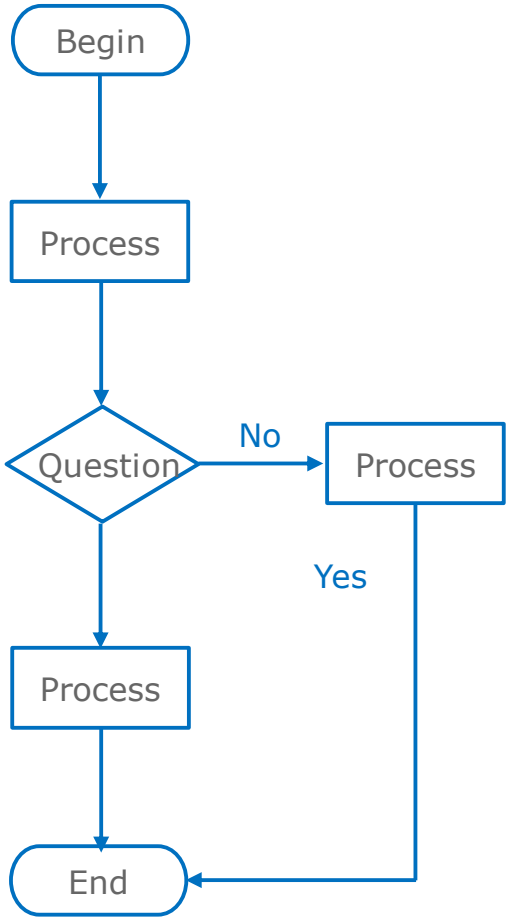
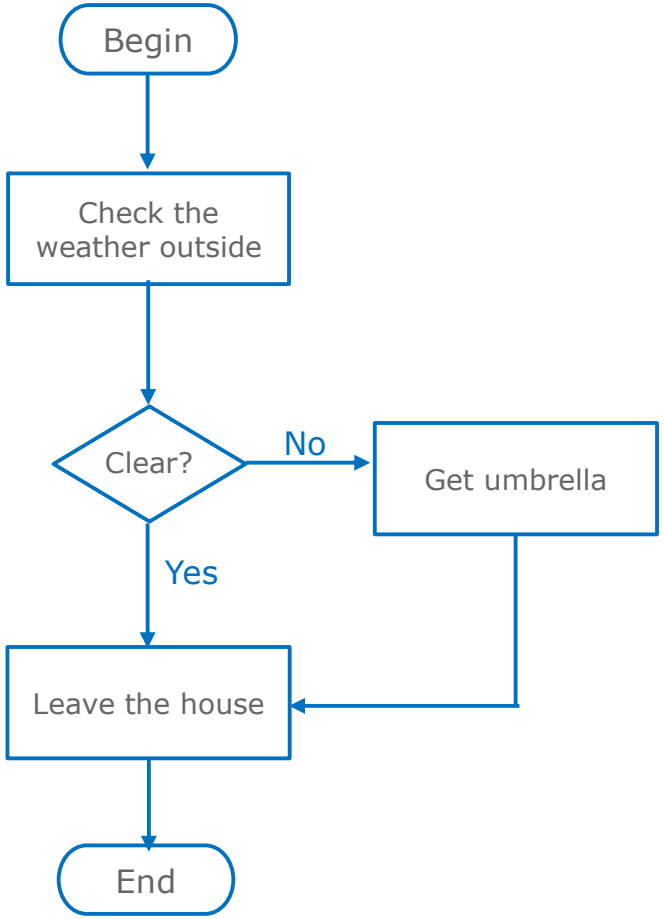
Guidelines for Drawing a Flowchart

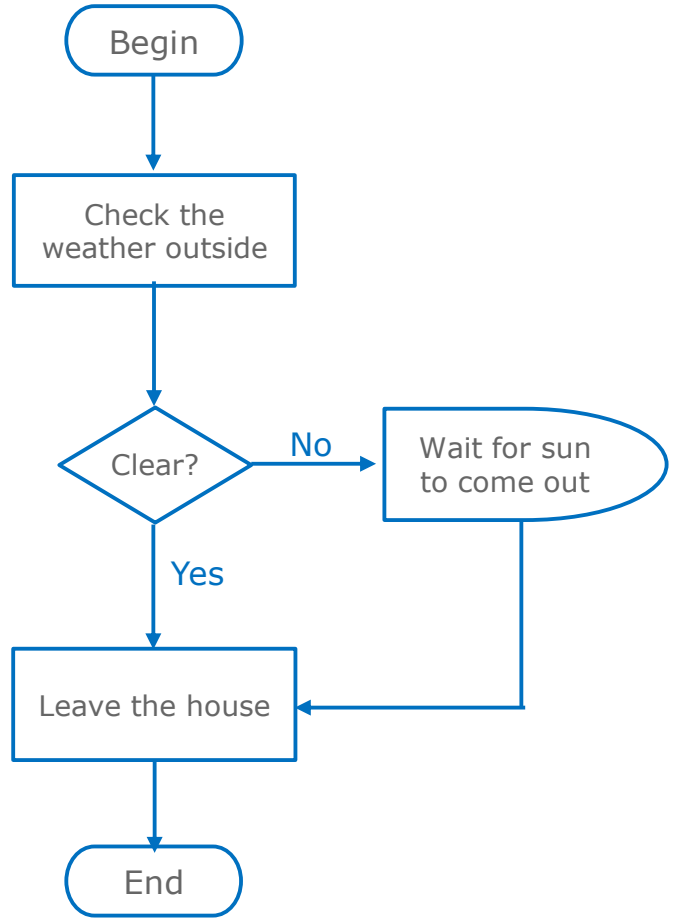
There are no official rules for constructing flowcharts, but here are best practices:

- Assemble the team who are to work on describing the process. These should include people who are involved in all parts of the process, to ensure that it gets described as it (actually) happens, rather than an idealized view.
- Agree on a standard set of symbols to use. Sometimes a company has its own standards.
- Flowcharts can be drawn top to bottom or left to right.
- Draw a Start terminator box at the top.
- Add the first box below the start box, identifying the first action simply by asking "What happens first?". Add an appropriate box around it.
- Add subsequent boxes below the previous box, identifying each action by asking, "What happens next?". Draw an arrow from the previous box to this one.
- Follow the process through to its logical conclusion.
- Conclude the flow chart with an End terminator box at the bottom.
- Conduct an end-to-end walk through of the process with the team to ensure completeness and accuracy.
- Start with a high-level flowchart and iterate to add more details.

Basic Structure of a Flowchart and Examples







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In-Class Discussion and Exercise

Create flowcharts for the following scenarios. Include at least one decision.

1. Make a glass of lemonade
2. Log in to Facebook
3. Stop work on a computer and shut it down
4. Take money out of the ATM
5. File an expense report and the company pays it

Cross Functional Flowcharting

- In most organizations, processes span multiple people and departments
- Standard flowcharts cannot indicate who is responsible for what unless explanatory text boxes are added
- Cross functional flowcharts show the relationship between the steps in a process and the departments or functional areas that are responsible for those steps by using swim lanes
- Swim lanes are drawn side-by-side, each lane is allocated to a persona or a group, and process steps which are performed by that persona/group are drawn in that lane
- This makes it easy to map out the complete process, the roles, responsibilities and the inter dependencies of a given persona or group and process complexity
- This format helps teams to see what their team and the other teams need to accomplish (and when)
- Using swim lanes are an effective way to *un-complicate diagrams* that would otherwise be overly complex.

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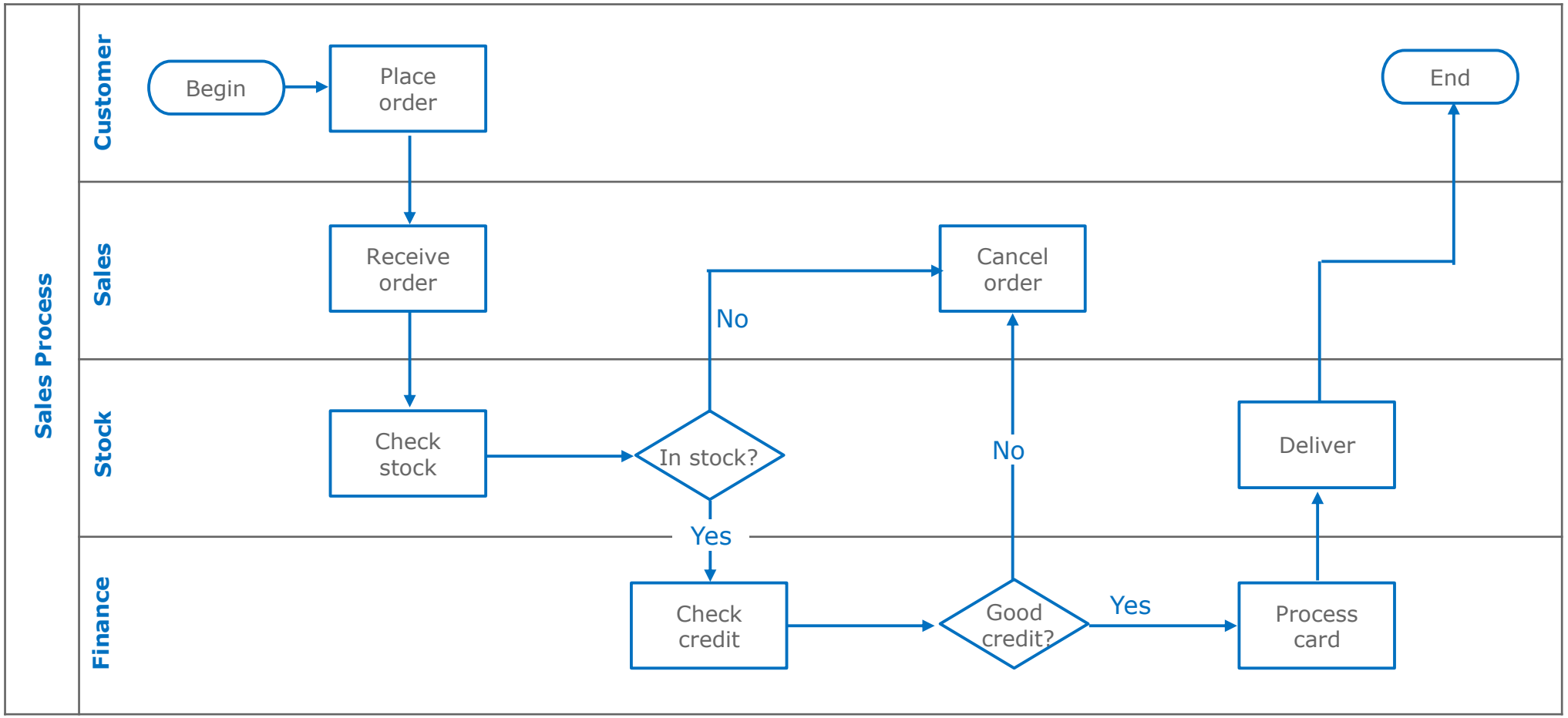
Example of Cross Functional Flowchart – Sales Process



In-Class Discussion and Exercise

Create cross-functional flowcharts for the following scenarios.

1. Take money out of the ATM
2. File an expense report and the company pays it

Recap of the process to follow:

1. Identify departments, personas
2. Create separate swim lanes for each
3. Place the steps in the swim lane that is responsible and connect them

Hint: you may end up with more detailed flowcharts than the previous exercises

Knowledge Check

Which stakeholders does the RPA Business Analyst work with?

a) Legacy application support

✓ b) Subject Matter Experts

✓ c) Developers

d) All of the above

The RPA Business Analyst is responsible for what type of feasibility analysis?

a) Regulatory

b) Financial

✓ c) Technical

✓ d) Business

What are the benefits of flowcharting?

- ✓ a) Easy to create and understand
- ✓ b) Visually represents the steps end users take
- ✓ c) Keeps everyone on the same page
- d) It’s a highly technical programming tool as well

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Which symbol represents a process?

✓ a) Rectangle

b) Diamond

c) Parallelogram

d) Oval

Which symbol represents a decision?

a) Rectangle

✓ b) Diamond

c) Parallelogram

d) Oval

Which symbol represents a delay?

a) Rectangle

b) Diamond

c) Parallelogram

✓ d) Half Oval

How are cross functional flowcharts created?

a) Explanatory notes

✓ b) Swim lanes

c) Nested processes

d) All of the above

Assignment

All of us at one point in time have had to get a prescription filled. Using the techniques learned in this unit, work in small groups to do the following:

1. Determine all individuals, departments, and groups involved in the process.
2. Brainstorm the steps in the process. The specific sequence is less important than determining all of the steps for this assignment.
3. Construct a cross functional flowchart graphically using Microsoft PowerPoint in two steps:
    a) High level flowchart
    b) Detailed flowchart
4. Review the flowchart and validate its accuracy amongst your team. Be sure to include all possible scenarios when getting a prescription filled.
5. Submit both versions of your flowchart

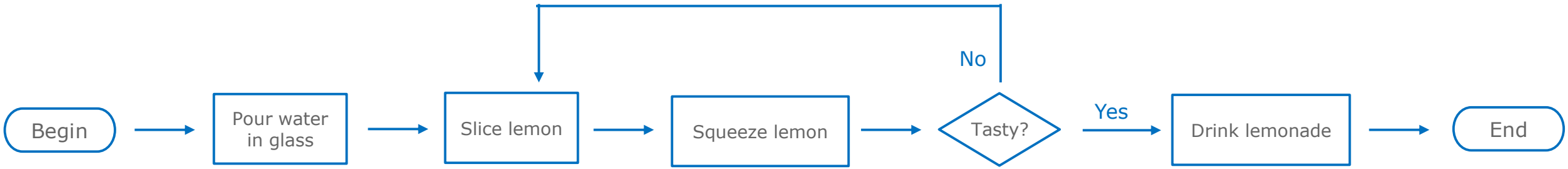
Summary

In this Unit, you learned:

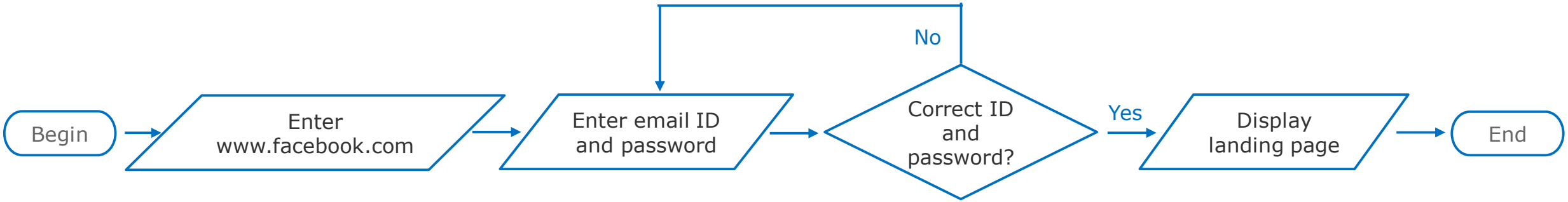
- The role of the RPA Business Analyst
- Interactions between the RPA Business Analyst, End Users, and RPA Developer
- Process decomposition/flowcharting
- Advanced cross functional flowcharting

Appendix – flowchart solutions

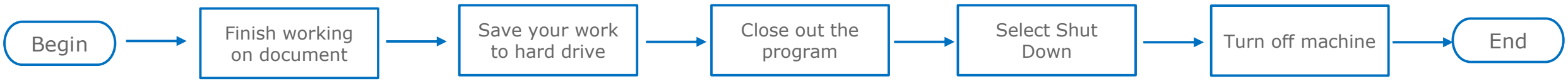
Make a glass of lemonade



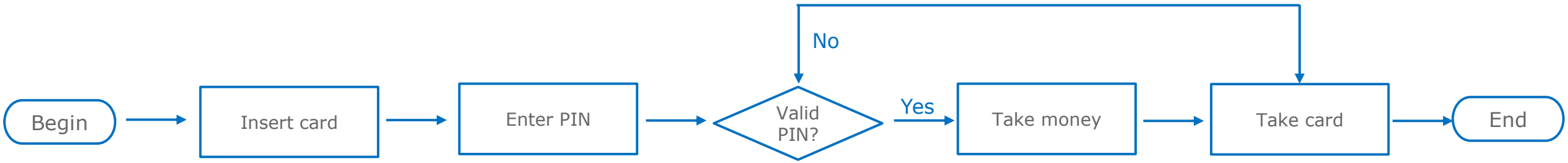
Log in to Facebook



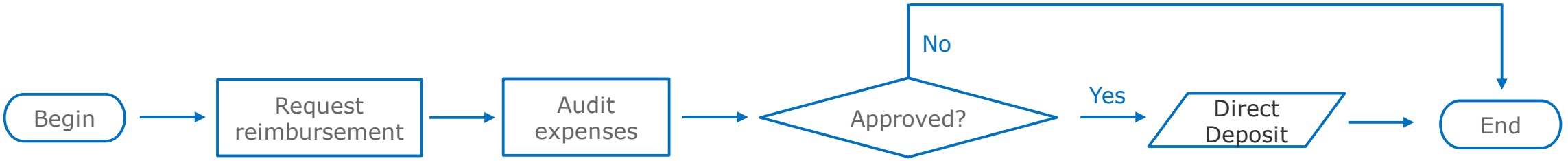
Stop work on a computer and shut it down



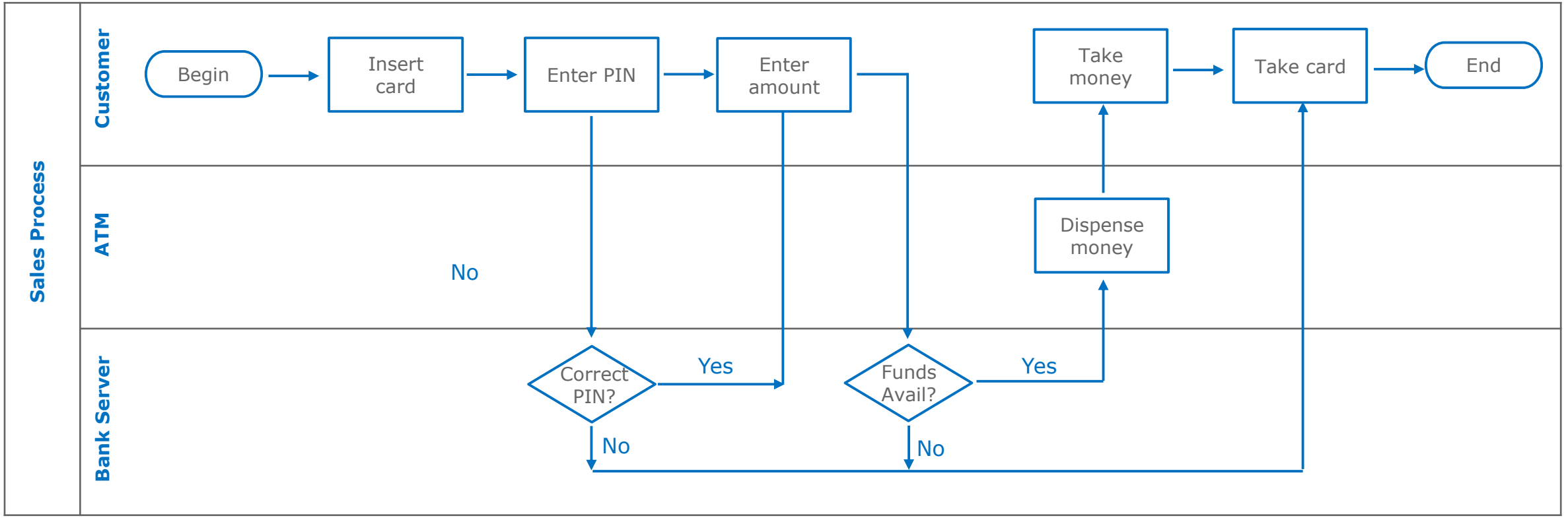
Take money out of the ATM



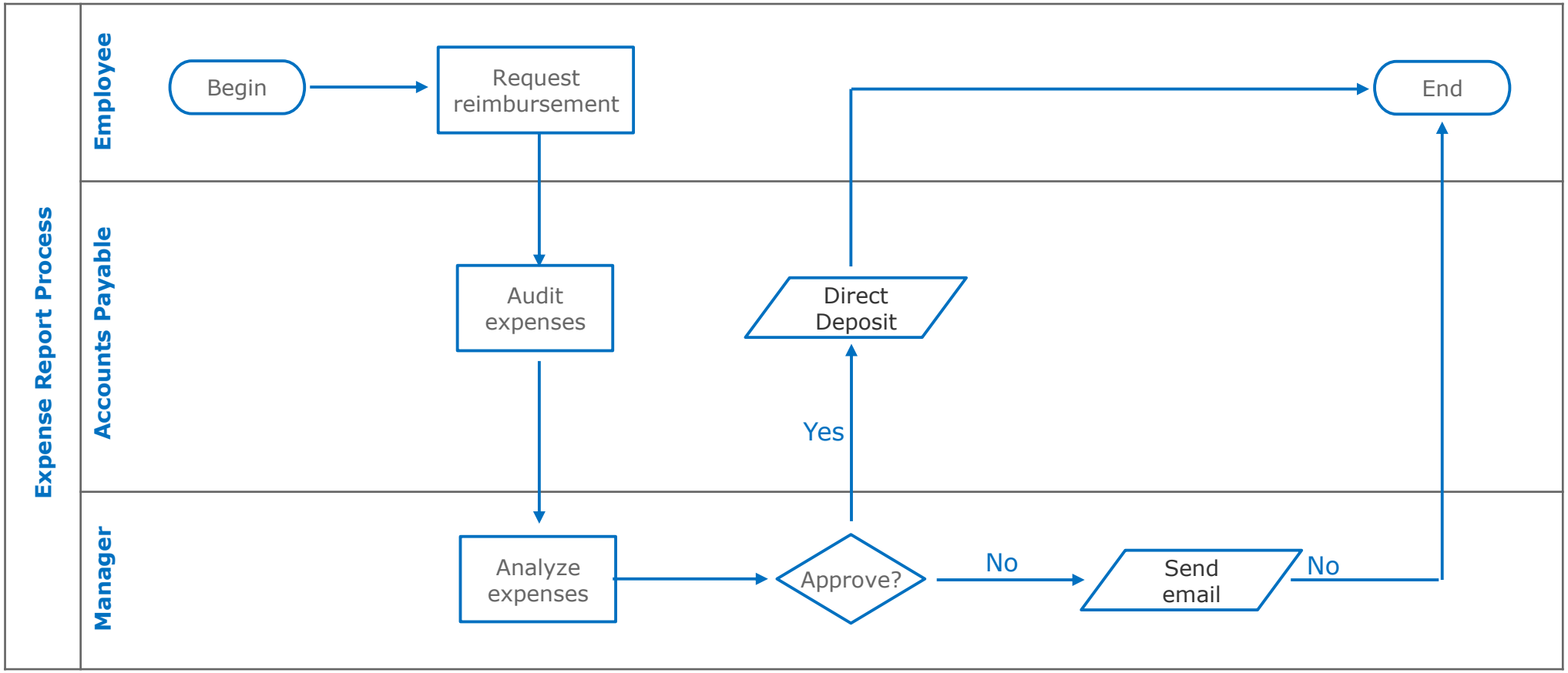
File an expense report and the company pays it



Take money out of the ATM – Cross Functional



File an expense report and the company pays it - Cross Functional



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Unit 3-RPA Business Process Design

Instructor Name

Course Number – Course Name

Learning Objectives

In this Unit, you will learn:

- Processes and workloads that are candidates for RPA
- Future state process design
- Business value metrics and feasibility
- RPA program management office

Agenda

Topics

• Candidates for RPA	10 mins
• Designing Future State	10 mins
• Classroom discussion and exercises	30 mins
• Business metrics and feasibility	15 mins
• RPA program management office	5 mins
• Knowledge check	10 mins
• Assignment overview	5 mins

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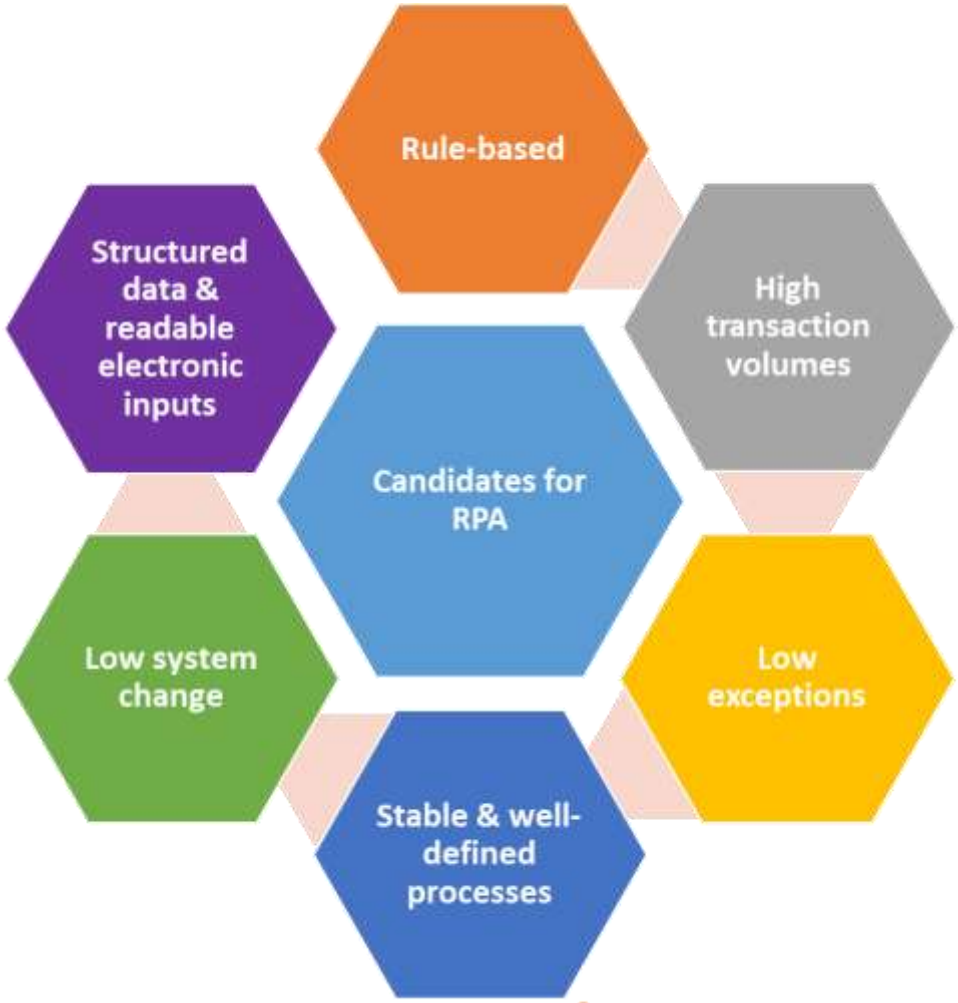
Candidates for RPA – Look for the following processes

- Rule based - processes where "if then…" logic can be applied without involving any human decision
- Structured data and readable electronic inputs – allows the robot to recognize, ingest, and process data consistently
- Low system change – network and infrastructure configurations are not expected to change measurably
- Stable and well-defined processes - processes which are repetitive and performed in the same way for the past 6 months and no frequent changes are expected in the near future
- Low exceptions – processes execute the same 80-90% of the time
- High transaction volumes – gain a good return on investment for automation



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What can Bots Do?

- Launch and execute applications including
  - Opening emails and attachments
  - Logging into applications
  - Moving files and folders
- Integrate with enterprise tools by
  - Connecting to system interfaces
  - Reading and writing to databases
- Augment data
  - Scrape data from the web including social media
  - Access data from web-based sources
- Data processing
  - Follow logical rules such as “if/then” rules
  - Make calculations
  - Extract data from documents
  - Input data to forms
  - Extract and reformat data into reports or dashboards
  - Merge data from multiple sources
  - Copy and paste data

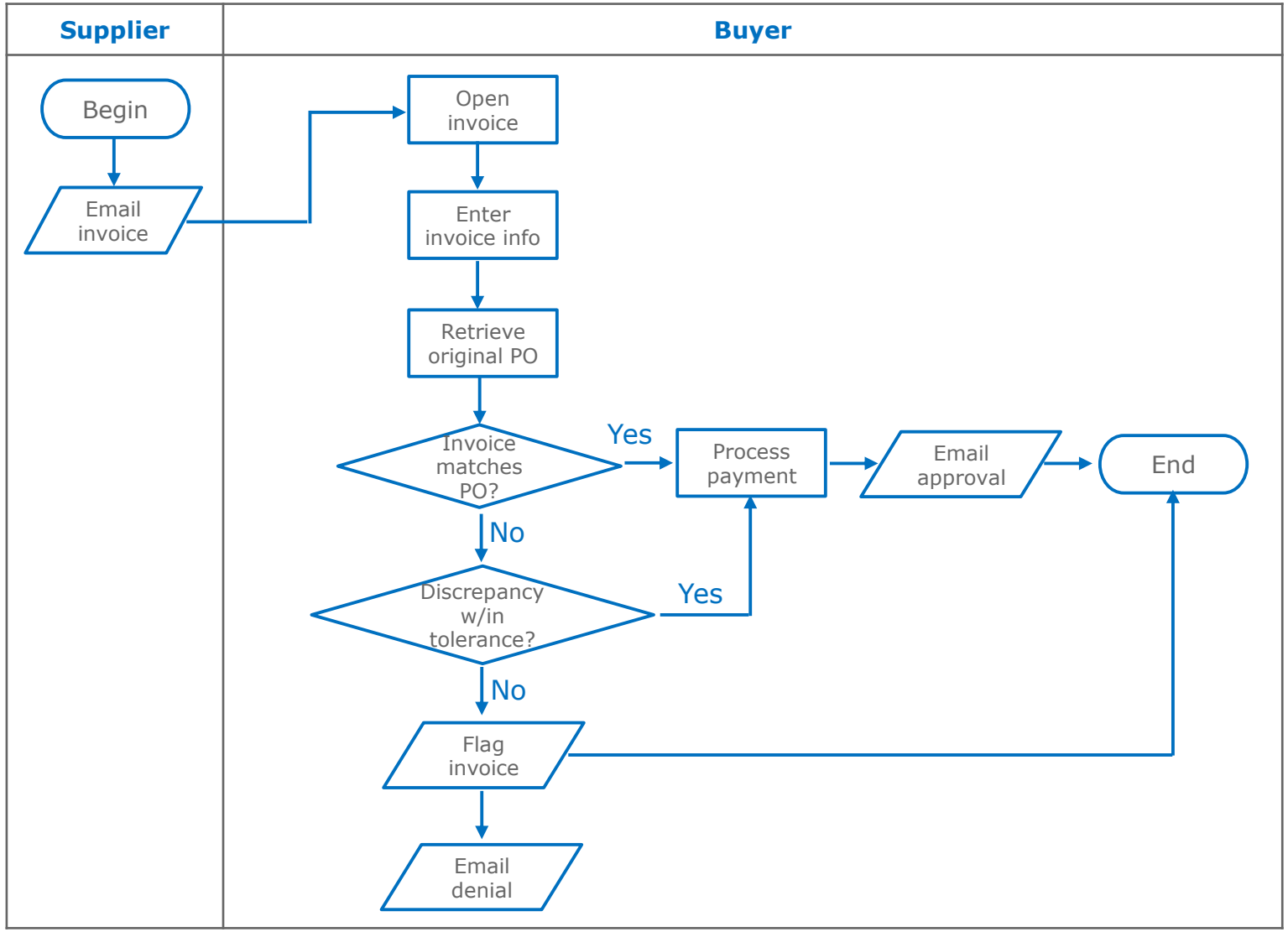
When Designing Process Future State…

Look for the following:

- Is the user looking up information? From internal systems? External web sites?
- Does the user have to log into more than one system?
- Is data coming from external systems, Excel, PDF, hand-written, or forms?
- Is data being re-keyed in? Copied? Pasted?
- Is data from two or more systems being manually compared? Then a decision is made?
- Are emails being generated?

Identify where RPA can be built into the Future State process

Example - Invoice Processing Current State



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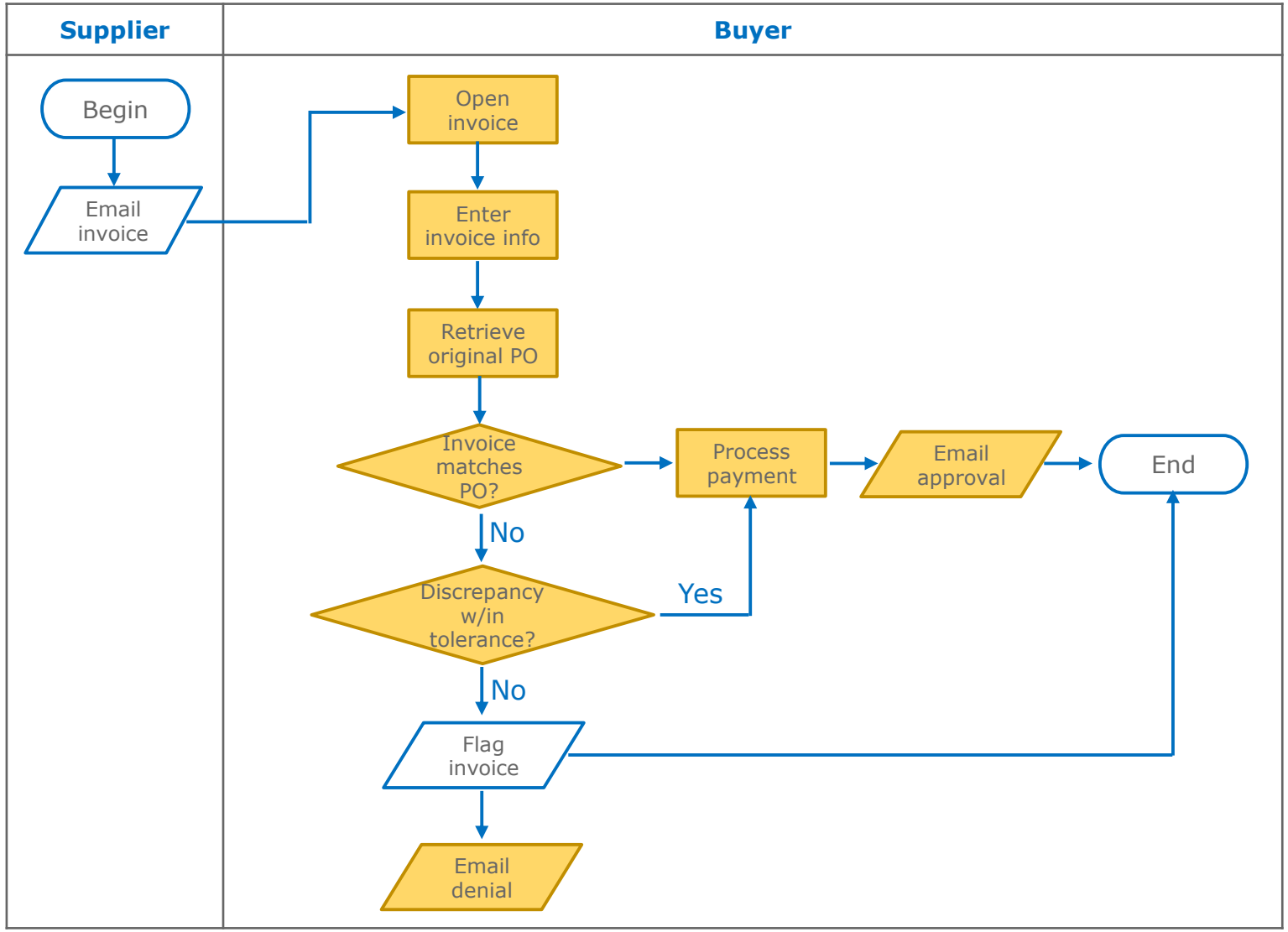
Example - Invoice Processing Future State Design



= utilize RPA

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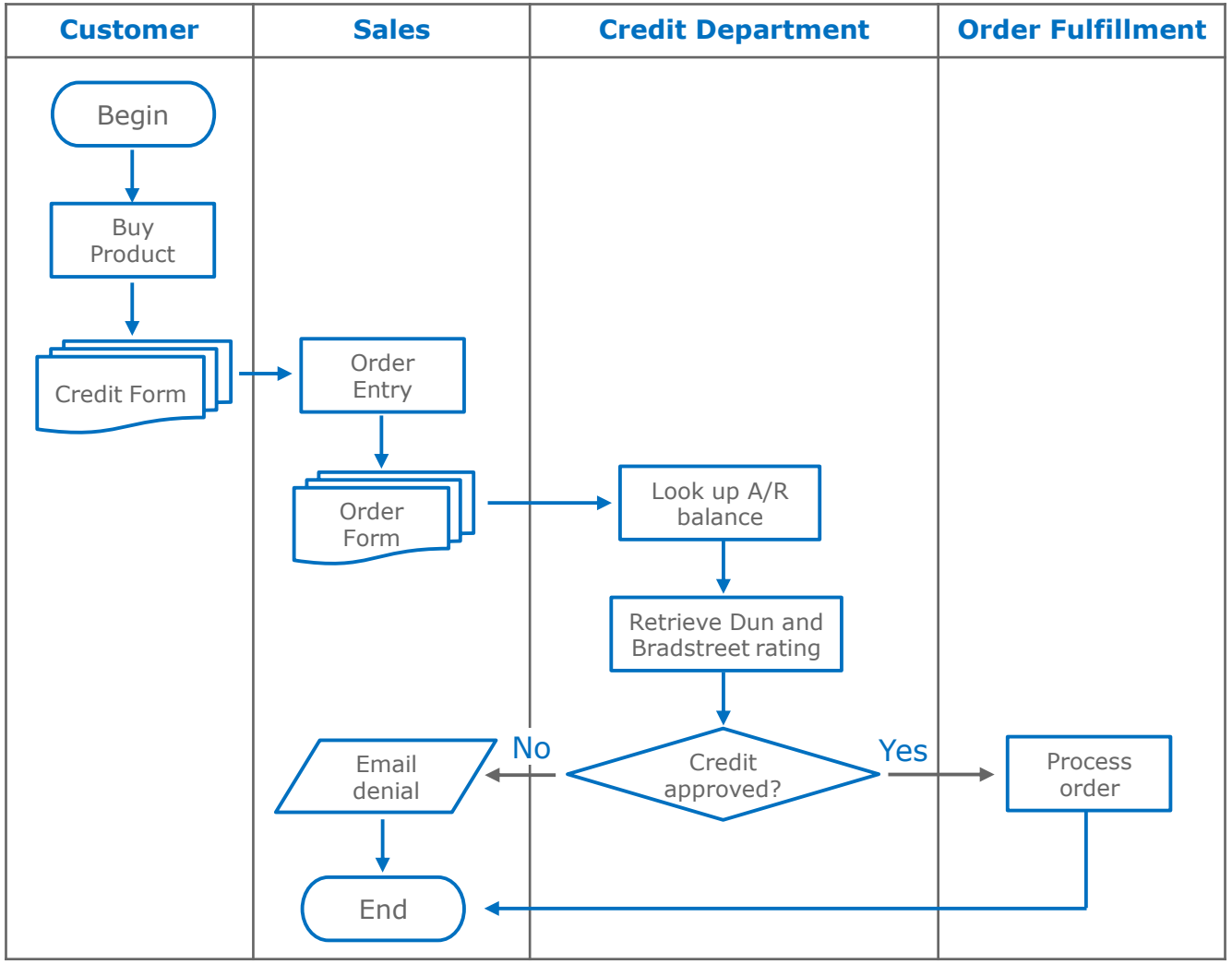
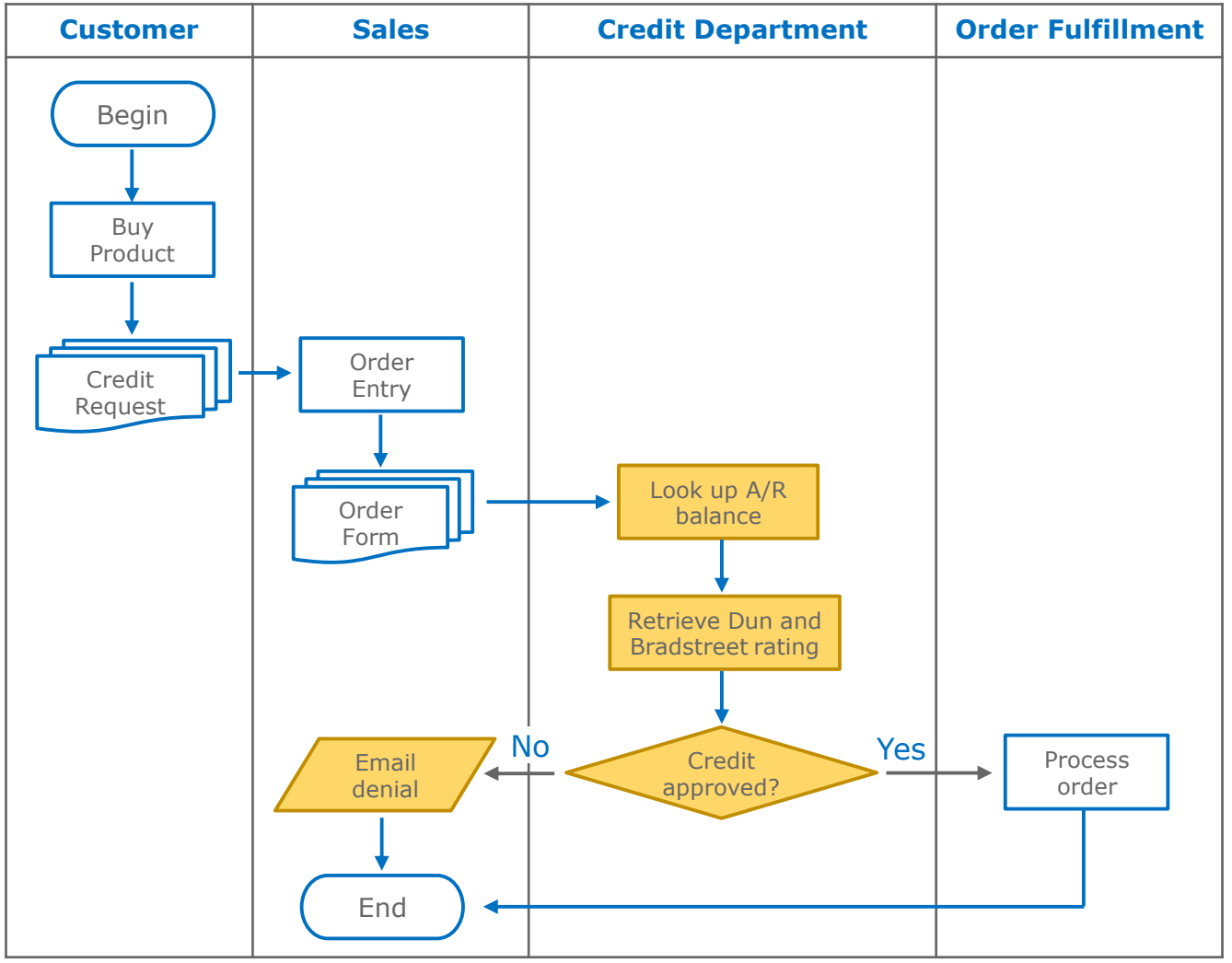
Example - Credit Check Current State



Example - Credit Check Future State Design



= utilize RPA

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In-Class Discussion and Exercises

For the following use cases, create the Current State diagram and Future State RPA Design:

1. You have a list of customer addresses in an Excel spreadsheet that are missing zip codes. Use the United States Postal Service (USPS) web site to find the correct zip code and then update this information in your company's Customer Relationship Management (CRM) system.
2. You are a tax preparer. Your clients have sent you their W2 forms which you need to enter into the tax preparation system.
3. You are a retail pricing analyst and need to check 3 competitors' prices daily. If the competition's online prices are within 5% of your prices, you must immediately lower your prices and make the updates in your Order Management system, Invoicing system, and on your web site.
4. You are a mortgage processor and need to put all the required documents that are coming in from different sources into a single folder to send to underwriting.

Business Value Metrics

- Financial
  - Cost savings
  - Return on investment
- Operational
  - Increased process accuracy
  - Reduced process cycle time
  - Increased employee productivity
  - Increased SLA compliance
  - Fewer resources required
- Business Impact
  - Improved customer experience
  - Increased up sell/cross sell
  - Increase revenue

ROI Analysis

Yearly Benefits	Initial Cost	Year 1	Year 2	Year 3	Year 4
Manual hours saved		$ 52,000	$ 52,000	$ 52,000	$ 52,000
Error reduction		$ 26,000	$ 26,000	$ 26,000	$ 26,000
Productivity gain		$ 7,800	$ 7,800	$ 7,800	$ 7,800
Business Agility		$ 29,500	$ 29,500	$ 29,500	$ 29,500
Compliance		$ 24,500	$ 24,500	$ 24,500	$ 24,500
Branding & Customer Satisfaction		$ 15,000	$ 15,000	$ 15,000	$ 15,000
Total per period:		$ 154,800	$ 154,800	$ 154,800	$ 154,800
Yearly Costs	**Initial Cost**	**Year 1**	**Year 2**	**Year 3**	**Year 4**
Tool Platform cost	$ 18,000				
Annual maintenance and support	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000
Consultant services and training	$ 10,000				
Total per year	$ 32,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000

Feasibility

- Complexity
- Deployment effort

Business Unit	
Business Unit Vertical	
Process Name	Unit 3 Invoice Processing example
Project Manger	
Team Size in "As Is" Process	

Feasibility Index
32
High

Note: Pls respond to following questions in the context of you identified Process

	Sr. No.	Question	Operations Response
Process Input	1.1	What percentage of your input is in scanned format? (e.g TIFF, PDF, TIFF mail attachment etc)	51-80%
	1.1.1	Do you have access to the scanned data in electronic format?	Yes
	1.2	What percentage of your input is in electronic format which allows Ctrl C and Ctrl V? (e.g. Workflow Tool, Data Base, Excel, email using standard template in mail body or as an attachment etc.)	51-80%
	1.3	What percentage of your input is unstructured i.e. free flow text? (e.g. email body, notes)	0-15%
	1.4	In case of structured data is there a standard template/layout? (e.g. Excel, email body, PDFs..)	Yes
	1.4.1	Are there frequent updates in the template?	Very Rare
Technical Feasibility	2.1	Does Process involve working in Citirix?	No
	2.1.1	*If 'Yes' :* Can you do Ctrl+C of the data field you want to read and do Ctrl+V on the application you want to move the data?	No
	2.1.1.1	*If 'No':* Can the data be extracted from any other system?	Yes
	2.4	Does the process include judgemental decision making, considering multiple criteria? (e.g. Credit Assessment)	No
	2.5	What percentage of volume has a dependency on clarification from the customer through calls/emails?	0-15%
Volumetric	3.1	How many full time employees (FTEs) are involved in process?	
	3.2	What is the average daily volume flowing through the process?	
	3.3	What is the average handling time?	
Notes		**Comments:**	

Complexity assessment

Metric	Workflow 1	Workflow 2	Workflow 3
Manual hours (Monthly)	21 - 40	5-10	100
Personnel Quantity (People)	4 - 6	1-2	15
Departments	1 - 2	1 - 2	10
Technology landscape	3- 4	3- 4	8
Information silos	10- 15	10- 15	25
Process steps	150	150	300+
Data Size (Records/Rows)	1000	500	1500+
Business Logic (Complexity)	Medium	High	High
Deployment (Complexity)	High	Medium	High
Standardize (Complexity)	Medium	Low	High
Estimated Development Effort	4 weeks	2 weeks	Consult Experts
Estimated Standardizaton Effort	2 weeks	1 week	2 weeks+

RPA Program Management Office (PMO)

- Many organizations have successfully implemented a few RPA projects but are uncertain as to how to drive continuous improvement and digital transformation
- An RPA PMO manages the full lifecycle of RPA, from sponsoring opportunities, developing the business case, supporting the development of bots, and instituting standards
  - Organization – defines role and responsibilities. Responsible for acquiring and training new resources.
  - Governance - establishes RPA standards, procedures, and policies. Ensures that compliance regulations, information security requirements, and regulatory standards are met.
  - Technology – selection of the right automation tools for appropriate tasks. Also take care of the maintenance and support aspects of these tools.
  - Processes – executes and monitors the complete life cycle of assessment, development, testing, and deployment throughout the organization. In charge of evaluating automation opportunities, deploying RPA into suitable environments with a stable, scalable support structure.
  - Operations – managing job descriptions, operational change management, and organizational structure.
- Program Management Office is sometimes referred to as a Center of Excellence (COE)

Knowledge Check

What are rule based processes?

a) Network and infrastructure is not expected to change

✓ b) Where if-then logic can be applied

c) Processes that are repetitive and performed in the same way

d) Processes that are the same 80-90% of the time

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What does low system change mean?

✓ a) Network and infrastructure is not expected to change

b) Where if-then logic can be applied

c) Processes that are repetitive and performed in the same way

d) Processes that are the same 80-90% of the time

What defines stable processes?

a) Network and infrastructure is not expected to change

b) Where if-then logic can be applied

✓ c) Processes that are repetitive and performed in the same way

d) Processes that are the same 80-90% of the time

What are low exception processes?

a) Network and infrastructure is not expected to change

b) Where if-then logic can be applied

c) Processes that are repetitive and performed in the same way

✓ d) Processes that are the same 80-90% of the time

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Bots can integrate with enterprise tools by…

a) Scraping data

b) Performing calculations

✓ c) Connecting to system interfaces

✓ d) Reading and writing to databases

Network and infrastructure is not expected to change

Where if-then logic can be applied

Pro ✓ a) Opening emails and attachments

Pro ✓ b) Logging into applications

✓ c) Moving files and folders

d) Trouble-shooting applications

What are things to look for when designing a Future State?

a) Is the user looking up information from a web site?

b) Is the user copying and pasting data from one system to another?

c) Is data from multiple systems being compared?

✓ d) All of the above

What are examples of business value metrics?

a) Financial

b) Operational

c) Business Impact

✓ d) All of the above

How is feasibility determined?

a) number of sprints

✓ b) complexity

✓ c) deployment effort

d) Oval

What are the responsibilities of an RPA PMO?

a) organization

b) governance

c) technology

✓ d) all of the above

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Assignment

The employee separation process in any company process can be quite involved. Here is an example of affected departments, organizations, and systems:

- Employee
- HR
- Management
- IT
- State (unemployment, COBRA…etc)
- Health insurance carrier
- 401K and stock options fund

Work in small groups to develop what you think is the current, most common way companies process separations. Highlight those areas where RPA can be applied. Submit both Current State and Future State Design diagrams.

Be sure to cite any information sources or web sites you use in your research.

Summary

In this Unit, you learned:

- The characteristics of processes that make them suitable for RPA
- The main categories of what bots do
- How to identify where automation can be applied (future state process design)
- Financial, operational, and business metrics
- Techniques to determine feasibility
- The responsibilities of an RPA program management office (PMO)