



Business Analyst Training

Opportunity Assessment

Aim & Approach



Pre-requisite

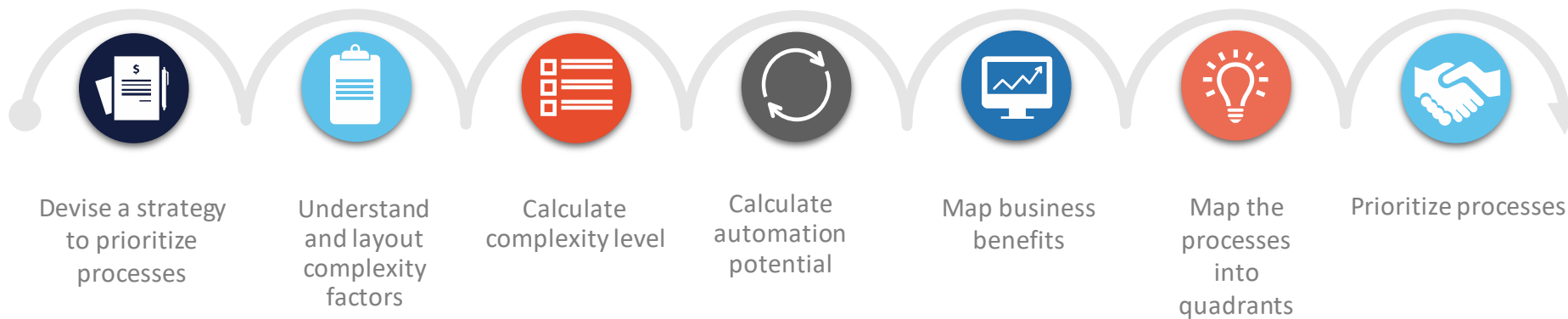
- An high level approach of scoping processes at organizational level for Automation journey with the help of industry heat maps, Organizational charts, understanding of business units with automatable processes.



Aim

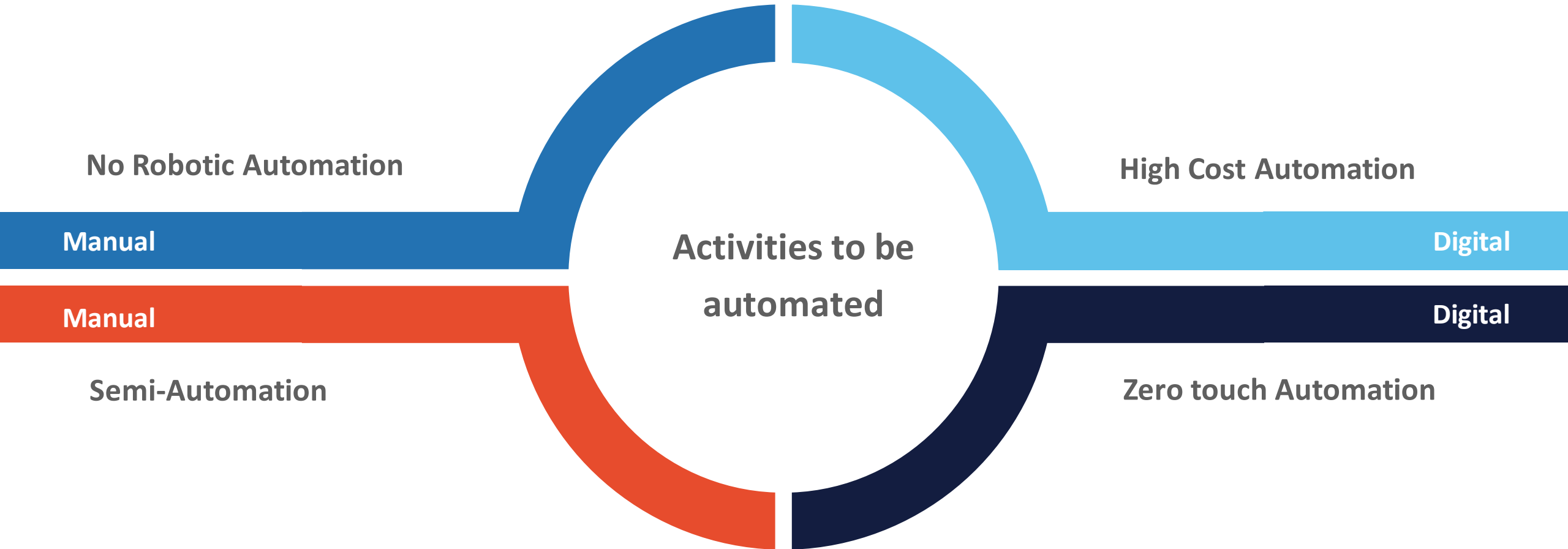
- Ability to calculate and understand automation complexity of the in-scope processes
- Ability to calculate and understand automation potential of in-scope processes
- Ability to Map Automation benefits (Tangible & Intangible benefits)
- Ability to Map the processes into automation quadrants in-order to prioritize in-scope processes

Approach



RPA Implementation Strategy

Highly frequent process and (system) environment change



Static process and (system) environment

Organization wide assessment

Complexity



- Defined as Low(<30%), Medium(30-60%) and High(>60%)
- Derived based Input methods, Application type, Free text, Environment and no of applications involved

Potential FTE Savings



- Derived from key parameters like % of Rule based steps, Input Methods, Free Text and type
- Yields a high level Potential FTE benefits and automation percentage

Automation Quadrant



- Derived as a matrix based on Process Complexity and potential benefit (High / Medium / Low)
- Classified as Quick Win, Low Hanging Fruit, Must Do Improvements and Long Term Improvements

Complexity Factors

Number of screens involved in a process can be taken as a proxy for number of steps

Variations/ Scenarios within the process (Number of If Else kind of Rules)

Standard Inputs – Templated inputs, same format or type of inputs across cases

Image based automation
– VDI/ Remote desktops/
Citrix

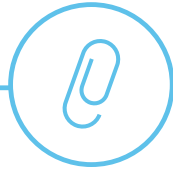
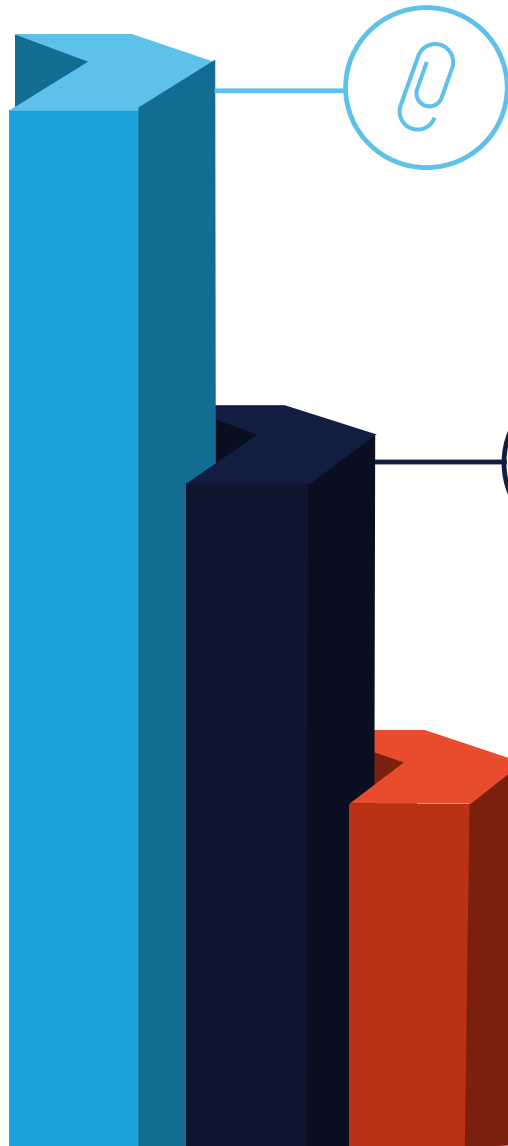
Free Texts – Flow of information as free text (Unstructured informational flow) within the process

Structured Inputs – Machine readable and digital inputs. Scanned PDF Images/ Free flow texts in Emails are considered to be unstructured inputs

Type of Applications – Java Applications, Mainframe applications, SAP, Web based applications, Dotnet applications, MS Office .. Etc



Defining automation complexity



A **HIGH** complexity project is one that requires programming skills (.NET programmability) in terms of string manipulation functions, working with arrays, data tables, collections, data formatting, exception handling; complex SAP applications, and/or complex applications running in a Citrix environment, and/or terminal emulators. **Development time is 4-6 weeks.**



A **MEDIUM** complexity automation project could be one that requires the transfer of data between applications or one that involves SAP or applications running in a Citrix environment. It takes around **3-4 weeks to develop.**



A **LOW** complexity automation project is in general, one that can be easily created with the recorder and requires small customizations thereafter. This includes desktop applications as well as web applications. It can include scraping (web scraping, screen scraping) and it generally takes **1-2 weeks for Development**

Factors driving automation potential

Process Type

- Manual & Repetitive - A process which is performed by user and most of the process steps are same for all cases or transactions.
- Semi Manual & Repetitive - A process which is performed by user and also involves any automation mechanism like Macro, Outlook plug-ins, etc.
- Automated - A process is already automated. Specify using what in comments
- Manual But Not Repetitive - A process which is performed by user and process steps for each case will not be same.

Rule Based

- Agent/user doesn't use his/her experience to take any judgement or make decisions while processing a case but on the business rules and pre defined logic

Standard Input

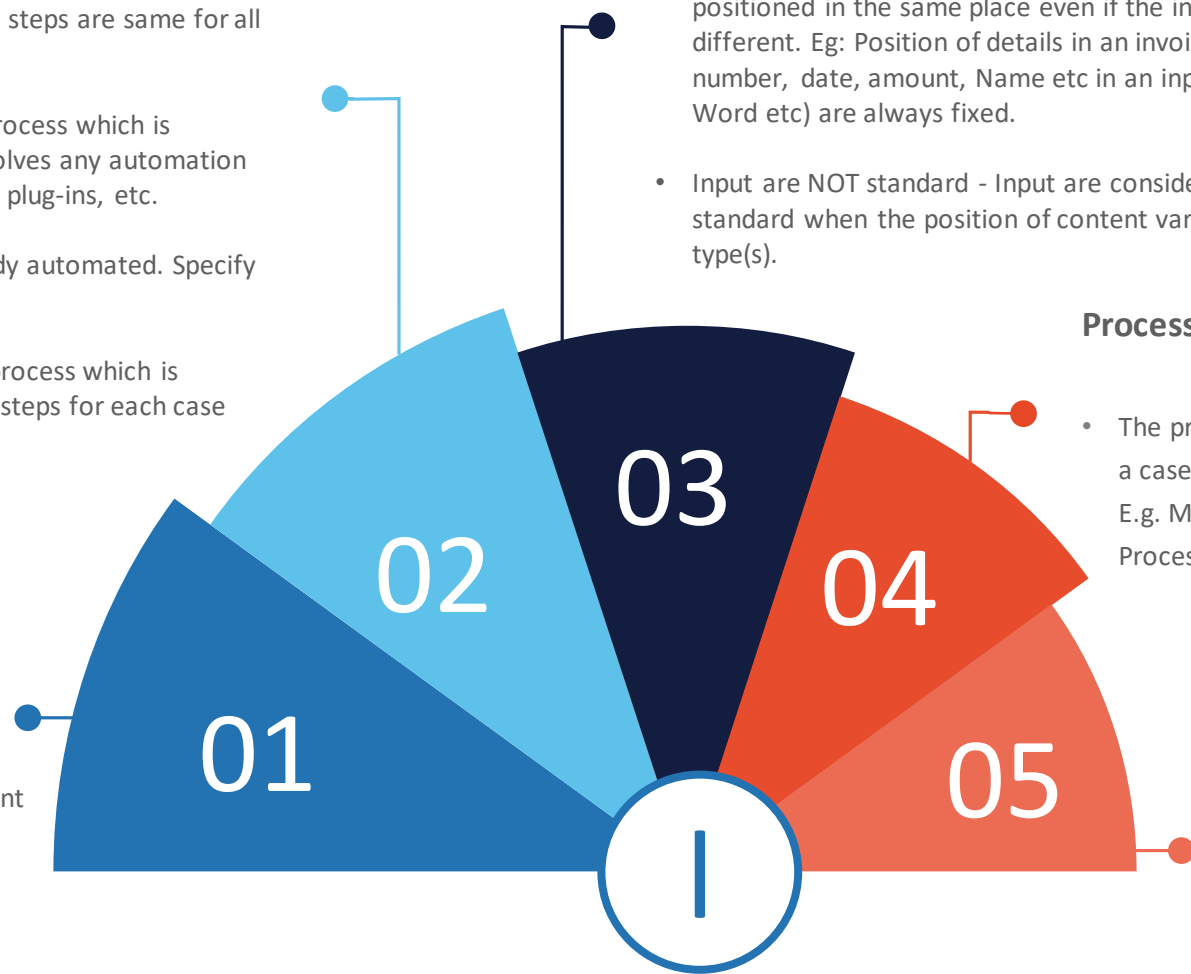
- Input are Standard - Inputs are standard if the content is positioned in the same place even if the input types are different. Eg: Position of details in an invoice like Invoice number, date, amount, Name etc in an input type(PDF, Word etc) are always fixed.
- Input are NOT standard - Input are considered as not standard when the position of content varies in the input type(s).

Process or applications used

- The process or applications used to process a case going to change within 3 - 6 months. E.g. Major upgrading in ERP systems, Process re-engineering etc

Unknown Exceptions %

- %age of the total volume received cannot be processed which cannot be processed without an external factor(query/approval).



Business Benefits

Cost savings through RPA in terms of FTE reduction

Business Agility – Enabling business to act at a faster pace than earlier.

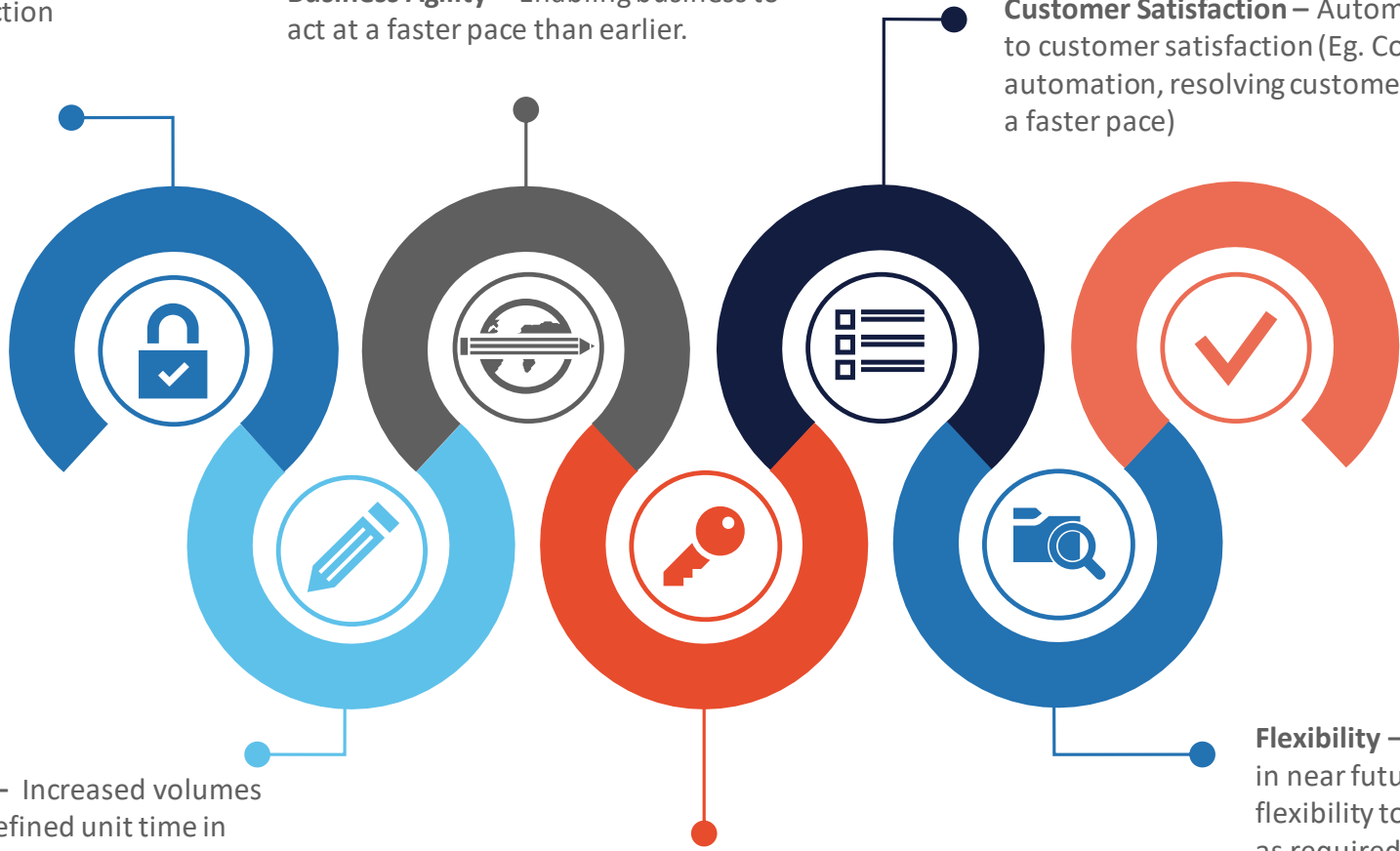
Customer Satisfaction – Automation leading to customer satisfaction (Eg. Contact center automation, resolving customer inquiries at a faster pace)

Compliance – Ability to comply to regulatory requirements.

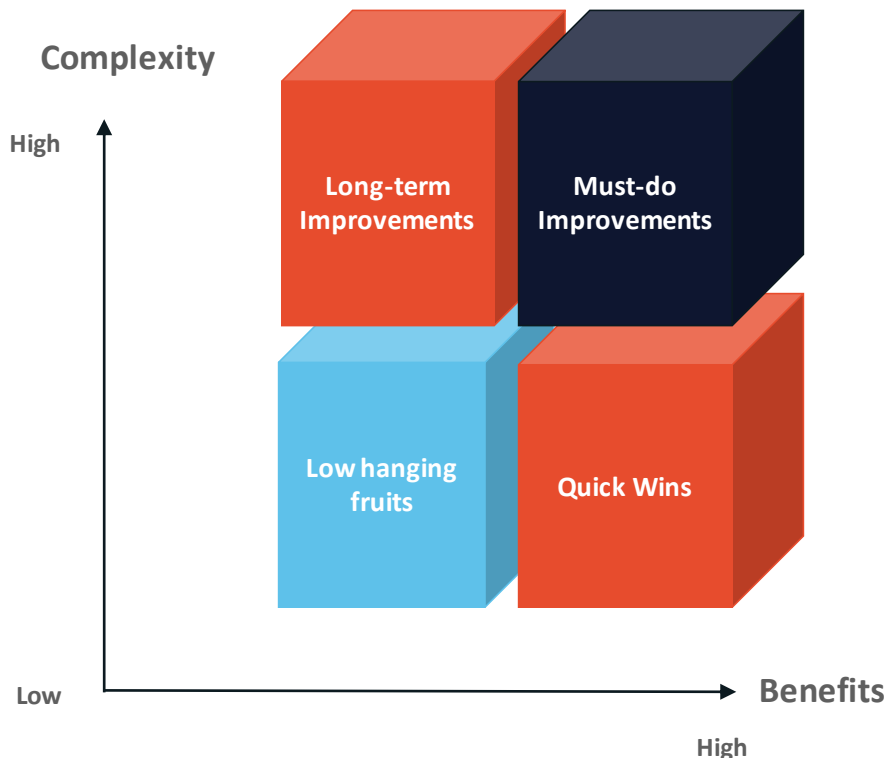
Productivity Gain – Increased volumes processed in the defined unit time in parallel with the decrease of the turnaround time and AHT Improvement

Quality improvements/ Error reduction – Robots run as configured with 0% Error rate.

Flexibility – Expected spike in volume in near future, Bots enabling flexibility to scale up and scale down as required



Organization wide assessment



Complexity	Benefits	Automation Quadrant
Low	High	Quick Win
Low	Medium	Quick Win
Medium	High	Quick Win
Low	Low	Low Hanging fruit
Medium	Medium	Low Hanging fruit
High	High	Must-do Improvements
High	Medium	Must-do Improvements
Medium	Low	Long Term Improvement
High	Low	Long Term Improvement
Low	High	Quick Win



Additional Process Prioritization Factors like Business reasons (e.g. Foreseeing spikes in volume), Regulatory & Compliance reasons, parallel initiatives needs to be considered

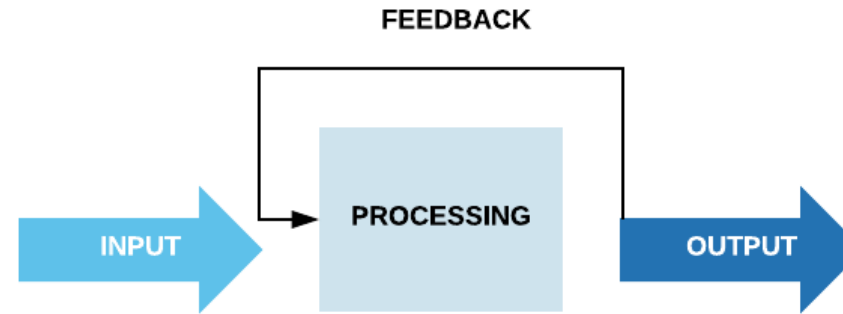
Organization wide assessment

	Pilot M1-M3	1 st Wave M4-M7	2 nd Wave M7-M10	3 rd Wave M10-M14	4 th Wave M12-M17	Closure M16-M18
Activity	Choose use case from Critical Quick Wins or Important low hanging fruits	Build show case	Close Quick Wins	Close Quick Wins and low hanging fruits	Close Must-do Wins	Close Must-do Wins, Quick Wins, Low hanging fruits
Activity	Create Value Proposition Show Case	Increase confidence and buy-in	Ensure industrialized Automation deployment			Hand over Strategic and Long-term Improvements
Activity	Highlight risks and org. change management impact	Prepare Employee Experience show case "How did Robotic Process Automaton impact my work experience?"	Create role-based virtual worker libraries			
Activity	Obtain buy-in		Start re-assessment			

Opportunity assessment – The questionnaire

GENERAL

- Process Name
- Process location & region
- SME name



OUTPUT

- Description

INPUT

- Inputs are standard?
- Data Inputs Type
- Data Inputs Type – Comments
- Does this process requires reading of Scanned Images or Handwritten Documents?
- Does the process includes reading of Free Text?

PROCESS METRICS

- No. of FTE's
- Number of Cases/ Transactions
- Process Frequency
- AHT
- No of steps

PROCESS DESCRIPTION

- Language
- High-level description
- Quality check? & Quality check (%)
- Is the Process Manual & Repetitive?
- Rule based process?
- Is the process or system expected to be changed within next 3-6 months
- %age of Unknown Exceptions

IT ENVIRONMENT

- Technology/ System Constraints
- Are there any steps in the process which are already automated using any tool or utility?
- Is there a test environment available?
- Application Access Via Citrix/Remote Desktop?
- No of apps

Thank you!
