

Step 1: Identify, evaluate and prioritize processes



Identify processes – How to

- 1) Establish interest and understanding of RPA
- 2) Run workshops with different business functions to identify processes with an automation potential

Create a long list of processes with an automation potential!

Identify processes – Long list

Process name	Process trigger	Process steps (high level)					Estimated number of hours spent on process (yearly)	Estimated automation potential (% of process that can be automated)	All systems the process interacts with
Post invoices	Time	Login to application	Search for invoices	Control invoices	Post invoices	Close application	5000	80%	Invoice application, outlook
Reconciliate bank accounts	Date	Login to ERP	Extract bank account balances	Login to bank	Extract bank account balances	Reconciliate and report	1000	100%	ERP, bank account, excel, outlook

Evaluate processes – how to

Process name	Process trigger	Estimated number of hours spent on process (yearly)	Estimated automation potential (% of process that can be automated)	All systems the process interacts with	Est. No of hours spent on process X Est. Automation potential	Priority
Post invoices	Time	5000	80%	Invoice application, outlook	4000	1#
Reconciliate bank accounts	Date	1000	100%	ERP, bank account, excel, outlook	1000	#2

We evaluate the most promising processes using an automation matrix



Evaluate processes – automation matrix

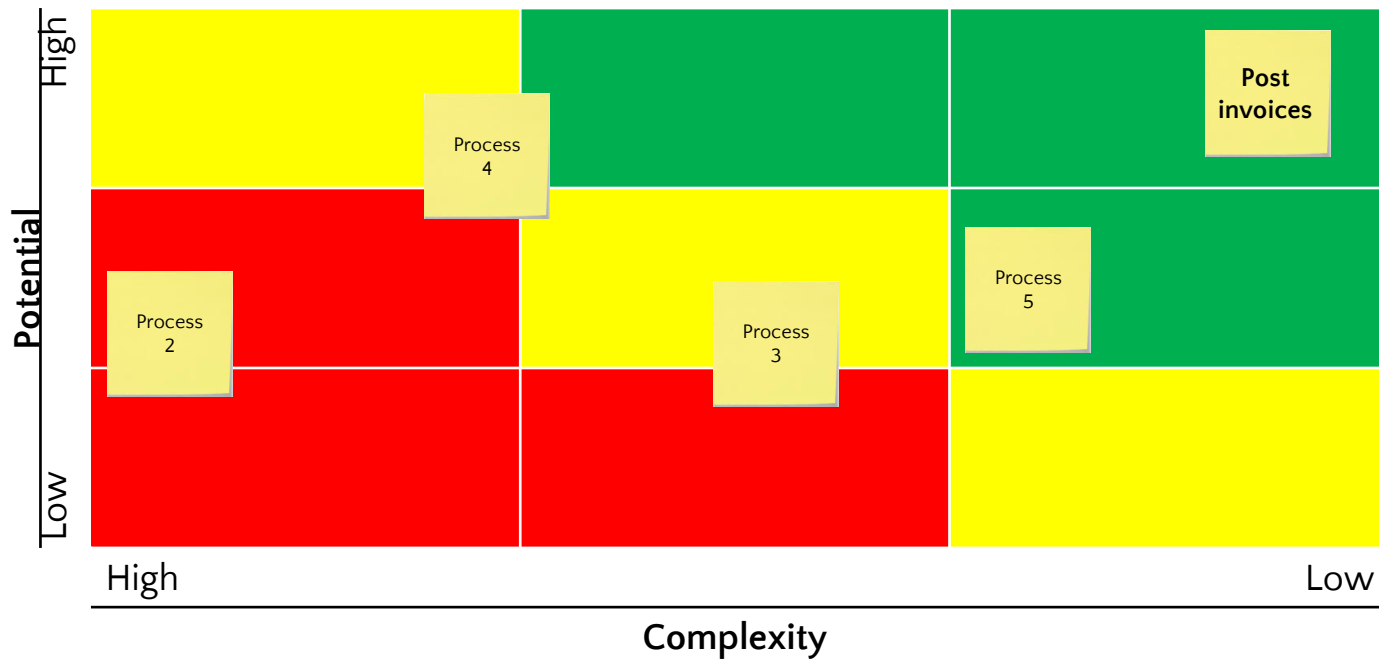
- High potential/Low complexity
- Medium potential/Medium complexity
- Low potential/High complexity

	POTENTIAL						COMPLEXITY							
Process name	1. Avg. processing time (hh:mm:ss)	2. No of times process is executed per week	3. Share of process which can be automated (%)	FTEs replaced by automation (1*2*3/40hrs)	Does the process have peak periods?	Is the process prone to errors?	Is the process input standardised?	Is process input digital and structured?	Is the process well documented?	What are the process data sources?	Which systems does the process use?	Is the process rules based?	Does the process have exceptions/variants?	Are process changes needed for automation?
1	00:02:00	5500	80%	3.7 FTE	No	No	Yes	Yes	Yes	Invoice application system	Invoice application, outlook	Yes	Yes	No
Post invoices														



Prioritize processes

- Super candidate
- Questionable candidate
- Bad candidate



Automation will impact business functions differently

Bonus

Applicability of automation by business function

Percent, U.S. data

