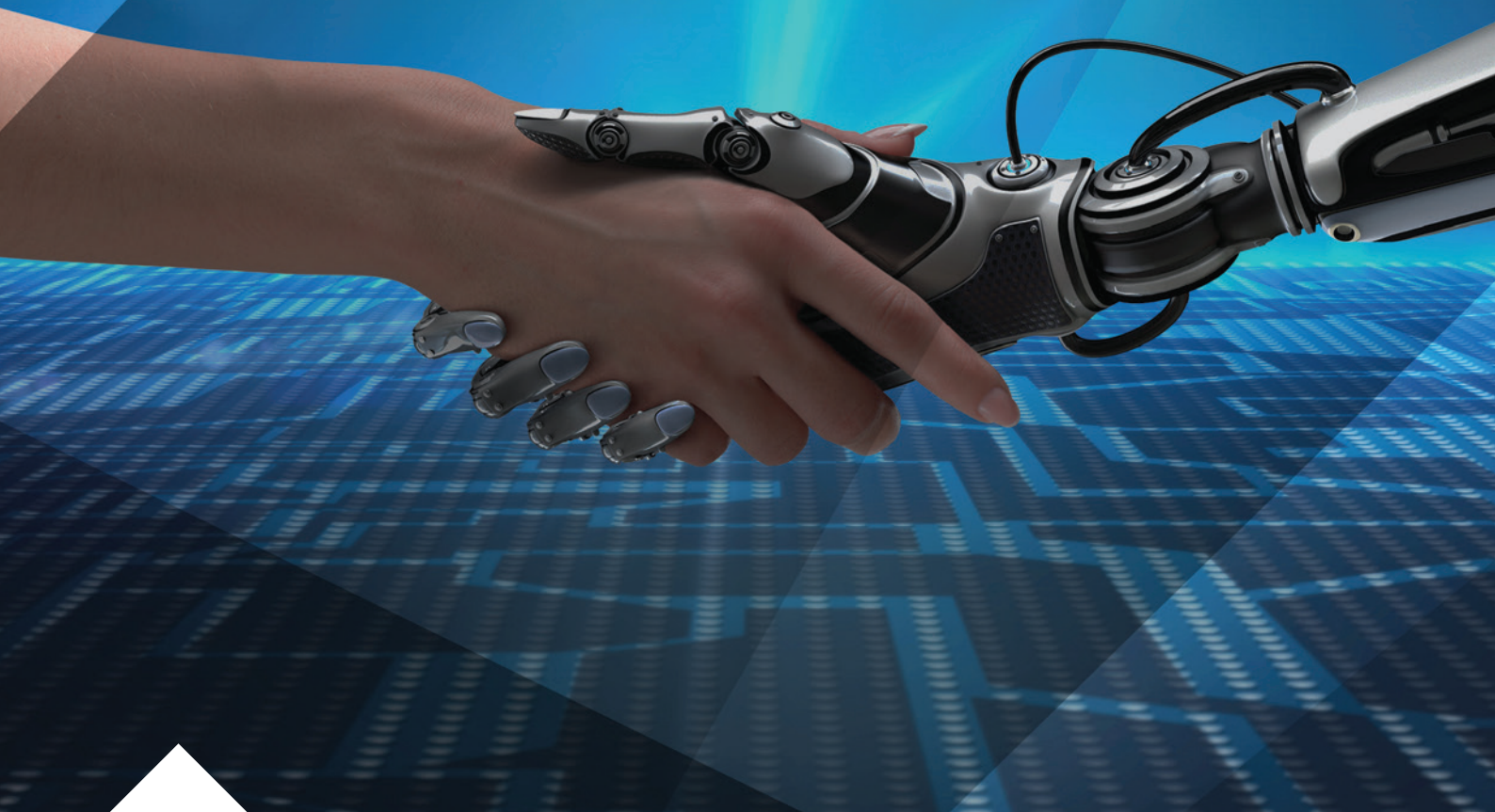


# Blue Prism Software Robots.

Introducing the  
Digital Workforce.



**blueprism**<sup>®</sup>  
Robotic Process Automation Software

Delivering the **world's most**  
**successful digital workforce.**

[blueprism.com](https://blueprism.com)

# The Art of Possibility.

**The challenge:**

Can two business perspectives be aligned?



There is often a tension between what the lines of business need to operate most effectively and the allocation of IT resources. While the overarching mandate

is to improve service and reduce costs, the resources and priorities of the two groups are often misaligned - and business growth and performance can be constrained.

The chart below highlights some of the capabilities and challenges on both sides.

Business Operations	IT
<ul style="list-style-type: none"> <li>✓ Manage operational processes often outside the scope of system delivery caused by inherent process variances</li> <li>✓ Require demand management (market demand flexibility), combining outsourcing, offshoring and centralization of resource</li> <li>✓ Want to increase productivity, reduce risk of non-compliance and minimize potential for errors</li> <li>✓ Need motivated, empowered staff to drive customer satisfaction and business value</li> <li>✓ Want a level of flexibility (to allow adaptation of their processes)</li> </ul>	<ul style="list-style-type: none"> <li>✓ Underpin the operation by architecting and delivering impactful and transformational programs of new services and platforms</li> <li>✓ Must maintain the current infrastructure, systems, support network and environments and maintain system health (backup, resilience, continuity)</li> <li>✓ Security, governance and compliance is a priority</li> <li>✓ Require total visibility of all systems and software</li> </ul>
<p><b>But:</b></p> <ul style="list-style-type: none"> <li>✗ Costs are high – some work is mundane, over-burdened with rote processes, little innovation, risk of non-compliance</li> <li>✗ Frustrated by wait-time for IT support</li> <li>✗ Sometimes turn to “shadow or grey” IT for quick short-term solutions when a permanent solution is unachievable</li> </ul>	<p><b>But:</b></p> <ul style="list-style-type: none"> <li>✗ Constraints prevent IT from providing the operational scoping, design and solutioning to solve all business inefficiencies</li> <li>✗ Uncomfortable with solutions for which they have no control, often deployed by the business which turn into permanent solutions</li> <li>✗ Strive to deliver the needs of the business but typically constrained by existing commitments and varying priority of change initiatives</li> </ul>

## “Taking the Robot Out of the Human”

Market forces drive organizations to make frequent and granular changes to the way they work, and organizations often compensate by adding people to fill the gaps between system performance and desired results.

The process of change can cause the human workforce to perform “like robots”. Back office processes can be

mundane and repetitive - and ripe for errors when tedium sets in. Instead of focusing on customers teams can end up serving the systems by performing repetitive tasks without engagement. Tasks are completed at the expense of the communications with customers when employees could be using their human skills and process knowledge to improve the customer experience overall.



# RPA to the Rescue.

Transforming the Back Office.



In research conducted by the London School of Economics (LSE), Professor Willcocks and Dr. Lacity (University of Missouri) conclude that in pursuit of reduced costs and improved services, businesses have transformed over the past few decades using the following principles:

- **Centralization**
- **Standardization**
- **Optimization**
- **Relocation**
- **Technology enablement**

The researchers conclude that the next logical step is to **automate!** For most businesses, the best candidates for automation are often “back office” processes, where the goal is to provide faster, easier service to customers (activating a new SIM card in 5 min vs. 24 hours), and to reduce high processing costs and error rates - processes that are mundane and require entering repetitive data into multiple systems where the systems don’t talk to each other.



*Banks have enhanced many of their customer-facing, front-end operations with digital solutions...but too many processes at banks still rely on people and paper. Often, back offices have thousands of people processing customer requests.*

*This high degree of manual processing is costly and slow, and it can lead to inconsistent results and a high error rate. IT offers solutions that can rescue these back-office procedures from needless expense and errors. Our research indicates that a significant opportunity exists to increase the levels of automation in back offices...*

McKinsey <sup>1</sup>



## The Robotic Process Automation Opportunity

Robotic Process Automation (RPA) represents an opportunity to transform the back and front office and improve business performance across the entire organization.

- **Increased Efficiency and Productivity**
- **Greater Operational Ability**
- **Reduces Operational Risk**
- **Superior Control, Governance and IT Security**
  - **ever increasing regulation and compliance requirements (corporate governance); always seeking to reduce cost**
- **Enhanced Business Insight**

## Getting to the Right Solution: How to identify and achieve the real benefits of RPA.

Over the last few years the Robotic Process Automation landscape has changed with many adjacent technologies rebranding their solutions as RPA.

As the London School of Economics research shows – there are three major types of RPA referred to as the Three Lane Highway.



# The 3 Lane Highway for RPA.

To realise the full potential from Robotic Process Automation requires a focus on adapting the culture of the organization as well as building specific RPA skills and capability.





Recent LSE research indicates that Robotic Process Automation comes in many forms but finding the right automation solution doesn't have to be complicated.



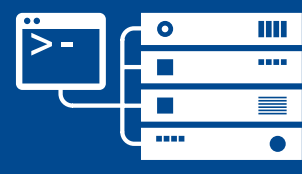
### Desktop Recorded Automation

Multiple, short, record and replay tactical automations aimed at navigating systems on the desktop. Automated tasks, often manually triggered, are coded or recorded individual key strokes deployed to users' desktops.



### SDK / IT Developed

Provides a "virtual API" to facilitate IT projects where interfaces don't exist. Coded by skilled IT developers as part of a project to deliver against pre-defined automation requirements.



### Digital Workforce Platform

Single instance, enterprise strength, scalable, server-based capabilities designed to deliver true strategic benefit -- freeing people up to do the high-value things they do best-- think, communicate and resolve with passion and empathy -- using their skills to improve the way a business operates. Hosted virtually and governed by IT but devolved to the business for configuration, control and monitoring, the Digital Workforce is not a quick fix – it takes a few months to train the business on how to use it.

Desktop Recorded Automation	SDK / IT Developed	Digital Workforce Platform
<p>This software can be implemented very quickly, sits on an individual desktop and is managed in isolation by each person running the process - each desktop independent from the others. If you are not concerned about “shadow or grey” IT this approach is similar to a personal assistant handling non mission-critical transactions. The software doesn’t address compliance or risk requirements, and ignores standardization and consistency across desktops.</p>	<p>This solution requires IT developers to build in the security, change management, development environment and code to make it IT enterprise safe.</p>	<p>This solution involves IT by bringing the solution onto an enterprise platform that is flexible and centrally governed but doesn’t require IT developers. This works for mission-critical processes because the solution is not brittle (it won’t break) and the business can make needed changes without involving IT, whilst robots are repeating mundane tasks without human error, ensuring compliance and error free processes. This approach also has a dashboard that monitors robots’ resilience, business and system exceptions.</p>

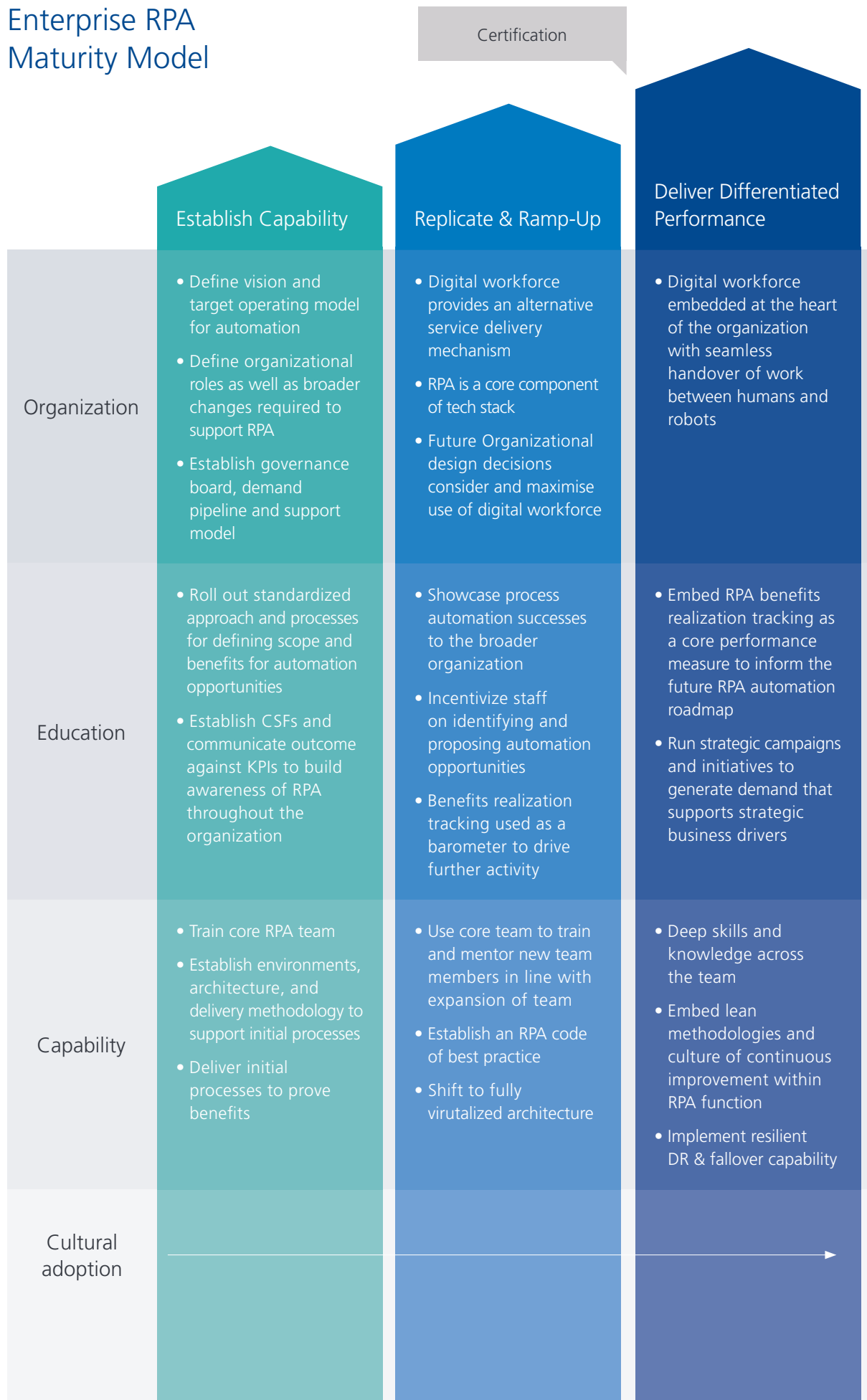
## Potential challenges

These solutions all pose potential challenges that affect how your business operates and how the solution will scale and deliver benefits. As the three lanes are not interchangeable, you really need to focus on the end goal – making it easier to complete certain tasks, accelerating IT integration projects, or creating a digital workforce – and pick the one that achieves your objectives.

Risk Management is also a key consideration when evaluating RPA platforms. Data that is low risk doesn’t necessarily have to be secure – data that sits on a desktop is not secure. Data that is high risk requires high levels of security, governance and oversight from IT with secure log-ins, access rights and encryption.



## Enterprise RPA Maturity Model



# The Blue Prism Digital Workforce

Blue Prism pioneered the concept of the Digital Workforce Platform and has spent over 12 years developing an enterprise Robotic Process Automation platform designed from the outset as RPA (not converted from another technology) which is robust, highly scalable, secure and reliable. Using an agile digital workforce that follows rules-based business processes and interacts with the systems the same way that users currently do, Blue Prism's software complements traditional IT solutions such as BPM and front office productivity tools.

The Blue Prism solution was designed with key attributes that make it enterprise safe and scalable, endorsed by IT and business operations and capable of running unattended without the need for constant monitoring. The robots are given secure logins with access rights and encryption. Data integrity is maintained as the robots are non-invasive, create no new data and have no impact on existing databases. A control room and dashboards monitor outcomes, review the priorities of the workforce, and manage business or system exceptions. The solution is centralized, not on a user's desktop and managed by the business so processes are easily changed.

*“Blue Prism pioneered the concept of the Digital Workforce Platform and has spent over 12 years developing an enterprise Robotic Process Automation platform designed from the outset as RPA.”*

## Implementing the Blue Prism Solution

Blue Prism's RPA software solution provides the capability for automating processes that would otherwise be executed manually by humans or through extensive proprietary customization of existing IT systems, resulting in a higher level of automation with a significantly lower level of investment and greater speed to deployment.

Blue Prism also offers a methodology to support adoption which furnishes organizations with tools and approaches that define the business case, engage the relevant stakeholders appropriately and maximize the scope of the potential and on-going benefits that are delivered.



## Case Study: Telefonica O2

Telefónica O2, owned by Telefónica Group, is the second-largest mobile telecommunications provider in the United Kingdom (UK). As the volume of back office work offshore grew from about 400,000 transactions per month to over a million transactions per month, Telefónica O2's back office costs escalated.

The mandate became: do more work with less money - reduce FTE count, average response time and Back Office failure customer calls by 50 percent. Telefónica looked to eliminate, simplify and optimize business processes and reduce headcount by 10 percent.

After hearing of Blue Prism for automating processes, Telefónica O2 decided to conduct two pilot projects to prove the concept: 1) SIM swaps—the process of replacing a customer's existing SIM with a new SIM but keeping his or her existing number 2) application of a pre-calculated credit to a customer's account.

They also tested if their BPMS team could automated the same two processes within three weeks. BPMS achieved the goal but the financials between Blue Prism and BPMS automating the processes were significant: RPA for 10 automated processes would pay back in 10 months. In contrast, the BPMS was going to take up to three years to payback.

The difference was the BPMS team required IT resources like developers and SCRUM teams while staff members from the Back Office executed the RPA projects. RPA was selected as the obvious choice.

**As of April 2015, Telefónica O2 deployed over 160 "robots" that process between 400,000 and 500,000 transactions each month, yielding a three-year return on investment of between 650 and 800 percent. Customer "chase up" calls have been reduced by over 80 percent per year.**

# O<sub>2</sub>

# Governed by IT - Controlled by Business Operations

Ensuring IT has an inherent layer of structure, governance and auditability, the Blue Prism software is code-free and managed by the business. This enables Business Operations to respond rapidly to changing priorities and customer demands while IT ensures the data is safe and secure.

The Business team is empowered to manage, shape and deliver business imperatives driving improved efficiency and customer service while IT resources are freed up to concentrate on more transformative and strategic initiatives that require extensive investment.

## The Blue Prism Digital Workforce

- **Sits at the presentation layer and is designed to interact with the user interface of existing applications**
- **Provides the ability to identify and update individual system touch points through the automation library, enabling organizations to respond to system changes more swiftly without the need to initiate a formal software project**
- **Meets strict standards for security, data integrity and operational resilience**
- **Retains business logic**
- **Prevents the occurrence of so-called 'grey IT' – offering instead, a standardized, operationally controlled, but centrally managed and governed solution**

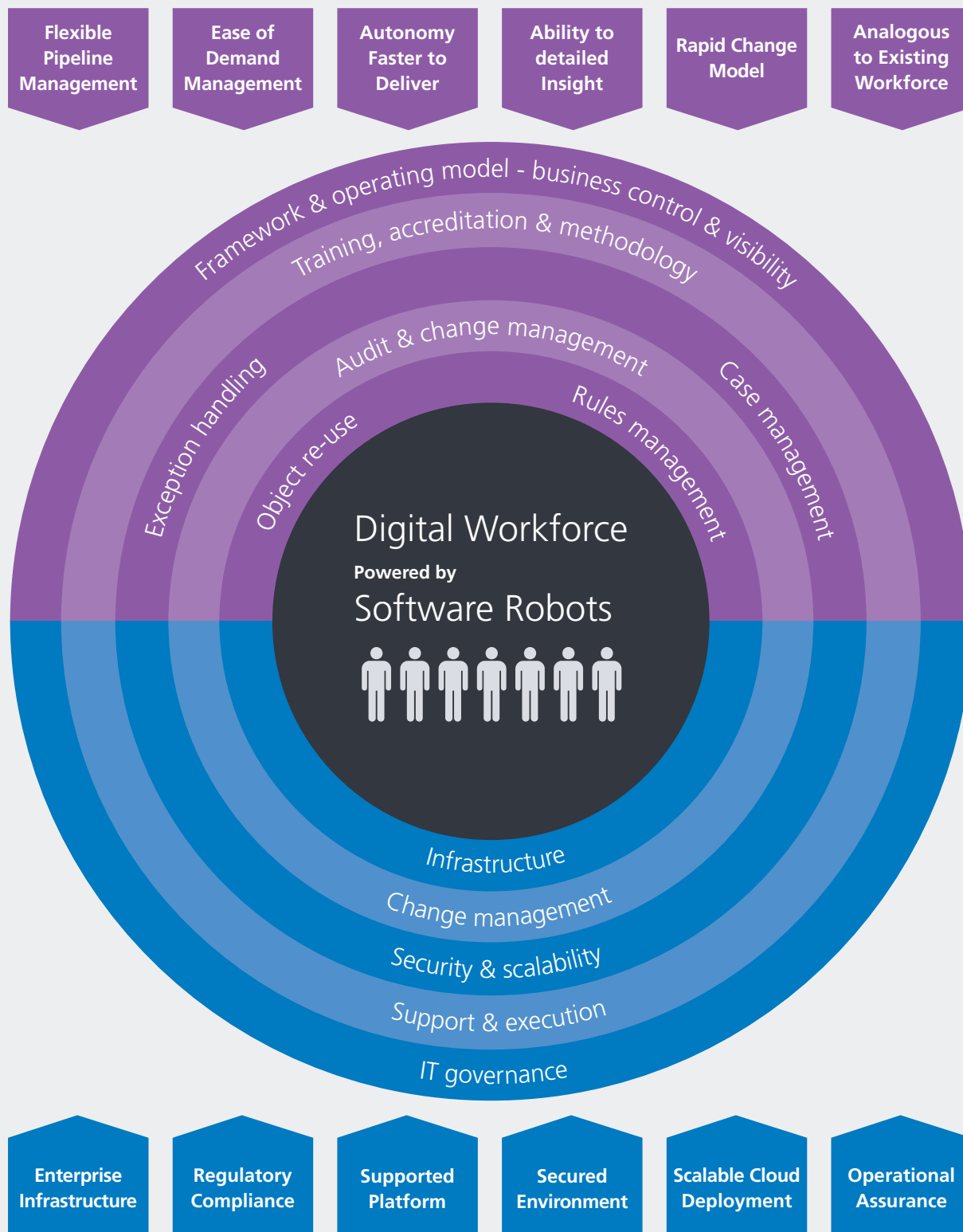
With a Digital Workforce, organizations can perform tasks more accurately and thus:

- **Reduce errors and increase consistency**
- **Provide better service, more quickly and more dependably**
- **Respond better to seasonal peaks and troughs by reducing the need to create temporary workforces to meet demand**
- **Ensure compliance standards are met with virtually no mistakes**
- **Enable employees to focus on higher value decision - making and customer contact that only humans can provide: empathy, inference and judgements**



## A partnership between Operations and IT

Controlled by Operations



Supported & hosted by IT

## Case Study: Xchanging

Xchanging is a provider of technology-enabled middle and back office business processing, technology and procurement services including onshore, nearshore and offshore centers for providing services to customers globally across many industry sectors. Deploying technology and innovation, Xchanging aims to perform customers' non-core and back office functions better, faster and more cost-effectively, allowing customers to focus on strategic activities and adding business value.

RPA was first brought into Xchanging's Insurance sector which has a huge amount of back office, high volume, repetitive data collection and processing tasks, many of them still manual, and many still taking data from nonintegrated legacy mainframe systems and extracted from various sources for input into another system or used to generate reports.

Xchanging Insurance business had two ongoing contracts that required centrally running all the claims, premiums, policies, back-office policy and administration processes. Having already invested in 13 years of process improvement RPA seemed the next logical step.

Xchanging started by launching four automated processes using 10 robots whilst establishing a long-term governance and support competency for the Group. Cultural adoption was key as Xchanging realized that RPA would be viewed as a threat but they showed employees that there were no redundancies and that RPA gave people the opportunity to move on to other, more interesting work.

**As of June 2015 Xchanging has automated 14 core processes, handles 120,000 cases/month with 27 robots and they've seen a 30% reduction in cost per process. Service quality has improved with high accuracy, faster turnaround time, scalability and increased compliance are just a few of the other benefits. Now the Procurement and F&A financial services divisions are pushing hard to implement RPA.**





“Blue Prism reduces process costs, increases speed and improves accuracy through its robotic automation platform, which operates other applications in the form of a digital workforce.”

Gartner <sup>2</sup>

## Blue Prism's RPA software addresses the following process types:

- Rules-based processing with digital structured inputs such as credit card activation or fraud checking
- Repetitious transactional processing such as SIM swaps or invoice processing
- High transaction volumes such as billing or new handset order processing
- Process adherence/quality issues such as policy renewals or policy migrations
- Complex/mission critical processing – pension redemptions and financial reconciliation
- Fluctuation in demand or backlogs such as with new product launches
- “Swivel Chair” processes such as HR onboarding or launching a new online product where there is no integration

## Intelligent Execution Technology

Organizations can instruct the autonomous engine on the process priorities, feed volumes of work and leave it to run, responding to systems, business scenarios and changes in priority without human intervention. Similar to human teams, robots can be applied to work based on SLA, volume, priority and adapt and change the allocation of robots to work dynamically without intervention.



## Enterprise Technology Platform

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### Built on the Microsoft .NET Framework

Built on the Microsoft .NET Framework, it is technology-agnostic, working across multiple platforms and technologies (mainframe, windows app, WPF app, Java, SAP, Exchange, custom applications, Citrix, thick client, thin client, web services, etc.)



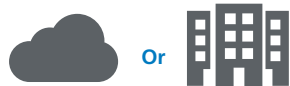
### Security at the presentation layer

Software 'robot' securely logs into an application and manipulates the presentation layer that same way a user would but in a controlled environment (non-invasive, which means it will never compromise the integrity of the application)



### On Premise or Cloud

Provisioned in a public or private cloud, on-premise or hybrid enterprise deployment



### Central Repository

The robots are ubiquitous and any process that has been configured in Blue Prism can be executed on any number of robots within the Digital Workforce



### Regulatory Compliant

Proven to support PCI-DSS, HIPAA and SOX compliant processes



### Work Queues

Offers a queue-centric approach for dynamically controlling the number of Resources, or Robots, operating against a given queue at a particular time providing the maximum flexibility to adjust the number of resources assigned to collaboratively work items in the queue based on business demands.



Three main areas used for building, testing, releasing and controlling processes:

### Control Room

A day-to-day operational environment that is used to control, monitor and schedule the runtime resources.

### Release Manager

Gives detailed visibility of the process elements that are associated with a given series of processes to provide streamlined and automated change management functions.

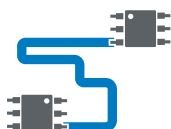
### Studio

Provides a single point of access for developers to create, define and test re-usable building blocks, Business Objects, on how to interact with a given software or tool. The Application Moduler is where robots are trained on how to reliably find and interact with various elements of the target applications. With Process Studio, users are enable to design, build and test end-to-end processes including decision trees, exception handling and reaction to the speed of target applications.



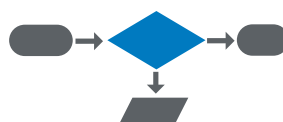
### Dependency Tracking

Provides an interactive view of how a given component is referenced within a design process to accelerate development, promote re-use and support maintenance.



### Object Oriented

Allows fast scaling by leveraging reusable objects and libraries



### Reporting and Analytics

Furnishes high-quality data that can be used to drive meaningful BI and MI reporting and identifies both inline process statistics and real-time operational analytics by recording each and every step.



### Localisation

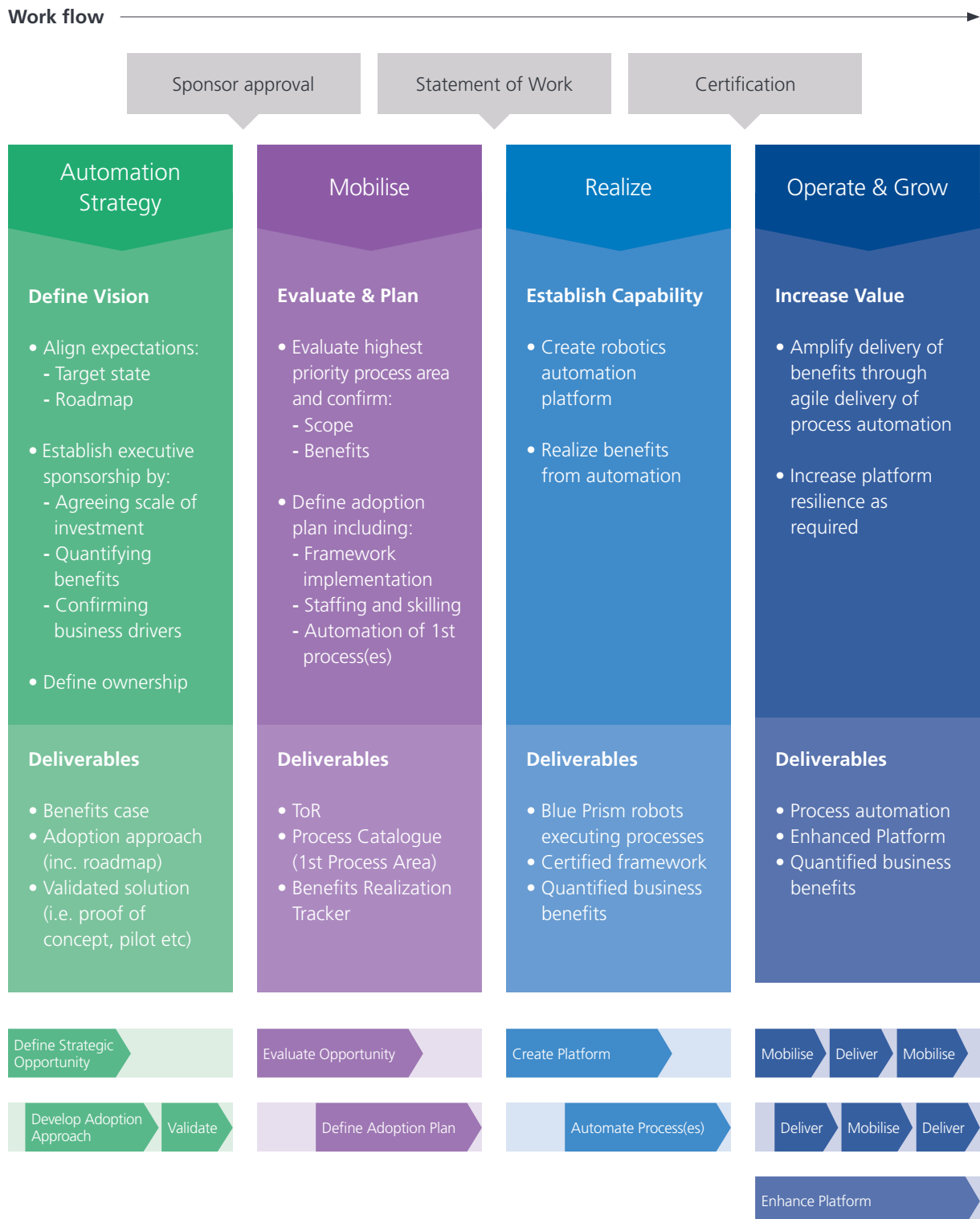
Runs all Blue Prism components onto devices configured for different locales allowing developers and controllers to work with their own local settings (date/time formats, different decimal, number groupings and parameter separators).





## Vision to value

Blue Prism delivers a capability and return on investment that can be scaled in line with your vision.





## Professional Services

Blue Prism has a proven delivery methodology to ensure successful implementation. Our internal professional services team or certified partners:

- **Identify the processes that are best suited for Robotic Process Automation**
- **Establish the benefits case for RPA encouraging organization-wide recognition and adoption**
- **Provide the necessary skills to operational resources via role-based training and mentoring accreditation**
- **Implement the required infrastructure, governance and support framework to enable RPA to run efficiently and effectively**
- **Define a best practice approach for process configuration increasing the potential for automation and accelerating the development life cycle**

## Technical Support

Blue Prism Technical Support is provided through:



A comprehensive help guide within the product



Detailed data sheets via the online portal on a variety of relevant topics



Technical support helpline, email and online online user community of experts



Accredited partners through bespoke support contracts tailored to the needs of a specific organization

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## Training and Accreditation

Training courses are delivered via the self-paced online training platform or, alternatively, in a more formal classroom environment by a Blue Prism accredited training partner.

Role	Training Modules				
	Product Induction	Assessment	Controller	Developer	Support
Program Manager	✓	✓			
Automation Manager	✓	✓	✓		
Delivery Lead	✓	✓			
Process Analyst	✓	✓			
Senior Process Developer		✓	✓	✓	✓
Process Developer		✓	✓	✓	✓
Junior Process Developer		✓		✓	
Test Analyst	✓		✓		
Process Controller	✓		✓		✓
Service Analyst	✓				✓





# Imagine the Possibility: Software Robots – the Digital Workforce

Imagine a different kind of workforce that you can teach countless skills. The more it learns, the more efficient it becomes. It works without ever taking a vacation. It can be small one day or large when your business hits a spike. And it frees up your best people in both the line of business and IT to do their best work on your highest priorities.

Meet the Software Robots – the Digital Workforce.

**Call us today on  
1-888-75-PRISM (1 888-757-7476)  
or +44 (0) 870 879 3000**

**or visit us at  
[www.blueprism.com](http://www.blueprism.com)**

to start building your Digital Workforce.



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