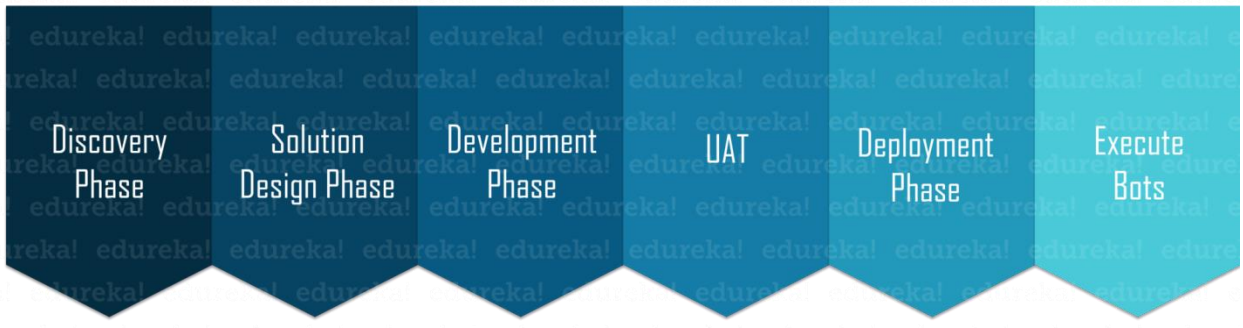
Identify the Right Process for Automation

The potential for Robotic Process Automation (RPA) to eliminate repetitive tasks so enterprise talent can focus on higher-value deliverables is undeniable. As is the benefit of making those repititive tasks more reliable, faster, and with higher-quality results.

With such stark benefits, it's hard not to become overzealous with automation, but jumping in blindly can pose significant consequences when trying to scale or evaluate your ROI. Large enterprises are still struggling to scale RPA (only 3% of bot deployments reach scale). The business processes they choose to automate may be part of the problem. Even though the opportunities and candidates for Robotic Process Automation are ample, the truth is, RPA isn't right for *every* process. We've continually advocated that one of the keys to scaling RPA , is choosing the *right* processes to automate.

Below are ways to identify the optimal use cases for RPA at your organization, helping you to not only drive scale, but also time-to-value and your return on investment.

RPA Life Cycle:



Discovery Phase

In this phase, the requirements of the client are analyzed by the Process Architect. Based on the requirements, given by the client, it is decided whether the process can be automated or not. If the process can be automated, then the complexity of the process is analyzed. Finally, the benefits from the automation are penned down.

Solution Design Phase

In this phase, the solution or the steps to automate a task is designed. The Technical Architect in collaboration with the Process Architect makes a Process Definition Document (PDD) which contains the information about each and every process/step to depth.

Once all the client requirements are analyzed and the Process Definition Document is made, the next step is to decide few requirements for the project such as Budget, Time to be spent, and number of people working on the project and so on.

Then, you have to create an Object Model Diagram or a Flowchart to understand the flow o process. With the help of this, you will be able to understand which step has to be automated and what are its requirements.

After you create the flowchart, you have to choose an RPA Tool to automate your task and then, you are good to get started with developing the bot.

So, the next phase is the Development Phase.

Development Phase

The Development Phase is the phase wherein the Automation Developer creates Automation Scripts in the chosen RPA Tool. The tool could be any of the enormous amounts of the tools present in the market, but, the top 3 tools in today's market are UiPath , Blue Prism & Automation Anywhere. Also, the Automation Scripts are created by referring to the

previously created Process Definition Document. Depending on the task to be automated or the kind of automation required, there may or may not be coding required; but, there are humongous amounts of scenarios where you do not need coding at all.

Now, once your bot has been developed, the next stage is to test the developed bot.

UAT(User Acceptance Tests)

In this phase of RPA lifecycle, the developed bot is tested either by the Testing team or the Development team itself. The bot is tested in the pre-production environment to test how the users can use this bot to automate a specific task. If the testing is successful, then it moves forward with the next stage, But, if the testing fails, then the bot goes back to the Development Phase where the errors found in the Testing phase are rectified and are tested again.

Once your bot is successfully tested, the next stage in the RPA Lifecycle is the Deployment Phase.

Deployment & Maintenance Phase

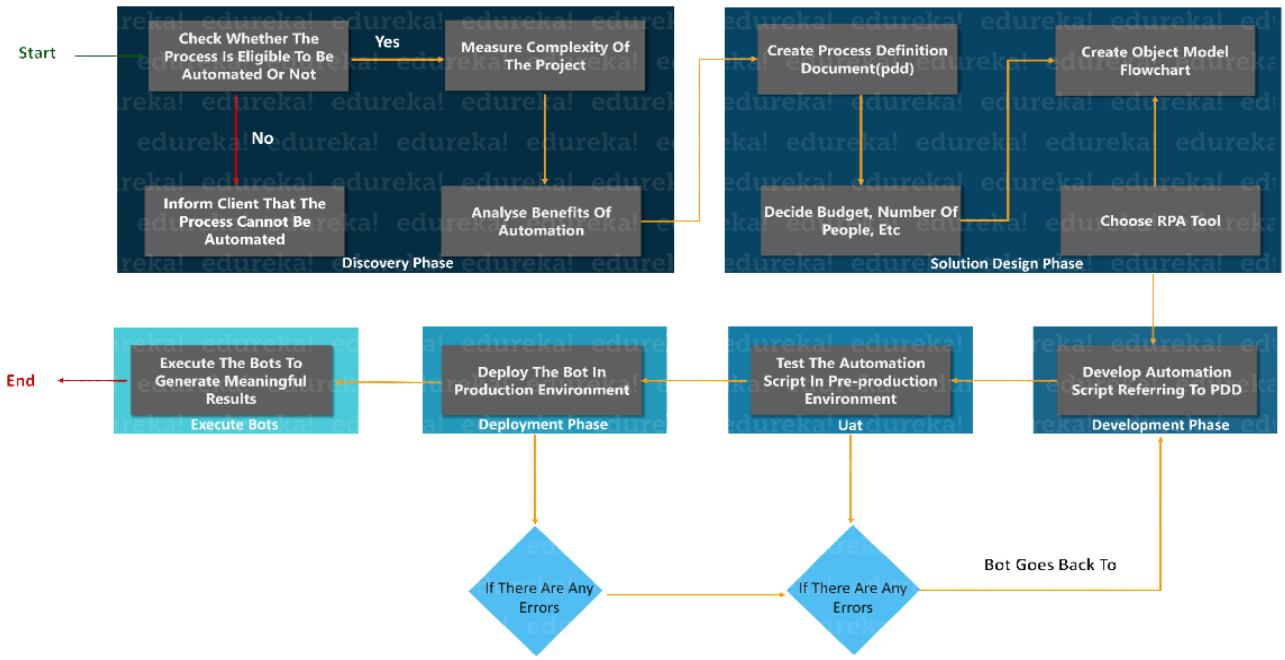
After developing and testing a bot, the bot is deployed into the production environment. Now, once the bot is deployed, users can use it. But, if there are any issues with the bot, then it goes back to the Dev & Testing teams to resolve the issue.

Well, these were the main phases of the RPA Lifecycle.

Now, the final stage is to execute the bot.

Execute Bots

In this stage, the bots are executed and thereafter checked to generate meaningful results. So, folks, with this, we come to an end of this article. To help you understand the flow of building a bot, you can refer to the below image:



Understand your processes

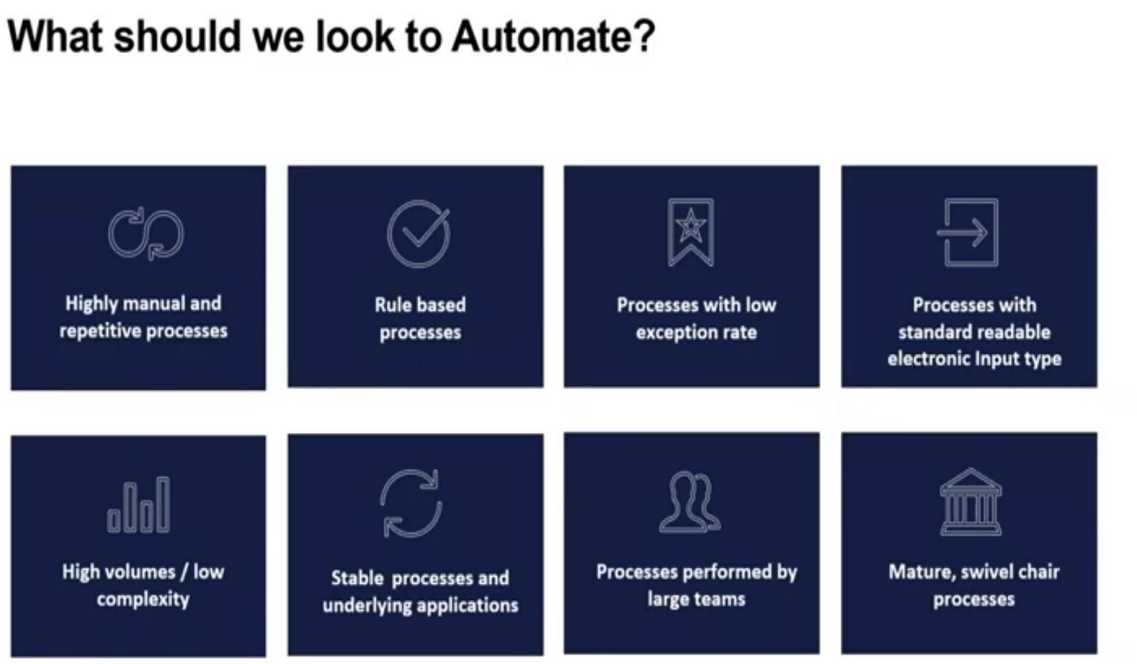
Completely understanding any process that you're thinking about automating is paramount. That means fully understanding every step of the process, the process's objective, and most importantly, its business context or how it fits into the big picture.

A common mistake many large enterprises make when Implementing RPA is to hasten their approach and automate processes that are flawed to start with. A basic principle of process automation is that only clearly defined, standard, and precise processes are fit for automation. Most large organizations don't have clearly defined, standard processes. If you take something as simple as processing an invoice, I'd wager there are several different ways your organization processes invoices. Automating the same process six times in six different ways is a waste of resources and will only add barriers in any attempt to scale. Understanding your processes is the first step to standardization and then optimization, which lends itself beautifully to automation.

Which processes to select for RPA?

Businesses can safely select processes, which involve any of the following criteria, for the business-transformation:

- **Rules-driven:** Processes that are rules-based and consistent are good candidates.
- **Repetitive in Nature:** Manual and repetitive tasks are the right processes.
- **Data Intensive:** Tasks that involve systematic churning of voluminous data.
- **Electronic Trigger:** Processes that commence on receiving electronic data files.
- **High error rates:** Tasks that involve paper-based data entry or are interdependent.
- **Manual Calculations:** Laborious tasks involving manual calculation of results, where one error leads to another.
- **Out-of-Hours jobs**: Seasonal work overloads, round the clock tasks, which involve resolving complaints, orders, etc.
- **Electronic Start/End points:** Processes involving digital inputs/outputs with intermittent manual steps.
- **High Compliance:** Processes which require audit proofs for regulatory compliance's.
- **Validations:** Tasks involving multiple systems where validations are required at each synapse.
- **Huge number of resources:** Tasks involving many resources and multi-step processes.



Define your RPA criteria

When defining automation candidates, you should ask yourself the following questions when considering any business process:

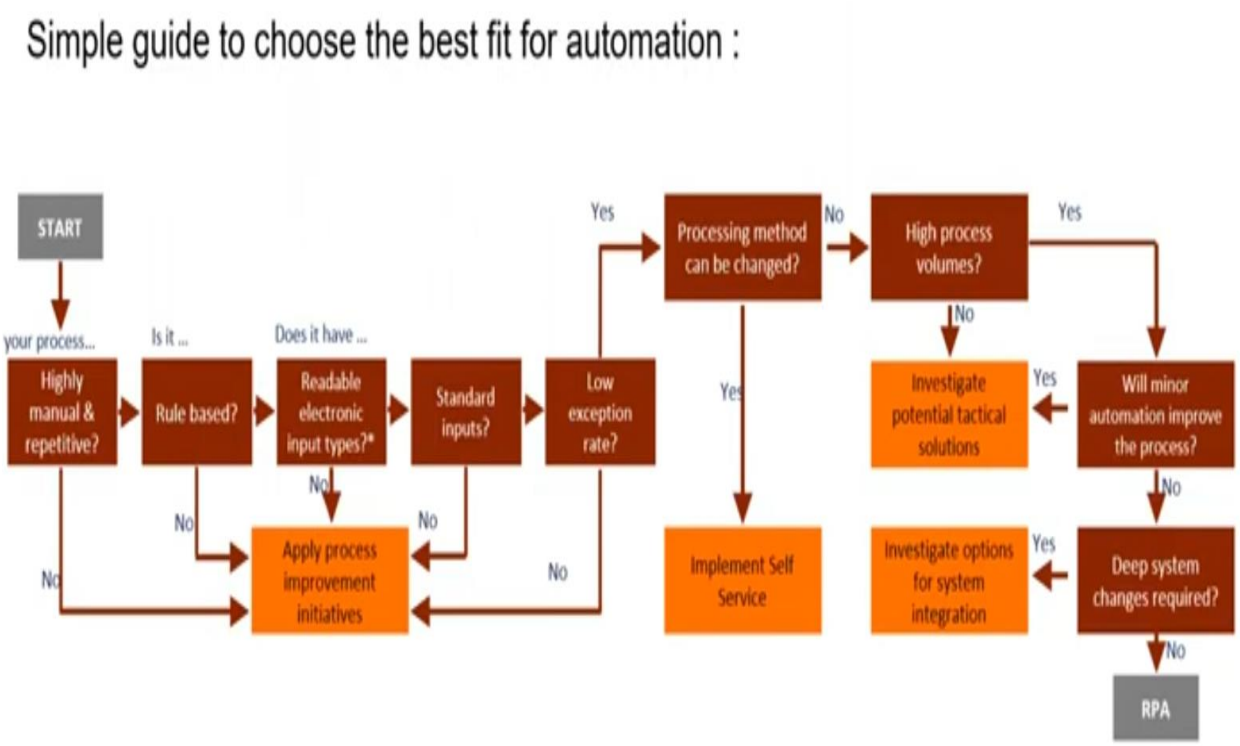
- Is it a common process? Is it executed repeatedly (at least once a week) and in some cases daily?
- Is it repetitive and mechanical? Are the same steps completed every time the process is executed?
- Is it based on a clear set of rules?
- Is it manually executed and therefore error-prone?

If a process fits every element on that list, odds are it's an excellent candidate to be automated. But even then, it's important to do some due diligence and ensure the process is a right fit for RPA by posing some further questions:

- Is the process executed digitally by an employee using applications?

- Is the process tied to regulatory guidelines and constraints (like the handling of personal information which is better suited to bots because compliance can be ensured and never under risk due to human error—a common challenge and reality for heavily regulated industries like healthcare, insurance, and financial services who stand to benefit the most from RPA)
- Does it involve tasks that are mechanical and require very little critical thought?
- Is it a standard universal process or are there variations of it across the organization?

It may seem simple, but asking these questions is fundamental to identifying the right processes to automate and set a foundation for scale.



Define your RPA objectives

Everyone has the same RPA objectives: to eliminate repetitive tasks so your workforce can focus on higher-value efforts, while making those mundane tasks more reliable, efficient, and with higher-quality results, to deliver business objectives and customer satisfaction.

To get there, it's important to whittle down your objectives by being a bit more granular and again, asking some key questions:

- Are there any processes creating bottlenecks?
- Are there processes that need more resources in order to be scaled?
- Are parts of your talented, knowledgeable workforce executing tasks that require no critical thinking skills that consume their time?
- Have operations suffered from error-prone data entry?

Understand where others have seen success

By the end of 2022, 72% of Fortune-1000 companies will have adopted some sort of business process automation. A good practice is to perform a benchmark test and understand which areas of the business other large organizations have realized value when automating processes.

In their analysis, this is where Gartner has seen the most traction for enterprises:

- **Human resources** – filtering applicants, employee onboarding, and payroll
- **Finance and accounting** – checking if invoice or order entry data is the in the correct fields and the collation of month and year-close
- **Customer management** – customer onboarding, web chat, collating data from various systems for customer service, orders, quotas, and delivery

- **IT** – password resets, password backups, etc.
- **Banking and Insurance** – moving data for claims processes, card management for lost or stolen cards, reversal of card charges, mortgage processing, and the resubmission of failed payments

The potential for RPA is boundless, and that in itself can be an impediment in realizing the value of automation and scaling it, but defining your criteria, objectives, and a framework for success can be the differentiator between a shaky attempt and a solid implementation set for scale to realize the value of RPA and the return available.

Selecting the right process, which falls under the above defined criteria, automatically translates into quick ROI. The process could be small but the savings achieved at the end of the year are significant. Simple processes reach breakeven in 2-4 months, medium complexity processes in 6 months, while highly complex processes reap ROI anywhere between 6 - 24 months. It is interesting to note that enterprise roll-outs and centralization of operations using RPA bring in efficiencies of scale.