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Process Design Document

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Contact Center Intelligence – CCI

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I. INTRODUCTION

1.1 Purpose

The Process Definition Document outlines the business process chosen for automation. The document describes the sequence of actions performed as part of the business process, the conditions and rules of the process prior to automation (AS IS) as well as the new sequence of actions that the process will follow as a result of preparation for automation (TO BE).

The PDD is a communication document between:

- The RPA Business Analyst and the SME/Process Owner. The goal is to ensure that the RPA Business Analyst has the correct understanding of the process and has represented it accurately.
- The RPA Business Analyst and the Development team (represented by the Solution Architect and RPA Development Lead). The goal is to ensure that the process is documented appropriately and to a sufficient level of detail so that the Solution Architect can then create the solution based on the PDD content.

1.2 Objectives

The business objectives and benefits expected by the Business Process Owner after automation of the selected business process are:

- Reduce processing time per item by 80%.
- Better Monitoring of the overall activity by using the logs provided by the robots.

1.3 Key Contacts

Add here any stakeholders that need to be informed or to approve changes to the process:

Role	Name	Contact Details (email, phone number)	Notes
N/A	N/A	N/A	N/A
N/A	N/A	N/A	N/A

1.4 Minimum Pre-requisites for the Automation

a) Filled in Process Definition Document
b) Test Data to support development.
c) User access and user account creations (licenses, permissions, restrictions to create accounts for robots)
d) Credentials (user ID and password) required to log on to machines and applications.

II. AS IS PROCESS DESCRIPTION

In this section, the Business Analyst will document the process. This section will serve as the starting point for the re-engineering and automation effort.

2.1 Process Overview

The section contains general information about the process before automation.

Item	Description/Answer
Process Full Name	Contact Center Intelligence - CCI
Process Area	Contact Center / Customer Service
Department	Contact Center / Customer Service
Short Description (operation, activity, outcome)	Providing customer service manually like responding to customer service request mail, or else resolving customer issues via manually chatting with customers or through long calls
Role(s) required in applications to perform the process	Customer service provider
Process schedule and frequency	Monday to Saturday, 10:00 AM – 10:00 PM.
Number of times the process is run by the selected frequency	N/A
Process execution time	Minimum 20 minutes
Process Restrictions	N/A
Peak Period (s)	N/A
Peak Volume Approximate increase	N/A
Number of persons performing the process	1
Expected Volume increase during the next periods	N/A
Percentage Un-handled exceptions	N/A
Input data description	A customer comes with queries via Email, Chat, or Call
Output Data description	Customer requests must be resolved

2.2 Applications Used

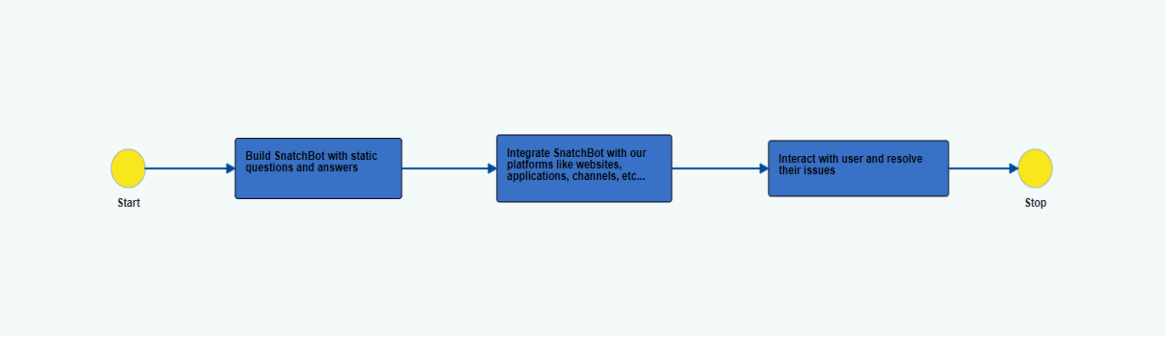
The table includes a comprehensive list of all the applications that are used as part of the process to be automated to perform the given actions in the flow.

Application Name	Version	Application Language	Thin/Think Client	Environment/ Access method	Comments
Gmail / Outlook	N/A	EN	N/A	Local desktop/Web application	Used to communicate and provide services to customers when a customer comes via Email.
SnatchBot	N/A	EN	N/A	Web Application	Provide services to customers when a customer comes via chat.
IVR Genesys	N/A	EN	N/A	Web Application	Provide services to customers when a customer comes via call.
ServiceNow	N/A	EN	N/A	Web Application	Create a ServiceNow ticket based on customer requests, which helps to track the status of the request in the future.

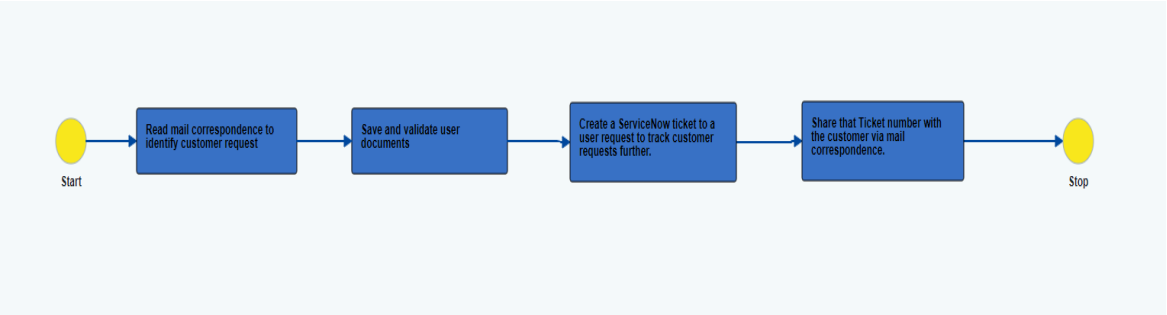
2.3 AS IS Process Map

This section contains various process maps contributing to a better understanding of how the process is performed pre-automation.

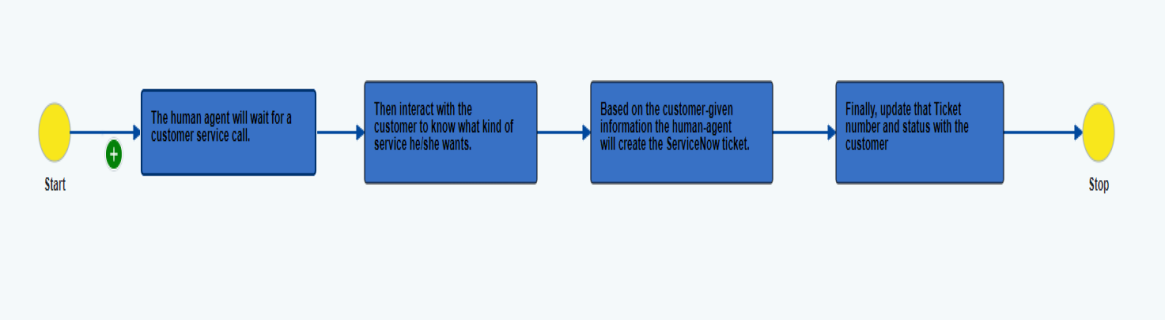
Service via Chatbot (Chatbot Bot)



Service Via Email (Email Bot)



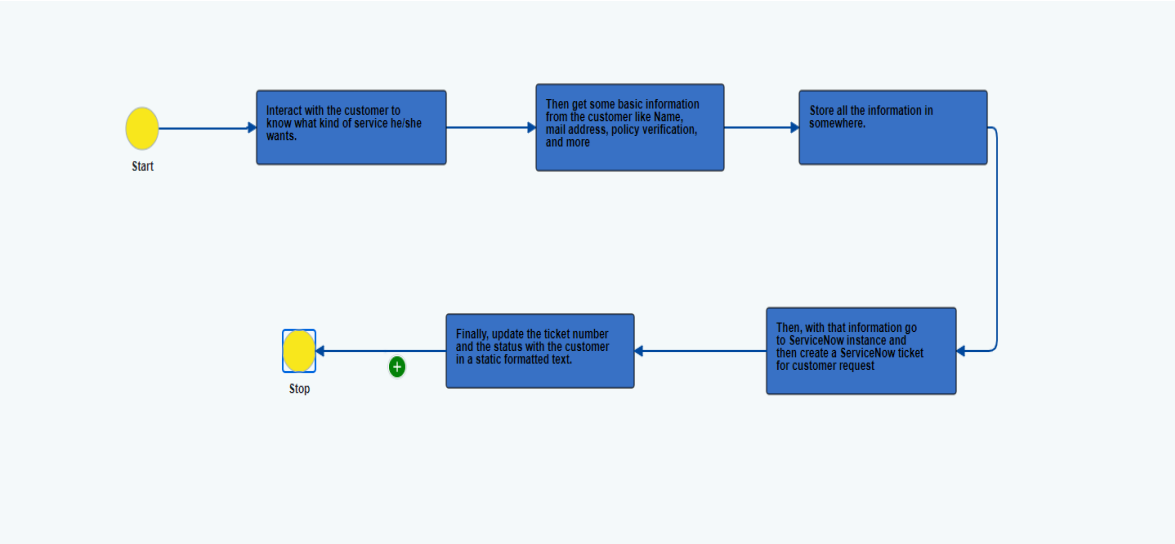
Service via IVR Call (Voice Bot)



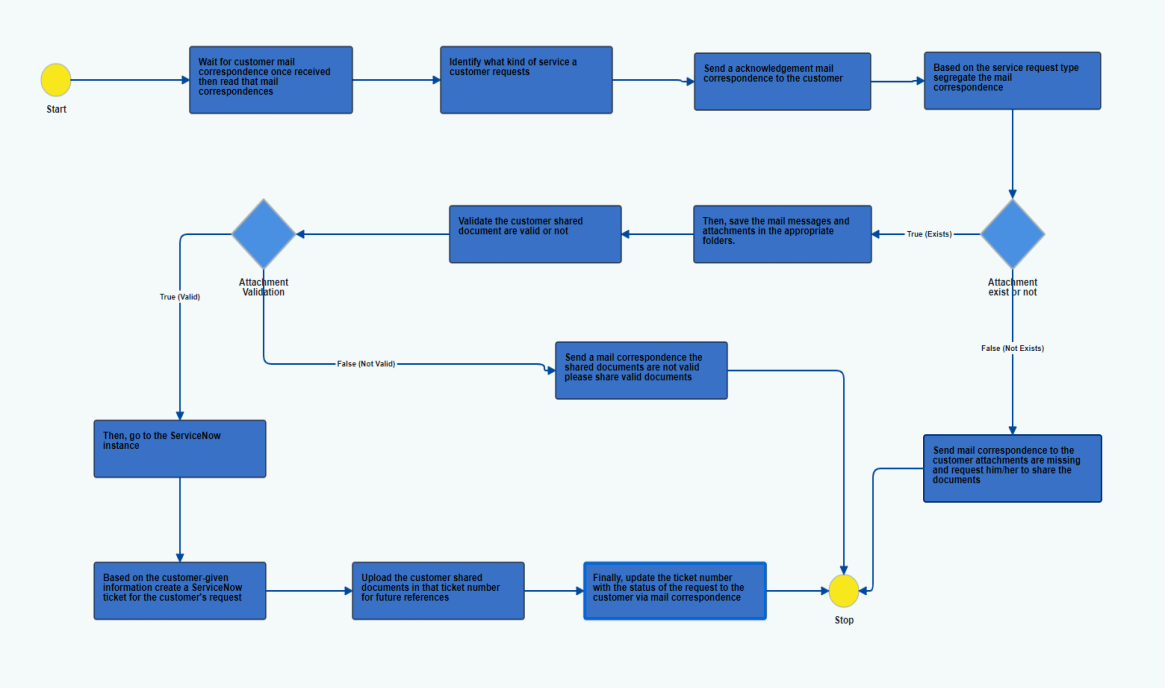
2.3.1 High Level Process Map

This section is useful for the Business Analyst in presentations and discussions with management to underline areas of weakness, inefficiency or to demonstrate which actions could be in scope for automation.

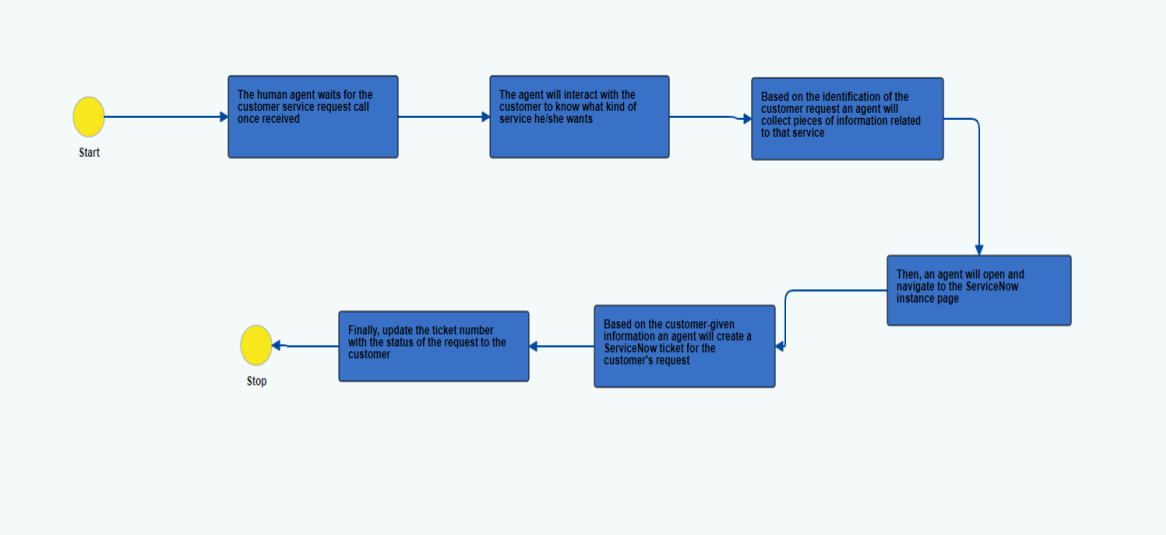
Service via Chatbot (Chatbot Bot)



Service via Email (Email Bot)



Service via IVR Call (Voice Bot)



2.3.2 Detailed Level Process Map

This section describes the process at key-stroke level and is an essential part for the communication with the developers.

2.4 Process Statistics

High Level statistics

Processes	Windows	Actions
{#total applications count}	{#total windows count}	{#total actions count}
4	4	**152**

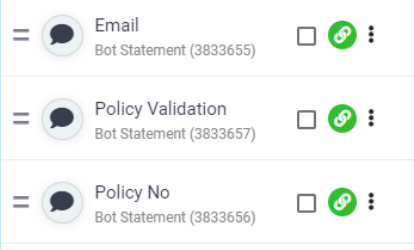
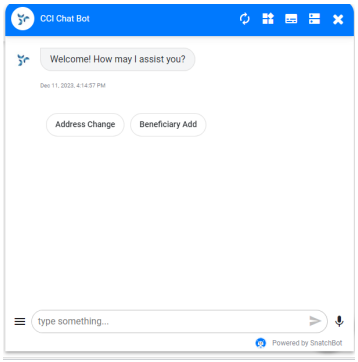
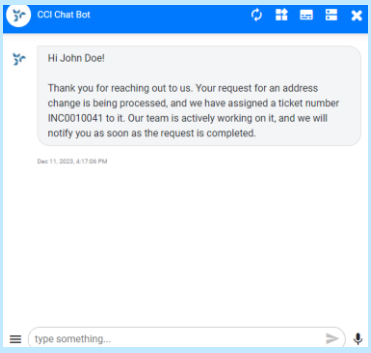
Note: Actions in high level statistics comprises of keystrokes, text entries and mouse clicks

Detailed statistics

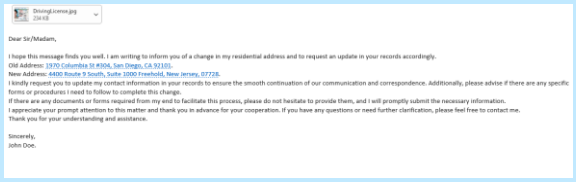
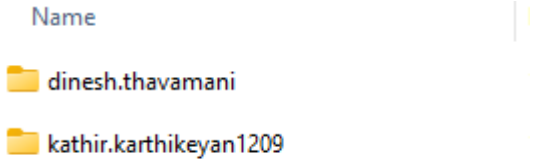
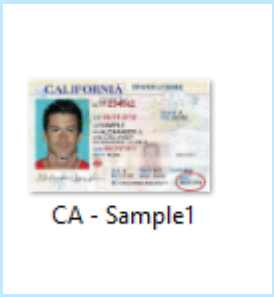
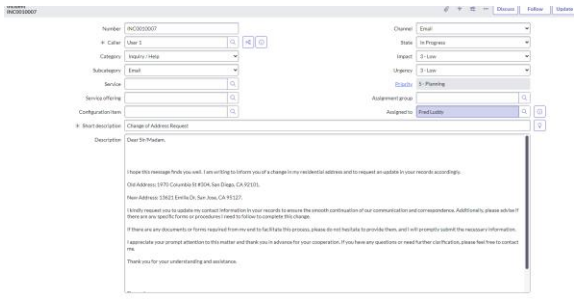
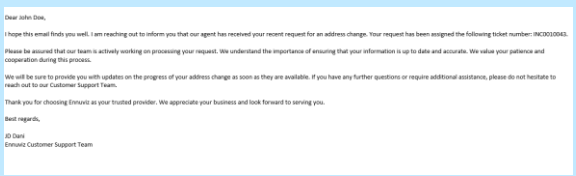
Window name	Actions
Gmail / Outlook	30
SnatchBot	**40**
IVR Genesys	**42 (Based on Forms)**
ServiceNow	**40**

2.5 Detailed As Is Process Actions

Chatbot (Chatbot Bot)

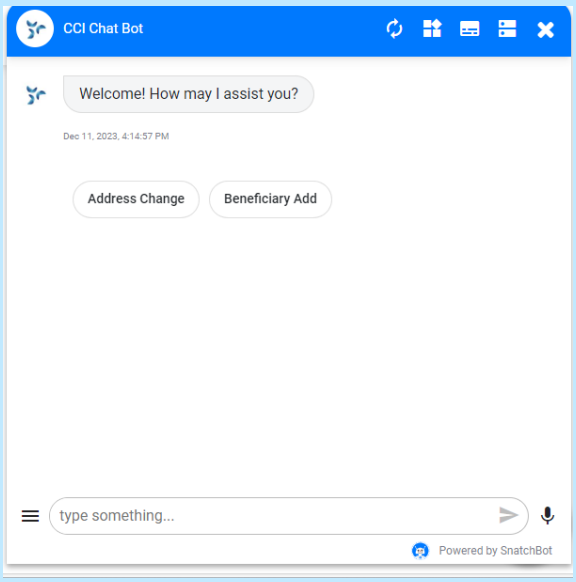
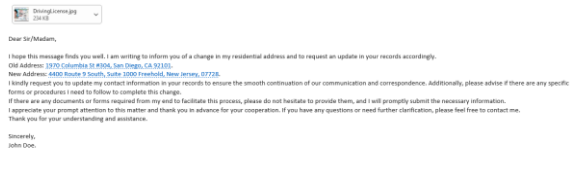
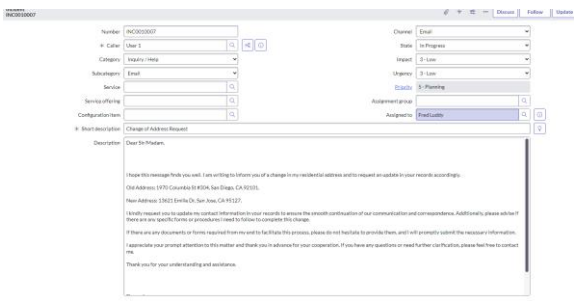
#Action	Input	Description	Details (Screen/Video Recording Index)	Exceptions Handling	Possible Actions
1	Text	Build bot with a static questions and answers		N/A	N/A
2	Text	Integrate bot in our websites, applications, and more		N/A	N/A
3	Click and text.	Interact with the user and resolve their issues		N/A	N/A

Email Bot:

#Action	Input	Description	Details (Screen/Video Recording Index)	Exceptions Handling	Possible Actions
1	Click and Text	Read mail correspondence and identify the type of service request.		N/A	N/A
2	Click and Text	Save mail correspondence and attachments		N/A	N/A
3	Click and Text.	Validate the user-shared documents		N/A	N/A
4	Click and Text	Create the ServiceNow ticket to user request		N/A	N/A
5	Click and Text	Update the ticket number and status to user via mail correspondence		N/A	N/A

2.6 Input Data Description

The following table should contain details regarding the inputs that every action of the process takes.

#Action	Sample	Input Type	Location	Are inputs Natively Digital*?	Are the Inputs Structured*?
1		Extract	SnatchBot Form	N/A	Structured data
2		Extract	Outlook	N/A	Structure data
3		Extract and Click	ServiceNow Instance	N/A	Structured data

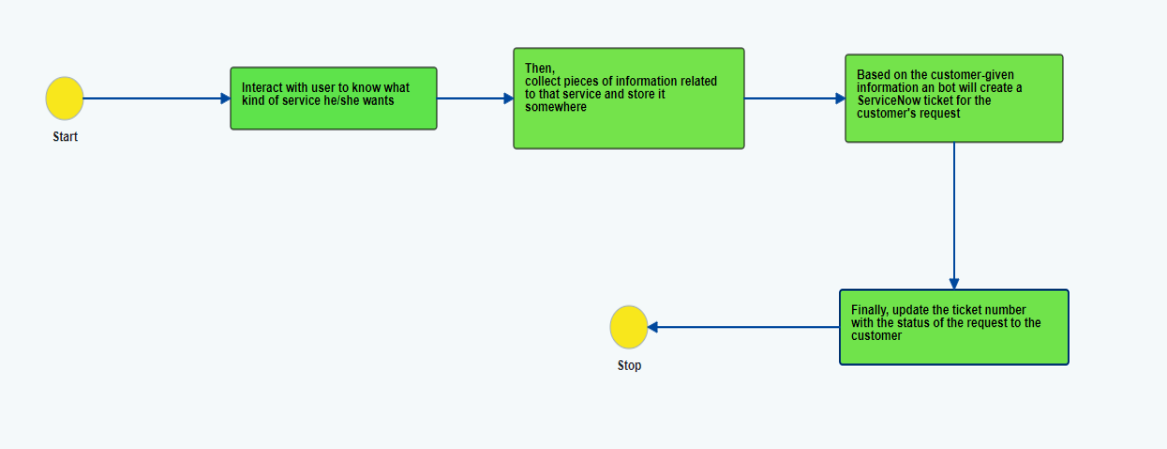
III. TO BE PROCESS DESCRIPTION

In this section the proposed improvements to the process, actions to the process will be outlined as well as the actions proposed for automation and the type of robot required. **This will be cross-checked by the Solution Architect.**

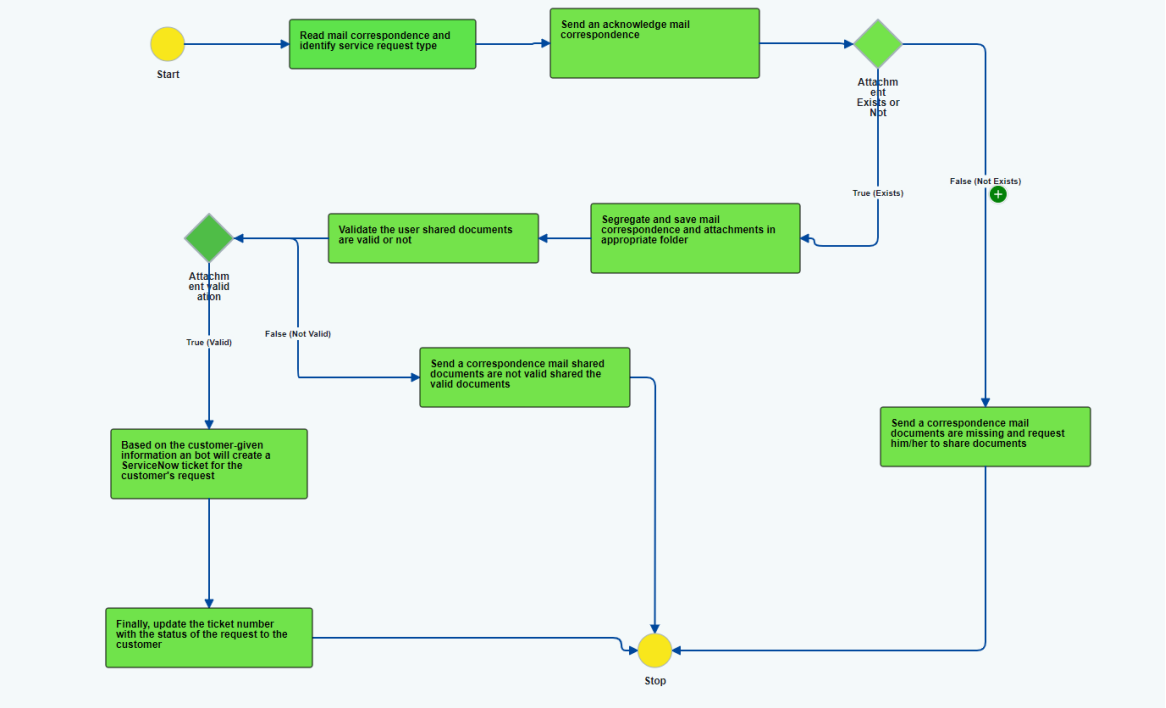
3.1. Detailed TO BE Process Map

A detailed process map of the process as it will look like post-automation will be outlined here.

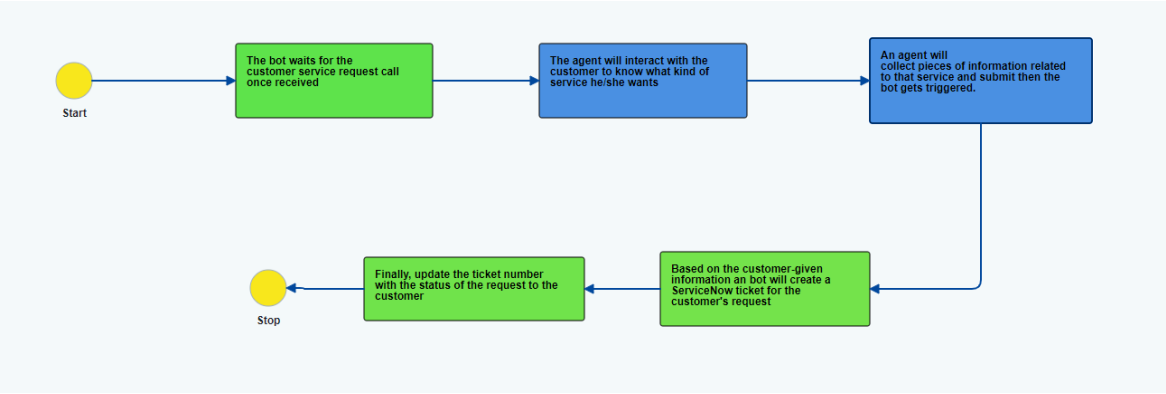
Service via Chatbot (Chatbot Bot)



Service via Email (Email Bot)



Service via IVR Call (Voice Bot)



3.2. Parallel Initiatives

The table below will capture the proposed Business, Process or Application changes to be made in the near future that would impact the process at hand (if any).

Initiative Name	Process Action(s) where it is identified	Impact on current Automation Request	Expected Completion Date	Contact Person
N/A	N/A	N/A	N/A	N/A

3.3. In Scope For RPA

The actions in scope for RPA should be listed below:

Step	Short Description
1.1	Read mail correspondence and identify the type of service request
1.2	Download mail correspondence and attachments
1.3	Store it local folder of your system
1.4	Digitize and Validate the user-shared documents
1.5	Create the ServiceNow ticket to user request
1.6	Update the ticket number and status to user via mail correspondence

3.4. Out Of Scope for RPA

The actions **out of scope** for RPA should be listed in the table below together with the reasoning.

Activity/Action*	Reason for out of scope	Impact on the TO BE	Possible measures to be taken into consideration for future automation.
N/A	N/A	N/A	N/A

3.5. Exceptions Handling

The Business Process Owner and Business Analysts are expected to document below all the business exceptions identified in the automation process. Exceptions are of 2 types, and both need to be addressed:

Known exceptions = previously encountered. A scenario is defined with clear actions and workarounds for each case.

Unknown = New situation that was not encountered before. It cannot be predicted and in case it happens it needs to be flagged and communicated to an authorized person for evaluation.

3.5.1. Known Business Exceptions

Details regarding how the robot should handle the exceptions.

Exception Name	Action	Parameters	Action to be taken
N/A	N/A	N/A	N/A

3.5.2 Unknown Business Exceptions

An umbrella rule that includes a notification needs to be designed for all other exceptions that could happen and cannot be anticipated.

3.6. Applications Errors & Exceptions Handling

A comprehensive list of all errors, warnings or notifications should be consolidated here together with the action to be taken for each by the Robot. There are 2 types of exceptions/errors:

Known = Previously encountered and action plan or workaround available for it (e.g., SAP unresponsive during peak times)

Unknown = these are exceptions and errors that cannot be anticipated but for which the robot needs to have a rule so that the RPA solution is sustainable.

3.6.1. Known Applications Errors and Exceptions

Details regarding how the robot should handle the exceptions.

Error/Exception Name	Action	Parameters	Action to be taken
N/A	*N/A*	*N/A*	*N/A*

3.6.2. Unknown Applications Errors and Exceptions

An umbrella rule that includes a notification needs to be designed for all other exceptions that could happen and cannot be anticipated.

3.7. Reporting

In this section all the reporting requirements of the business should be detailed so that when the RPA solution is moved to production the administrators can track the performance of the solution.

Report Type	Update frequency	Details	Monitoring Tool to visualize the data.
N/A	N/A	N/A	N/A

IV. OTHER

4.1. Additional sources of process documentation

If there is additional material created to support the process automation please mention it here, along with the supported documentation provided.

Additional Process Documentation		
Video Recording of the process (Optional)	N/A	N/A
Business Rules Library (Optional)	N/A	N/A
Other documentation (Optional)	N/A	N/A
Standard Operating Procedure(s) (Optional)	N/A	N/A
High Level Process Map (Optional)	N/A	N/A
Detailed level process map (Optional)	N/A	N/A
Work Instructions (Optional)	N/A	N/A
Input Files (Optional)	N/A	N/A
Output Files (Optional)	N/A	N/A