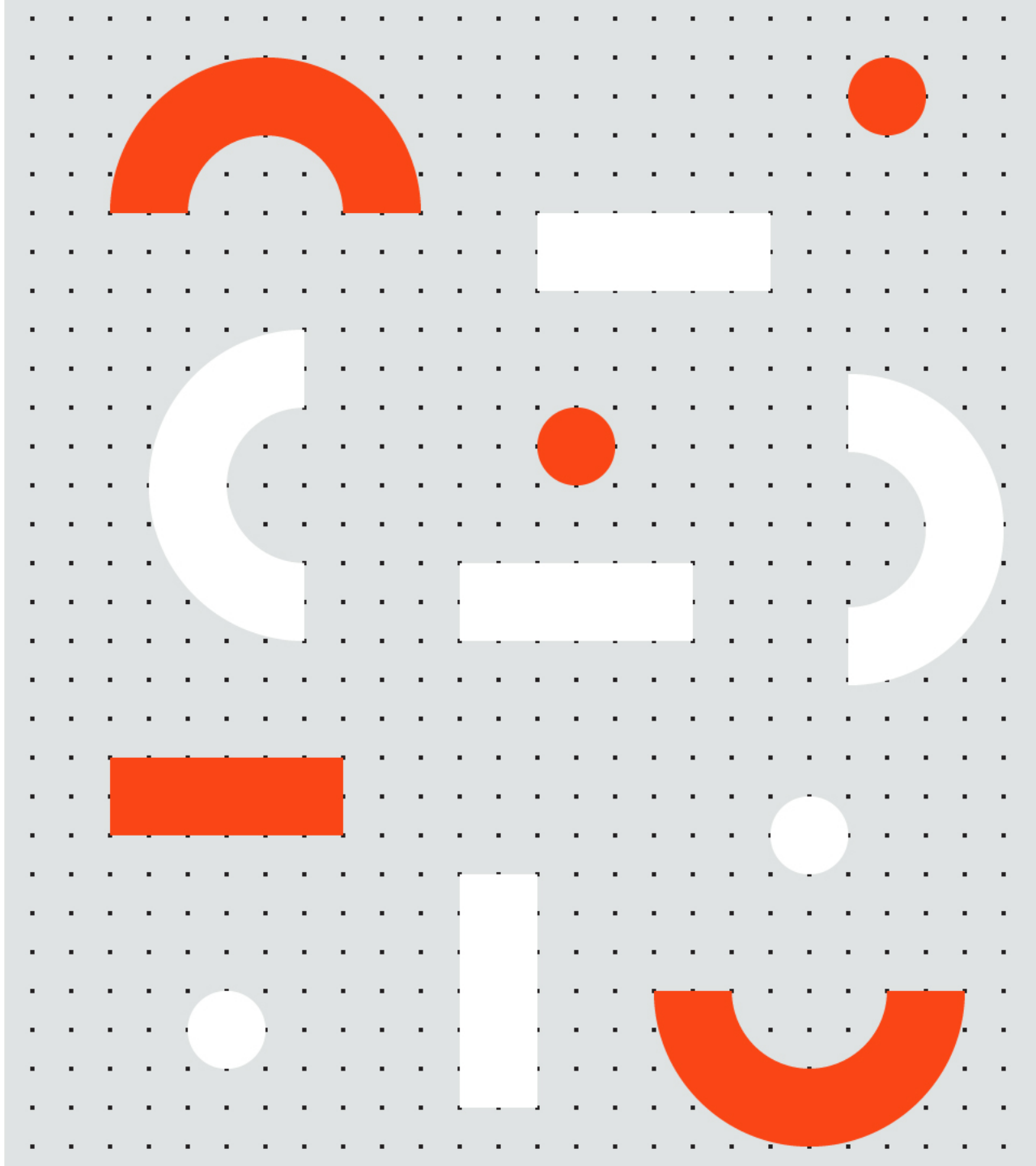


Business Analyst Training

Prepare RPA



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Aim & Approach



Prerequisite

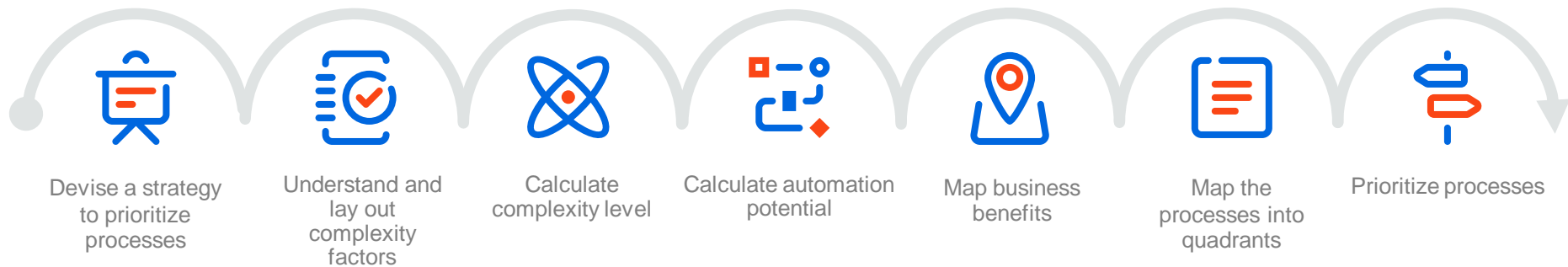
- The senior management and the Business Unit leaders need to provide a process backlog, a high-level description of the processes at the organizational level (using organizational charts), as well as the list of stakeholders to interview for each process



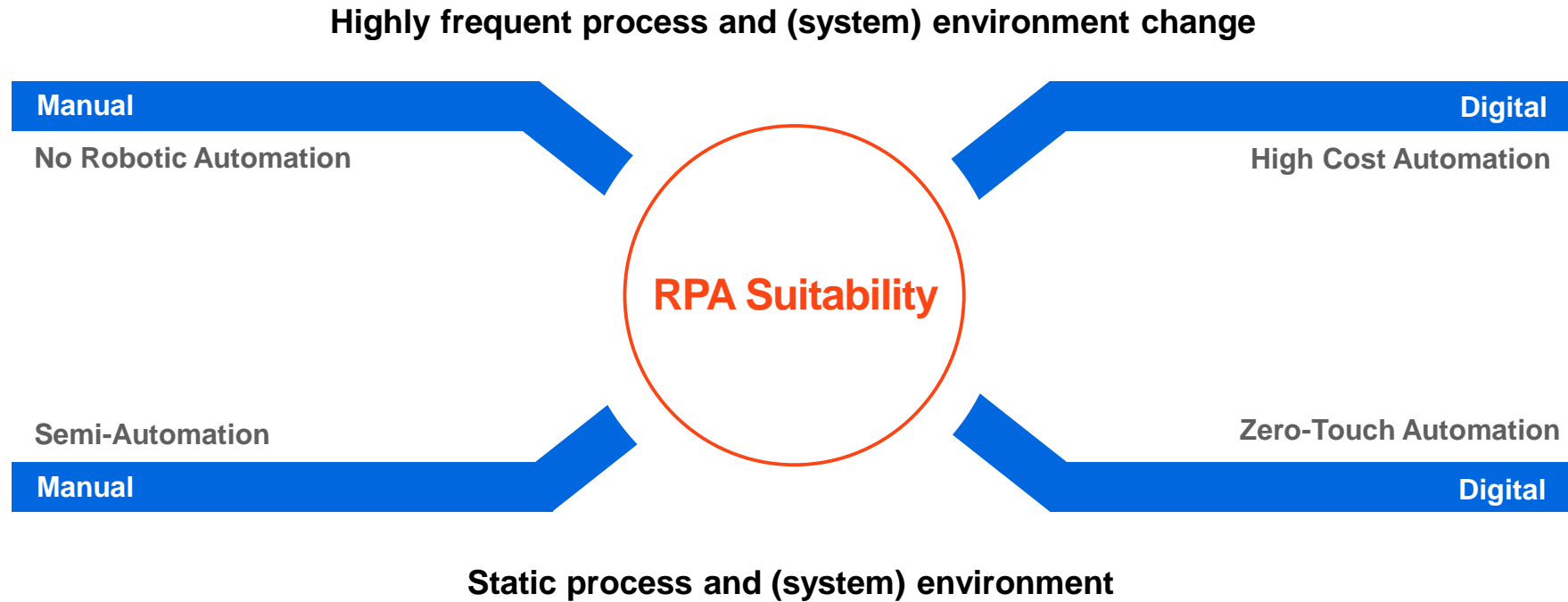
Aim

- Calculate and understand the automation complexity of the in-scope processes
- Calculate and understand the automation potential of in-scope processes
- Map the automation benefits (tangible & intangible benefits)
- Map the processes into automation quadrants in order to prioritize in-scope processes

Approach



Determining RPA Suitability



Organization Wide Assessment



Complexity

- Defined as Low (<35%), Medium (35-65%) and High (>65%)
- Derived from 4 key parameters:
 - type of input method
 - percentage of free text
 - type and number of applications involved
 - number of screens involved



Potential FTE Savings

- Yields a high-level Potential FTE Benefits and automation percentage
- Derived from 4 key parameters:
 - percentage of rule-based steps
 - type of input method
 - free text requirement
 - process type



Automation Quadrant

- Derived as a matrix based on Process Complexity and Potential Benefit (High / Medium / Low)
- Establishes 4 categories:
 - Quick Wins
 - Low Hanging Fruits
 - Must-Do Improvements
 - Long-Term Improvements

Complexity Factors

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

Type of Applications – Java applications, Mainframe applications, Web based applications, .NET applications, MS Office etc.

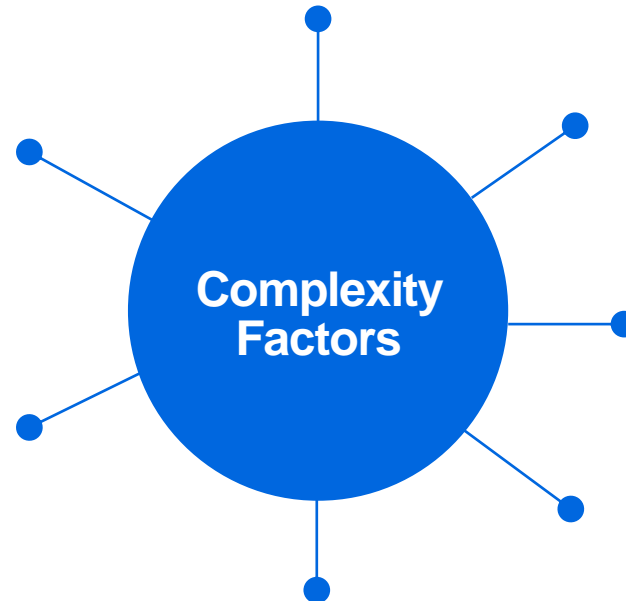
Standard Inputs – Templated inputs, same format or type of inputs across cases

Structured Inputs – Machine readable and digital inputs; scanned PDF images

Unstructured Inputs – Flow of information as free text (unstructured informational flow) within the process

Image based automation – VDI / remote desktops

Variations / Scenarios within the process
(number of *If Else* kind of rules)



Defining Automation Complexity



Low

- 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)
- Development time: **1-2 weeks**



Medium

- A **MEDIUM** complexity automation project could be one that requires the transfer of data between applications
- Development time: **3-4 weeks**



High

- 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, terminal emulators
- Development time: **4-6 weeks**

Factors Driving Automation Potential

Rule Based

- Agent/user doesn't use their experience to make any decisions while processing a case. Decisions are made based on business rules and pre-defined logic

Process Type

- **Manual & Repetitive** - A process which is performed by users and most of the process steps are the same for all cases or transactions
- **Semi-Manual & Repetitive** - A process which is performed by users and also involves an automation mechanism like Macro, Outlook plug-ins, etc.
- **Automated** - A process which is already automated
- **Manual but Not Repetitive** - A process which is performed by users. Also, the process steps for each case will be different

Standard Input

- Inputs are **Standard** - Inputs are standard if the content is positioned in the same place even if the input types are different. E.g. in an invoice, the position of the details (invoice number, date, amount, name etc.) are always fixed, regardless of the input type (PDF, Word etc.)
- Inputs are **NOT Standard** - Inputs are considered as non-standard when the position of the content varies from one input type to another


Process Expected to Change

- Are processes or applications used to process a case going to change within 3 - 6 months? (E.g. major upgrade of ERP systems, process re-engineering etc.)


Unknown Exceptions %

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


Business Benefits




Cost savings – RPA ensures cost savings through FTE reduction




Productivity Gain – Increase in processed volumes within the defined unit time, coupled with a decrease in turnaround time and an improved AHT




Business Agility – Enabling businesses to act at a faster pace than before




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



Compliance – Ability to comply to regulatory requirements

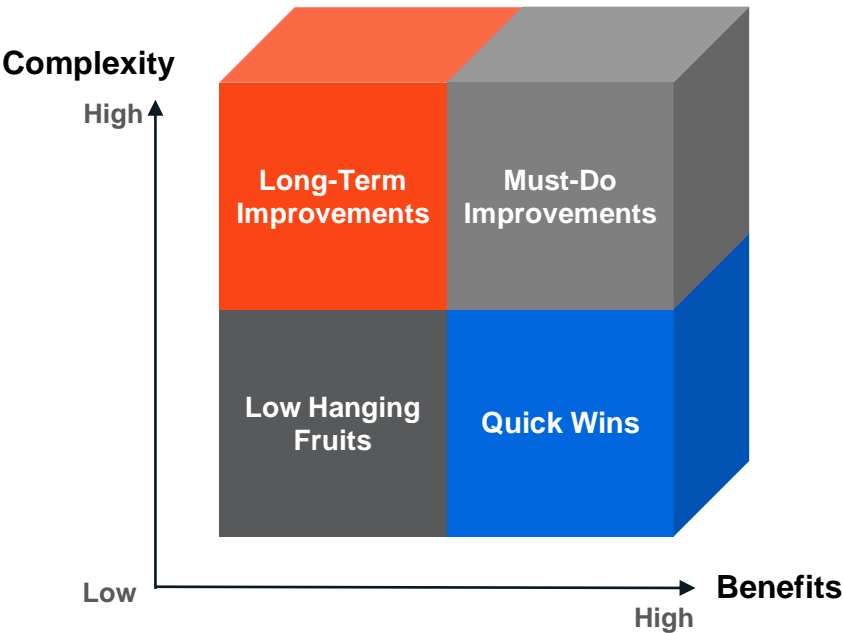


Customer Satisfaction – Automation leading to customer satisfaction (Example: contact center automation, resolving customer inquiries at a faster pace)



Flexibility – If there is an unexpected spike in volume, robots enable you to scale up or down as required

Automation Quadrant Derivation



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 Improvement
High	Medium	Must-Do Improvement
Medium	Low	Long-Term Improvement
High	Low	Long-Term Improvement



Additional process prioritization factors like business reasons (e.g. foreseeing spikes in volume), regulatory & compliance reasons or parallel initiatives also need to be considered

Implementation Strategy

	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 showcase	Close Quick Wins	Close Quick Wins and Low Hanging Fruits	Close Must-Do Improvements	Close Quick Wins, Low Hanging Fruits and Must-Do Improvements
Activity	Create Value Proposition showcase	Increase confidence and buy-in	Ensure industrialized automation deployment			Hand over Long-Term Improvements
Activity	Highlight risks and org. change management impact	Prepare employee experience showcase "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

INPUT

- Are inputs standard?
- Data input type
- Does this process require reading of scanned images or handwritten documents?
- Does the process require reading of free text?

PROCESS METRICS

- Number of FTE's
- Number of Cases / Transactions
- Process Frequency
- AHT
- Number of steps

PROCESS DESCRIPTION

- Language
- High-level description
- Is there a quality check in place?
- Is the process manual & repetitive?
- Is the process rule based?
- Is the process or system expected to change within the next 3-6 months
- Percentage of unknown exceptions

IT ENVIRONMENT

- Technology / System Constraints
- Are there any steps in the process which are already automated?
- Is there a test environment available?
- Application access via VDI / Remote Desktop?
- Number of applications

Thank you

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