UiPath

Implementation Methodology
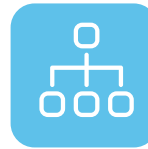
OPPORTUNITY ASSESSMENT

What Process Should I Automate?

Guide to Choose the Best Candidate Processes for Automation

Highly manual and repetitive processes
- High transaction volume processes
- Highly frequent processes running daily, weekly (instead of monthly or yearly, which involve lots of manual work or work prone to human error)

Processes with standard readable electronic Input Type
- Triggered by standard and consistent inputs. The inputs should be in a readable input type like Excel, Word, email, XML, PPT, readable PDFs etc
- Triggered by input types which are not readable (scanned images with no OCR are not prone to automation.)

Changeable Processing Method or System Change
- The processing method cannot be changed
- Fundamental changes are not required in the underlying technical architecture of the current systems (e.g new interface development or changes in configuration for existing systems to enable automation)
- **We strongly recommend to avoid automating a process that will be changed in the short term**

Rule-Based Processes
- Activities with clear processing instructions (template-driven), with decision making based on standardized and predictive rules

High Volumes
- Processes with high transaction volumes (and high frequency).

Automation Savings
- It's recommended to automate only the processes that can provide a saving in terms of human work-effort of minimum 2 FTEs

Low Exception rate
- Activities with low number of variation scenarios existing in the process leading to different handling procedures
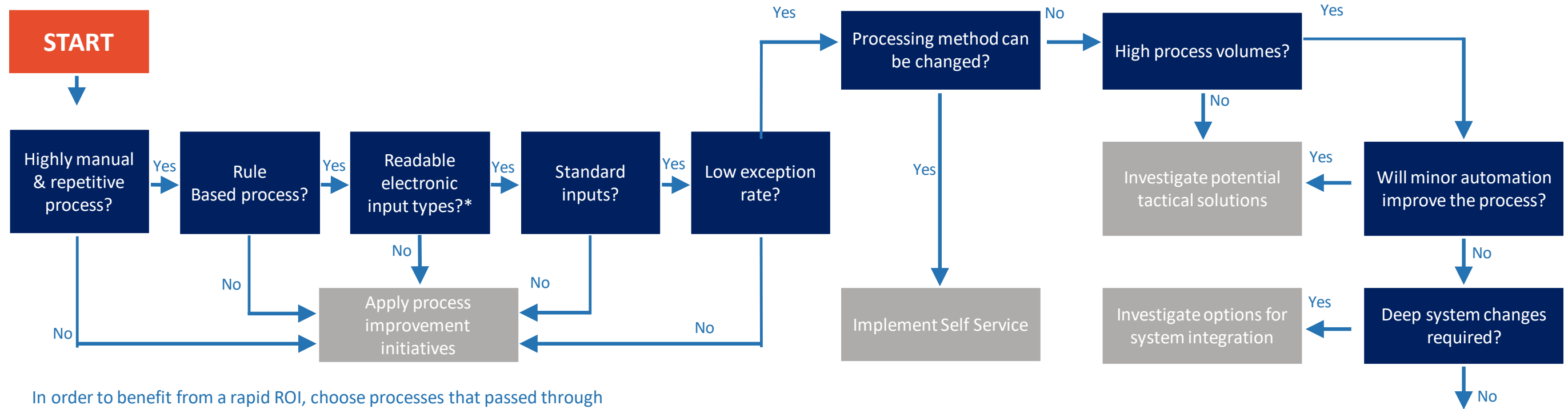
Mature and stable processes
- **Well documented**, **stable**, **predictable**
- Known operational costs
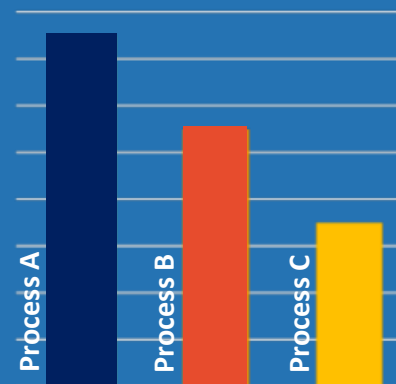
What Process Should I Automate?

Guide to Choose the Best Candidate Processes for Automation

START

- Highly manual & repetitive process? — Yes →
- Rule Based process? — Yes →
- Readable electronic input types?* — Yes →
- Standard inputs? — Yes →
- Low exception rate? — Yes → Processing method can be changed?
  - Processing method can be changed? — No → High process volumes?
    - High process volumes? — Yes → Will minor automation improve the process?
    - High process volumes? — No → Investigate potential tactical solutions
    - Will minor automation improve the process? — Yes → Investigate potential tactical solutions
    - Will minor automation improve the process? — No → Deep system changes required?
      - Deep system changes required? — Yes → Investigate options for system integration
      - Deep system changes required? — No → **RPA**
  - Processing method can be changed? — Yes → Implement Self Service

- Highly manual & repetitive process? — No → Apply process improvement initiatives
- Rule Based process? — No → Apply process improvement initiatives
- Readable electronic input types?* — No → Apply process improvement initiatives
- Standard inputs? — No → Apply process improvement initiatives
- Low exception rate? — No → Apply process improvement initiatives

In order to benefit from a rapid ROI, choose processes that passed through a **transformation initiative** using the **Lean Six Sigma methodology.**

Process Characteristics	Process A	Process B	Process C
Highly Manual and Repetitive work			
Rule Based Processes			
Electronic Readable Input Types			
Standard Input Types			
Low Exceptions Rate			
High Volume Transactions			
System changes			

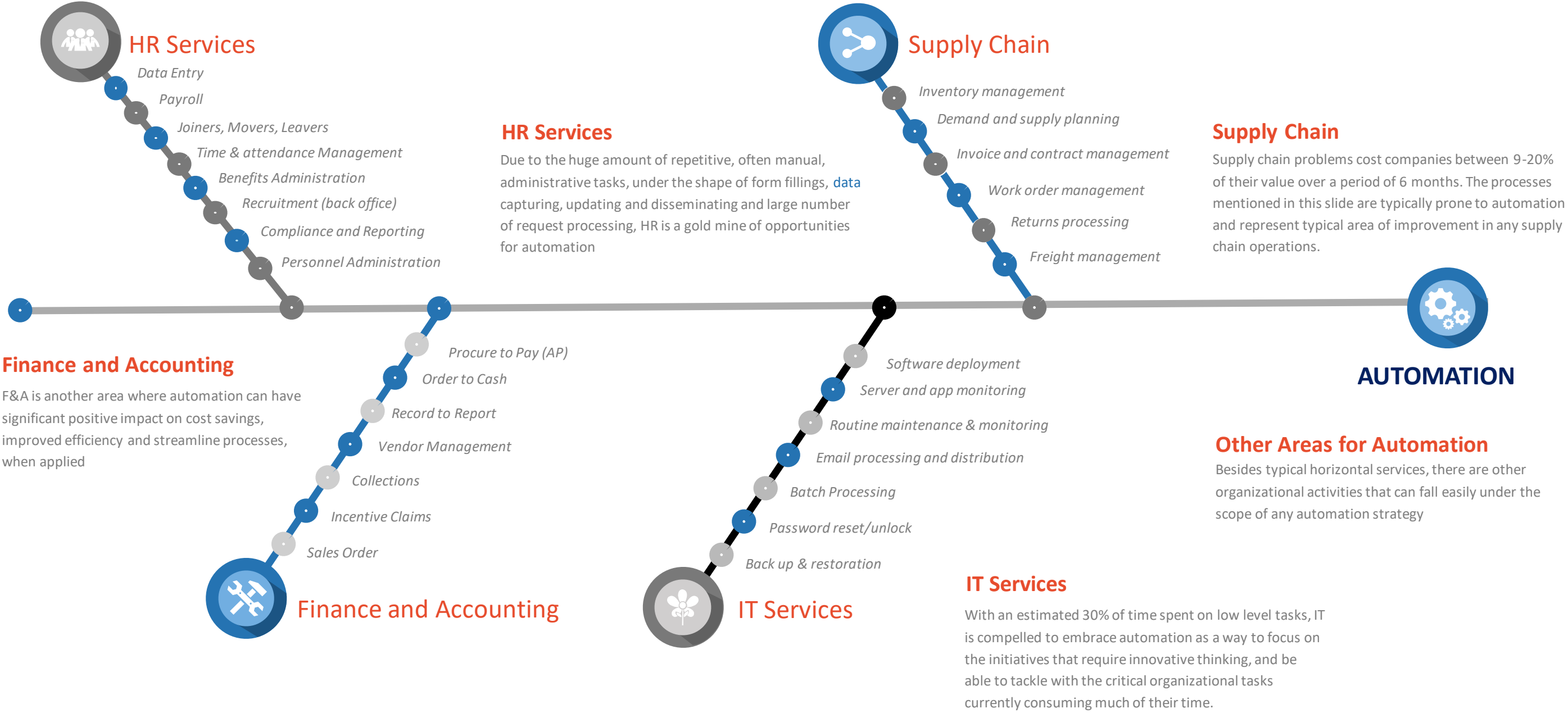AUTOMATION SCALE — Process A, Process B, Process C

Process A is the best fit for automation, followed by **Process B,** while **Process C** should be subject to a Lean Six Sigma transformation approach prior to considering automating it.

* Readable Input Type = Excel, Word, email, XML, PPT, readable PDFs etc. Non-readable input type: scanned image with no OCR

Processes Every Company Should Automate

HR Services

- *Data Entry*
- *Payroll*
- *Joiners, Movers, Leavers*
- *Time & attendance Management*
- *Benefits Administration*
- *Recruitment (back office)*
- *Compliance and Reporting*
- *Personnel Administration*

HR Services

Due to the huge amount of repetitive, often manual, administrative tasks, under the shape of form fillings, data capturing, updating and disseminating and large number of request processing, HR is a gold mine of opportunities for automation

Supply Chain

- *Inventory management*
- *Demand and supply planning*
- *Invoice and contract management*
- *Work order management*
- *Returns processing*
- *Freight management*

Supply Chain

Supply chain problems cost companies between 9-20% of their value over a period of 6 months. The processes mentioned in this slide are typically prone to automation and represent typical area of improvement in any supply chain operations.

Finance and Accounting

F&A is another area where automation can have significant positive impact on cost savings, improved efficiency and streamline processes, when applied

Finance and Accounting

- *Procure to Pay (AP)*
- *Order to Cash*
- *Record to Report*
- *Vendor Management*
- *Collections*
- *Incentive Claims*
- *Sales Order*

IT Services

- *Software deployment*
- *Server and app monitoring*
- *Routine maintenance & monitoring*
- *Email processing and distribution*
- *Batch Processing*
- *Password reset/unlock*
- *Back up & restoration*

AUTOMATION

Other Areas for Automation

Besides typical horizontal services, there are other organizational activities that can fall easily under the scope of any automation strategy

IT Services

With an estimated 30% of time spent on low level tasks, IT is compelled to embrace automation as a way to focus on the initiatives that require innovative thinking, and be able to tackle with the critical organizational tasks currently consuming much of their time.

Best practices and lessons learned

Process assessment forms can be distributed over email. Alternatively, specialized tools can be used for this.

Tips for the interview:

Interview team:
- Composed of 2 members: one asks the questions, one documents the result
- Choose the right persons to be interviewed:
- The SME is the interviewee– having best knowledge on the detailed process, not the manager
- If the process is replicated in more teams (see 100 branches from a bank), the candidates should be chosen by following benchmarks: sample of relevant teams; best SMEs chosen by their managers

Others:
- The process metrics (FTE, AHT, etc) should be collected separately by the internal Business Analysts
- Group the interviews if more processes are performed by the same team

Note:

In some cases, team managers can exclude processes with high potential of automation. Instead, processes with lots of issues are promoted – these could be analyzed and addressed via other tools
If any process is excluded it should be listed and documented along with the reason for which it was dismissed

Possible challenge:
- Poor understanding of how the process looks
- Lack of process mapping (E.g.: procedure vs process)
- Identification of grouping criteria of the processes:
  - By geography (E.g.: grouping in 4 regions)
  - By business units (E.g.: grouping in 5 main BU)
  - By procedure

Process Inventory:
- Client to create a list with all processes and minimum info that can be collected on the template

Important: No process should be excluded from the list

Possible risks:
- Poor planning
- Poor communication of the scope of the exercise to the SMEs
- Previous failed measures to improve the processes to be assessed
- Poor quality of the data collected
- SMEs unavailability
- Delays in collecting the metrics
- The client rejecting the methodology used