# Robotic Process Automation: Eight Guidelines for Effective Results

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## Summary

Stop your RPA projects from going off track — or worse, failing to solve problems they were never capable of fixing. Enterprise architects and technology innovation leaders should use this guide to position their RPA projects for success.

## Overview

### Key Challenges

- Tactically focused RPA projects may improve quality and decrease activity cycle times by assisting or removing labor in or from activities. Cost reduction by eliminating head count is cited as a benefit of RPA; however, if employees are moved to other tasks, this area of cost reduction is not always achieved as planned.
- The proliferation of automation and artificial intelligence tools and options continues to grow, which introduces a steep learning curve and general confusion around the term "RPA," along with the benefits it presents.
- One tool is unlikely to solve every unautomated activity in your organization.

### Recommendations

Enterprise architects and technology and business innovation leaders must:

- Identify and quantify the opportunities to use RPA for revenue-generating activities in addition to cost-saving or compliance activities. Don't just focus RPA on reducing labor costs. Carefully set expectations of what the tools can do and how your organization can use them to support digital transformation as part of an automation strategy.
- Start with rule-based, standardized processes that cross multiple systems, which need a nonintrusive approach to automation. Evaluate RPA opportunities where you have people acting as "swivel chair integration" — rekeying data between systems — and where work is being performed by humans that involves structured, digitalized data processed by predefined rules. This analysis forms the basis for your enterprise automation roadmap.
- Identify alternative existing tools or services, which already have a significant proportion of the functionality required at a suitable price point; evaluate these solutions in parallel with RPA, or as a hybrid solution; and look to future artificial-intelligence-based options.

# Strategic Planning Assumptions

By 2020, automation and artificial intelligence will reduce employee requirements in business shared-service centers by 65%.

By 2019, process automation will have limited impact on top-line growth for 50% of organizations that will erroneously focus on labor reduction, not on improving business outcomes.

# Introduction

## Capitalizing on RPA

Business stakeholders are excited by the potential of a tool to reduce costs, increase accuracy, improve compliance and automate work in a fraction of the time and cost of typical IT software deployments. The expectations of robotic process automation (RPA) are as large as the confusion about the technical capabilities of the RPA tools themselves. Understanding the functionality of RPA versus artificial intelligence is challenging, as business and IT are muddling the terminology, potential and reality of a new swathe of tools. Most organizations have a vast amount of tasks that are not automated for a multitude of reasons. RPA tools offer potential ways to automate all or some stages of manual rule-based processes that were previously not automated.

The most important first step is figuring out which use cases could be best solved by RPA. Having evaluated this — either alone or with the support of consultants, system integrators and business process outsourcing (BPO) companies — enterprise architects and technology innovation leaders can start to map automation needs to the RPA software available in the market and their partner service providers.

Here, we outline eight guidelines to help maximize your use of RPA, while remembering that it is not a silver bullet for all of your organizational challenges and that one tool will not automate all your processes. For a background on RPA, see "Use Cases for Robotic Process Automation: Providing a Team of 'Virtual Workers'" and "Hype Cycle for Business Process Services and Outsourcing, 2016." A Market Guide to RPA tools will be published this quarter.

## Definition of RPA Software

RPA tools are designed to mimic the same "manual" paths taken by a human by using a combination of user interface (UI) interaction or descriptor technologies. An RPA tool operates by mapping a process for the software "robot" to follow via computer pathways and various data repositories, so RPA can operate in place of a human. An RPA tool can be triggered manually or automatically, move or populate data between prescribed locations, document audit trails, conduct calculations, perform actions and trigger downstream activities.

RPA tools range from solutions that operate on individual desktops with limited ability to take different data feeds to ones that operate on enterprise servers that are able to perform multiple scheduled tasks and meet enterprise security criteria. Some can provide detailed process analytics. RPA tools will evolve over time to offer a variety of functionalities. RPA may be linked to other tools in a software vendor's product suite with artificial intelligence.

## Is It RPA or RPA "Washed" — Should You Care?

Many tools are coming to the market under the banner of RPA; however, most of the tools do not meet all of the same criteria. These tools can have very similar functionality, regardless of how they are actually deployed. Initial definitions state that RPA tools should include the following:

- RPA tools have their own metalanguage with a GUI that is easy for businesspeople to use. Several RPA tools have the script designed in a GUI or a process modeling tool, which a business user could use with limited training and IT involvement. However, for some tools calling themselves RPA, coding knowledge is necessary, as you need to use programming languages. Note that there are limited "scripting/coding" best practices, and these do not come with a tool.
- RPA tools need no or very limited IT integration. However, a range of IT involvement is required based on the type of tool, varying from light touch — in which IT provides access to virtual desktops, servers and passwords — to others, in which you need full integration for deployment.
- RPA tools allow you to sequentially run multiple processes with one bot. Others tie the bot to a specific process, which is a variant of this proposition.

- RPA tools with a record button will build a basic script of the "happy path," or one way to do a process, which can then be edited. There is unlikely to be one happy path for your processes, and it is much more likely that there will be multiple exceptions, which is why a cautious approach should be taken with record-button functionality.

Table 1 outlines the list of the various sources of RPA tools. If you have existing relationships with these vendors, this is an interesting starting point to learn about the tools. Various vendors have different strengths in attended or unattended modes, links to artificial intelligence tools, dashboard capabilities and ease of scripting topics, which will be addressed in future Gartner research publications.

**Table 1.** Indicative Listing of Types of RPA Tool Vendors

| RPA Specialist Software Providers | Multiple Software Offerings, Including RPA | IT and BPO Service Providers That Own Proprietary RPA Software |
|---|---|---|
| Automation Anywhere | Jacada | Infosys AssistEdge |
| Blue Prism | Kofax Kapow | Syntel |
| Epiance | Nice | Tech Mahindra |
| Exilant | Pegasystems | Xerox (soon to be Conduent) |
| OpenConnect | Verint | |
| Kryon Systems | Redwood Software | |
| UiPath | WorkFusion | |

*Source: Gartner (October 2016)*

# Analysis

## Guideline 1: Formalize an Enterprise Automation Roadmap

Many organizations rush to select RPA software and start a project. Learning about RPA suitability and functionality should be done in conjunction with building a broader enterprise automation roadmap (EAR). The EAR should highlight all of the places where the manual rekeying and consolidation of data take place, and whether this can be automated with commercial off-the-shelf (COTS)

software, if the process needs to include people, or if the process requires a different combination of solutions (see Note 1). One tool is unlikely to solve every unautomated activity in your organization, and multiple types of machine learning, artificial intelligence and automation tools will become available.

To avoid people failing to solve problems — which the RPA tools were never capable of fixing — or RPA being used less than optimally, or if better tools exist for the issue, then you need both a good understanding of what RPA tools can actually do, as outlined in our definition, and a view of the options to solve this issue. All of this should be collated in an EAR.

Start by circulating a clear list of the benefits and limitations of RPA to business unit leaders (see "Use Cases for Robotic Process Automation: Providing a Team of 'Virtual Workers'" ) and to anyone proposing to use RPA. Much of the disappointment with RPA stems from applying the tools in less than optimal ways; putting barriers between the tools and the data; applying it to the wrong processes; or using RPA to fix bad practices, which should and could have been dealt with in other ways, such as buying a dedicated piece of software or service, or even eliminating the process.

In the case of RPA, consider the following:

- Which processes are suitable for RPA?
    - Processes that are most suited for RPA have a high transaction throughput of structured digitalized data, with relatively fixed processing paths and/or user interfaces, which do not change frequently, and are rule-based activities. RPA tools work best when they have direct access to the data and applications. Thus, processes are more suitable for RPA if they have little or no need for remote access tools. Processes with unstructured data are not suitable for most RPA tools. If possible, turn data into standardized forms with no unstructured text. Processes that are rule-based can be suitable for RPA, even if they are not performed regularly.
- Is there COTS software that already has a solution for the activity you are trying to automate?
    - Several organizations are attempting to use RPA for payroll, order entry translation, accounts receivable and reconciliation although alternative software and/or business process services already exist for these functions. Explore if packaged software or services already exist that could deliver quicker deployments than spending six to eight months capturing and rethinking process rules and putting them into an RPA tool. Considerations here include the functionality, time to working solution, price per user and quality.
- Do you need external help to choose processes, build an EAR, and evaluate and deploy tools? Do you have enough cost-saving opportunities to warrant hiring consulting service support?
    - If you have a large number of unautomated activities or old systems, then a fresh approach and insight into the technologies could warrant external support, and could enable a faster time to solution. Be careful to balance the use of

external guidance and not erode all cost-saving potential. Consider using external resources for a limited time to build up internal capabilities and transfer knowledge for a faster start if needed.

- How will you tackle organizational areas with suboptimal business performance?
    - Typically, less standardized ways of enacting a task or process pose a risk, as the degree of change/improvement will be much greater for those areas. However, these may be the very business areas that are most in need of new solutions and improved business capabilities. Poor processes can be automated, but it is better to improve the process first.
- How will you handle company politics?
    - Do not ignore internal company politics because it exists in all enterprises. RPA projects could raise the organization's political temperature because they trigger common obstacles regarding status, belief, control and resources. Identify the political obstacles in your organization and determine how to navigate through or around them, especially if the overall automation plan could lead to people's roles changing.
- What is your plan for building ongoing monitoring of the robot's activities? What do you do if the RPA tool stops?
    - If something happens that causes the robot to stop running, you need to understand the business implications of it stopping for different time periods and have a strategy for continuous monitoring. Conduct a risk assessment for RPA deployment.

Several means exist to overcome risks; choose the approach that will be most effective in your organization. Examples include:

- Questionnaires, surveys and process discovery tools can be completed by all business units and heads of corporate functions about which tasks are manual, repetitive and use digital data. For example, where would insight be gained if you could hire an army of workers to investigate contractual compliance for tariffs or suppliers or buyers? This is where RPA can be evaluated as a revenue-generating or revenue-recouping tool. Questions to discuss include: Why are you embarking on RPA? What do you want to accomplish and by when? How will you do it, and how will it impact your people?
- Cost-saving and revenue-generating opportunities need to be seen in light of the total operations. For example, if you have a high number of "swivel chair processes," errors from people rekeying data can generate significant volumes of client, employee or supplier calls, emails or complaints about other business functions. If RPA is applicable to the process, then the implications of increased quality need to be considered.
- Calls or in-person workshops with key stakeholders — for example, global business process owners and internal auditors — may be needed to explain: that one tool does not solve every unautomated process in your organization; how to prioritize efforts for different types of automation (that is, use a tool designed for the job first, such as payroll or order entry); the importance of managing the master data associated with your processes; and that RPA tools work best with direct access to data and

applications. Also, automating a bad process does not make it better, but may make it less expensive to execute in the short term — if you remove people. However, the overall goal should be to evaluate how to make the process more effective and efficient.

Over time, many new options to improve processes will arise, including ERP vendors adding more functionality, artificial intelligences in the guise of virtual procurement bots, virtual assistants and virtual contact center agents — which will revolutionize the role of humans in the workplace. Many automation options are available, as shown in Figure 1.

**Figure 1.** Automation Options

iBPMS = intelligent business process management suite

*Source: Gartner (October 2016)*

The action here is to formalize building an EAR while evaluating RPA tools. Find out what has not already been automated throughout the organization. This list of unautomated tasks forms the basis of your EAR as to whether you delete the process, automate it with a tool, add artificial intelligence capabilities to the task, leave it as a manual task or use a combination of the above.

For example, a goal in some types of transactional business processes is to achieve zero manual touch. Touchless processing and many technology and process redesign activities will get you there; this roadmap will help you prioritize projects and provide tool selection guidelines. It is imperative that automation initiatives are part of wider digital business plans and an automation roadmap. Therefore, be clear on what RPA is and what it is not. RPA is being used:

- As an integration tool, almost the closest thing to building an API
- To supplement people's activities
- To replace people
- As a three- to five-year solution or a steppingstone to another IT deployment

RPA is becoming a way to re-evaluate whether humans need to be in the process, but is not necessarily the endpoint.

## Guideline 2: Aspire for Revenue Generation, but Act on Short-Term Results Rapidly

So far, in RPA adoption, the benefits are often articulated on how RPA will cut costs by eliminating the need to rekey digitalized data, removing rekeying errors in structured data, allowing higher-quality processes and increasing customer satisfaction with fewer calls to call centers about errors. Also, the RPA tool can contribute to generating a desired outcome quicker than before, both in the relatively short time to deploy the software and in speeding up the process. In addition, cost reduction by reducing the head count is cited as a

benefit; however, the employees are typically moved to other tasks, so cost reduction is not always achieved as planned in this business case.

Key scenarios for process improvement can be as broad as procure-to-pay, planning, order-to-cash or pick-pack-ship. They can be specific to an industry, such as quality and certification processes in a pharmaceutical company, or more generic, such as treasury management. Identify scenarios that ensure that selected (and deployed) RPA solutions will enable the most critical business capabilities. In the RPA select phase, these scenarios should be used as parameters to focus and stretch the potential RPA vendors' solutions during demonstrations of their solutions. The scenarios enable the RPA selection team to evaluate if the solutions fit their intended purpose.

Short-term potential results:

- Time to production of the tool and deployment times range from a couple of months to a year.
- Customer satisfaction increases due to fewer errors, swifter service and more activities being available online.
- Process improvements occur such as better quality and improved turnaround times, standardization and audit trails.
- Cost reductions can be achieved from measuring total process costs, such as lower organizational costs from reduced rekeying errors, improved analytical insights or if people are redeployed.

Revenue-generating potential results:

- What is the greatest contribution that an RPA tool could make to your organization in the next six to 12 months? How could you use RPA to generate new revenue opportunities to perform activities that were previously too expensive or difficult to achieve? Look for proof of value rather than proof of concept. Consider opportunities to collect more revenue than was possible before, such as improving debt recovery, tariff compliance or tax collections.

## Guideline 3: Formalize IT Teams' Involvement as Early as Possible to Maximize Business Outcomes

IT teams need to understand why RPA is different from other tools such as business process management (BPM), artificial intelligence and screen scraping tools (see Note 2). They also need to know what security and deployment plans are optimal to support evaluating and deploying RPA in its potential to deliver quick, short-term gains using existing user interface pathways. Developing a joint understanding between business and IT will facilitate a much quicker set of results and understanding of which tools are right for each scenario.

### Essential IT Involvement

IT essentials include:

- Looking out for system changes and performing system maintenance that could adversely impact the bots if they are planned or programmed to run 24/7
- Coordinating security, testing and audit data of the deployment in preproduction and postproduction
- Managing the loading of IT systems with RPA use; some RPA tools have built-in capabilities to pace their deployment in processes
- Spotting where forms could be built on the front end of processes to digitalize data
- Discussing any planned IT changes of systems that interact with RPA scripts and keeping scripts up to date
- Considering if the RPA tools should be hosted on-site, at a third-party data center or use specialized RPA hosting delivered as robots as a service
- Helping decide whether to use assisted automation and when to use unattended automation or dedicated software products
- Overseeing and incorporating password issuing and refresh strategies to meet business or regulatory compliance in RPA deployments
- Encouraging coding standards for RPA deployment to avoid suboptimal coding designs and product use

## Reasons IT Should Embrace RPA Concepts

- RPA can offer quick wins to the entire organization by improving customer, employee and supplier experiences of the IT systems, especially where many enterprise systems are deployed.
- RPA opens up a broader conversation about automating tasks in tools, as opposed to using people as swivel chair integration, and allows the business and IT to work together on professionalizing activities that are currently undermanaged, with limited sustainability as shadow IT deployments.
- RPA will allow organizations to automate established processes with the current applications and without the need for complex integration or IT coding. BPM deployments need IT developers and scrum teams (see "Use Cases for Robotic Process Automation: Providing a Team of 'Virtual Workers'" for the differences between BPM and RPA).
- More is yet to come — automation tools, artificial intelligence and RPA as a combined group of tools can achieve organizations' goals of optimizing business activities and address IT challenges in the digital age or fourth industrial revolution. Optimizing the use of such tools is essentially a team effort, which can no longer allow business activities to fall into the chasm between IT and the business. Perhaps think of RPA as a digitalized, process-ambivalent tool.

## Guideline 4: Create a Joint IT and Business RPA Team

In most organizations, process leaders are responsible for completing the processes but are not always aware of the technologies' capabilities to rethink processes, which is the knowledge that IT can bring. Therefore, RPA efforts need to be joint, working with a business process maturity model of the optimum way to complete a process in your industry. This optimal process execution will change dramatically over the next few years with the advent of artificial intelligences and digital business. This automation governance board will be responsible for balancing IT and business steps, as outlined in Table 2.

**Table 2.** Indicative RPA Team Actions

| Activity | Team Actions |
|---|---|
| Aligning RPA deployment to a wider EAR | Be smart about deploying quick-win RPA projects that have good ROI and will free up people. |
| Automated task and process ownership | Manage the library of scripts, index of connectivity of systems and the reuse of object code as applicable. Protect any useful IP related to the process. |
| Demand management | Manage demand from the business process owners. RPA should not be the default answer. Gather the current as-is costs for solutions that are already in use that would be replaced/eliminated by the execution of the RPA strategy. |
| Supply management | Evaluate and acquire the necessary skills, consultants, servers and software available to support RPA initiatives. |
| Coordinating working with BPO provider, SSCs and consultants | Understand the implications on existing and new BPO providers, or SSC delivery options. |
| Communication strategy | Decide when, how and if to communicate with the wider organization about how to leverage automation and how RPA tools work. |

**Table 2.** Indicative RPA Team Actions

| Activity | Team Actions |
| --- | --- |
| Regular future automation and artificial intelligence planning | Watch for new automation trends. Decide when to "kill" RPA projects and move on to other automation or application activities. |
| IP = intellectual property<br>SSC = shared-service center | |

*Source: Gartner (October 2016)*

## Guideline 5: Get External Help and Build Internal Skills for RPA

Several skills are required for starting and running an RPA. They include the ability to:

- Select suitable processes for RPA use.
- Decide and design optimal processes for RPA tools.
- Select whether RPA or another automation tool is the best answer.
- Select which RPA tool to use for which activity.
- Set up an RPA build, test and deploy environment.
- Build and rewrite scripts for the tool. These skills will vary depending on the chosen RPA tool as each has a different interface and the need for programming or IT knowledge varies by tool.
- Monitor runtime.
- Preserve the skills of the people who can spot automation opportunities and the skills of the people who can generate scripts, as these are not always the same skills or types of people.

To get started, it could make sense to employ the help of a consultant, a system integrator or use your existing BPO providers.

Multiple consulting and system integrator firms have launched RPA practices (see Table 3), some of which are part of a wider automation practice; others are part of a wider artificial intelligence practice. These companies can be used to support RPA product evaluation, "automatable" process evaluation, deployment and ongoing support of the tools. However, providers have different skills levels in the various RPA tools, and very few players have skills in each tool. Thus, they will make different recommendations regarding the different products and the work involved in deploying the products.

**Table 3.** Service Providers Deploying RPA

| **Specialist Independent RPA Consultancies and Deployment Assistants** | **Consulting, BPO and IT Outsourcing Providers** |
|---|---|
| • Alsbridge<br>• Genfour<br>• Mindfields<br>• Symphony<br>• Virtual Operations<br>• Thoughtonomy (SaaS for Blue Prism) | Accenture, arvato, Atos, Boston Consulting Group (BCG), Capgemini, Capita, Cognizant, Deloitte, Dell, Digital Workforce Nordic, eClerx, EY, Genfour, Genpact, HCL Technologies, Hexaware, HGS, Hewlett Packard Enterprise (HPE), IBM, id.mngmnt, Infosys, KPMG, Lateetud, McKinsey & Co., Miami Strategic Partners, Mphasis, Neoops, Premier Logic, Prodapt, PwC, Reveal Group, Solai & Cameron, Sopra Steria, Sutherland Global Services, Syntel, Tata Consultancy Services (TCS), Tech Mahindra, Telesis Data Solutions, The Burnie Group, UST Global, VirtusaPolaris, Voyager Solutions, Weber Solutions, Wipro, WNS, Xerox |

*Source: Gartner (October 2016)*

## Guideline 6: Build the Business Case for RPA

It is important to build an understanding of the required and available budget, as well as the financial constraints and opportunities that may be present. The current business process cost information should be used in several ways:

- To evaluate the need for, and to prioritize and justify RPA investments
- To halt or avoid planned expenditures on existing solutions so as not to incur costs with limited benefits
- As input to the eventual business case for avoided costs

The business case should look at the total cost to operate a process, the potential for excellent business outcomes to generate more revenue, and how that would impact the outcome of delivering the process in a new style.

The total cost of ownership (TCO) differs, depending on the pricing model of the provider and how the robots are licensed. The robot licensing and adoption options include:

- Annual robot licenses with or without a minimum commitment, which may need to be supplemented with an enterprise server license
    - Robot usage will determine how many enterprise server licenses are required. Prices range from $1,000 to $16,000 per robot. Certain providers have a minimum robot commitment, typically three years, over a period of time. The amount of work a robot can perform varies, but depending on the architecture, each robot can perform the work of between two and six full-time equivalent people.
- Perpetual licenses for robots, plus a server license for which the usage of the robots will determine how many server licenses are required, depending on the type of robot functionality
- Pay per transaction supported by a robot, as in, number of journals posted or customer calls taken
- Pay per savings achieved from the use of the tool, such as a percentage of the extra tariffs that are able to be collected or extra products and services that are able to be deployed
- Pay-for-SaaS robots, including use of the bot and supporting server infrastructure
- Pay for a business service, which may include RPA tools in the service

## Guideline 7: Communicate What RPA Means to Your Organization

Challenges of change, fears of job losses and media coverage bring potential resistance and can even sabotage automation plans. Approaches to improve the adoption of RPA by employees include:

- Explain your philosophy of automation with your EAR and how you will prioritize RPA and other automation tools by geography, division or business unit.
- Advertise internally for people who have an aptitude and desire to design robot scripts.
- Advertise internally for people to learn how to spot processes ripe for automation and link this to your Lean and Six Sigma training and teams.

- Emphasize that RPA is a step in automation activities, and it can remove elements of the mundane, repetitive tasks from some employees' roles, freeing them up for higher-value work.

For those desiring to commission and use RPA, they need to understand the types of processes that are suitable for RPA, the timescales, and the changes that do and do not need to be made to processes for efficient adoption. For example:

- One company tried to use RPA for a process that already had several good business process as a solution (BPaaS) suppliers.
- One company realized that rather than designing the RPA process to follow the human process, it should get the system to fill out a digitalized, structured form and that "formalization" cut out a series of steps that were pointless to write into a combination of optical character recognition (OCR) and RPA tools.
- Another company realized that it had made a mistake using RPA on a process that included a combination of unstructured and structured data, and the deployment failed.

### Guideline 8: Visualize the Cycle of a Robot Deployment

Typical deployment stages:

- Estimate the amount of work a robot can perform. The average capacity of a robot differs by project, as a robot process needs to be carefully defined. If it was previously defined by multiple people, it can be redesigned as a series of batch processes, and the robot can work 24 hours if the systems are live.
- Testing is critical to success and can be managed during preproduction to test if the robot produces the audit trail expected from a large set of trial data, but it must be carefully managed if the process changes. Note: Activities with very frequent process changes may not be suitable for RPA and the original test may not capture all of the potential process exceptions, seasonally related or otherwise.
- The time to production will vary by the type of activity that the robot is designed to perform. Major banks have taken a year to trial and test robot implementations where they are being used in important tasks. In less mission-critical tasks or processes, deployments can be within weeks if using a SaaS vendor or for basic processes.
- In production, depending on the process, robots can need continuous monitoring for continuity of the service or activity. Dashboards allow an organization to route work to both employees and an RPA or other automation tools and provide central visibility. For example, exceptions will need to go through a process that could be managed by an artificial intelligence and then handed to a person if the process still needed work.

## Evidence

Insights came from client conversations, client inquiries and internal discussions among Gartner colleagues.

## Note 1
## Actions to Build an Enterprise Automation Roadmap Incorporating RPA

- Build a team of business and IT people to act as a center of excellence for RPA deployments (see Guideline 4).
- Catalog all processes that are currently not touchless straight through processing, yet are fed by digitalized data. Catalog the scale, regularity and error rates of these processes. This forms the basis of an automation list of your processes, and a map of the possible ROI and time to result for using various automation approaches (see Guideline 5).
- Build standardized views of the processes from expert examples within your organization — either from other divisions or consultants — and then see what can be standardized before automation. However, if a process can be automated in a short time frame (that is, in less than three months) and produce high ROI, consider streamlining it first in RPA and then planning to do further standardization or moving it to a new approach. Some processes will not need this steppingstone approach and could be redesigned straight into APIs or applications, which cuts out the need for the RPA tool altogether. Some processes could be automated in three weeks and start to deliver benefits.
- Align RPA automation plans with future exploitation of ERP or other apps or artificial intelligences. If you know your ERP adoption plans include using more ERP functionality to automate a task/process, then don't consider this activity for RPA in the short term. If you fix the problem in an RPA tool, you may lose the momentum to add it into the EAR roadmap, leading to more systems than you actually need and a less than optimal long-term solution.
- Automation planning is neither static nor a one-time activity — plans will be developed at increasing levels of organization processes as you decide on best next-guideline scenarios. Additional factors, such as integration, master data management (MDM) and business process modeling/management, will also need to be factored in.

## Note 2
## Reasons RPA Is More Than a Screen Scraping Tool

- Screen scrapers only understand how to scrape data from a field in a fixed location and move that data to a field in another fixed location. If the field moves, the tool stops. Screen scrapers exist on individuals' desktops and are like individual macros, scripted by individuals. RPA is different as it can connect at the presentation layer to HTML, the client server, Java Access Bridge and

mainframe applications using existing application pathways. RPA can perform screen scraping if required and supports remote automation tools if carefully deployed.

- The processes, once designed, can be housed on a centralized server and run by multiple robots, which provide audit metrics every moment they are operating. RPA tools have a dashboard to show when the robot is working and exactly what it is doing.