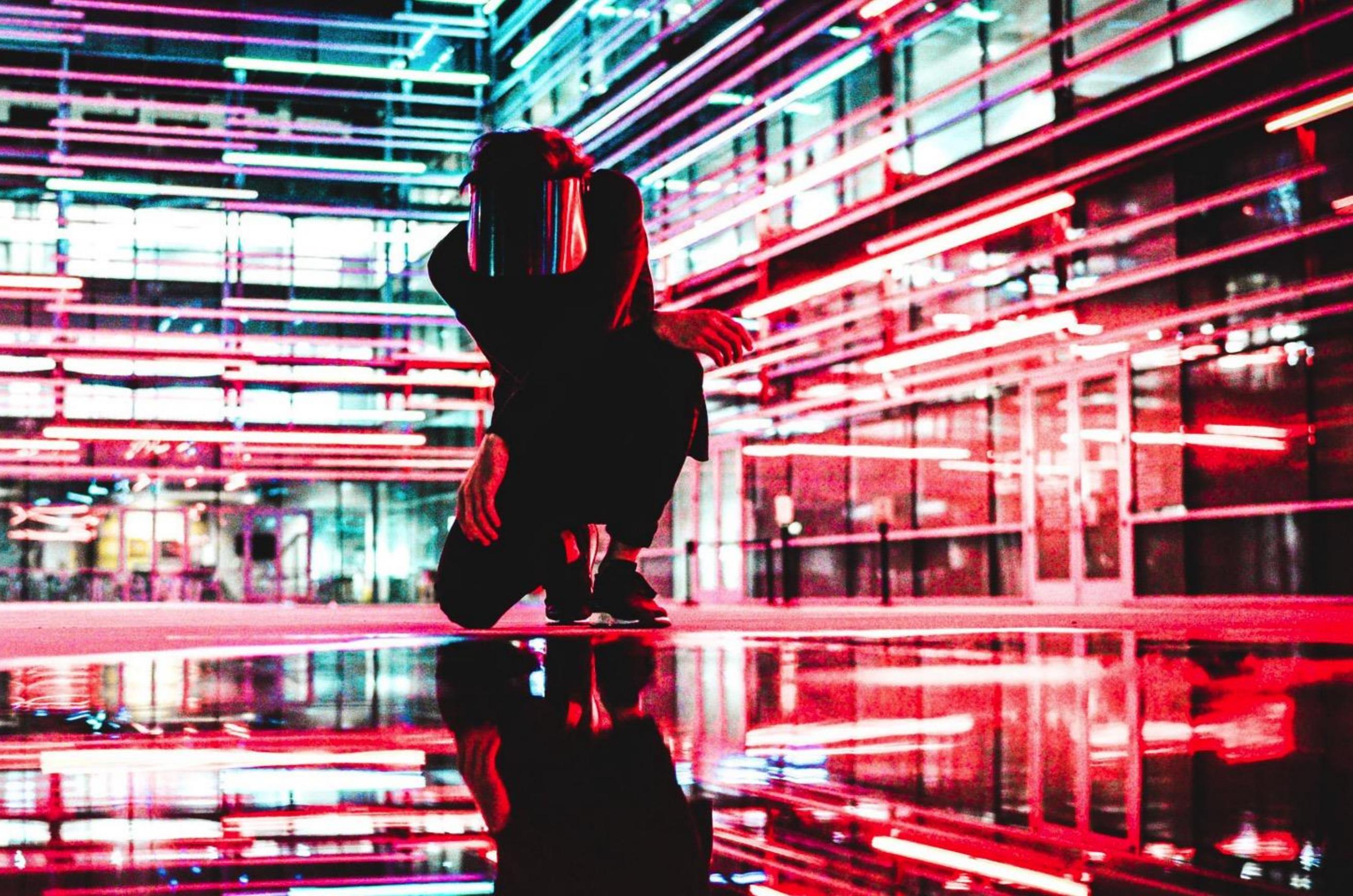


# Generali RPA Booklet

Insights and best  
Practices from  
Generali's RPA  
Journey



# **Generali RPA Booklet**

**Insights and Best  
Practices from  
Generali's  
RPA Journey**

*Published in June 2020 – Updated December 2021*

#### *Team of Authors*

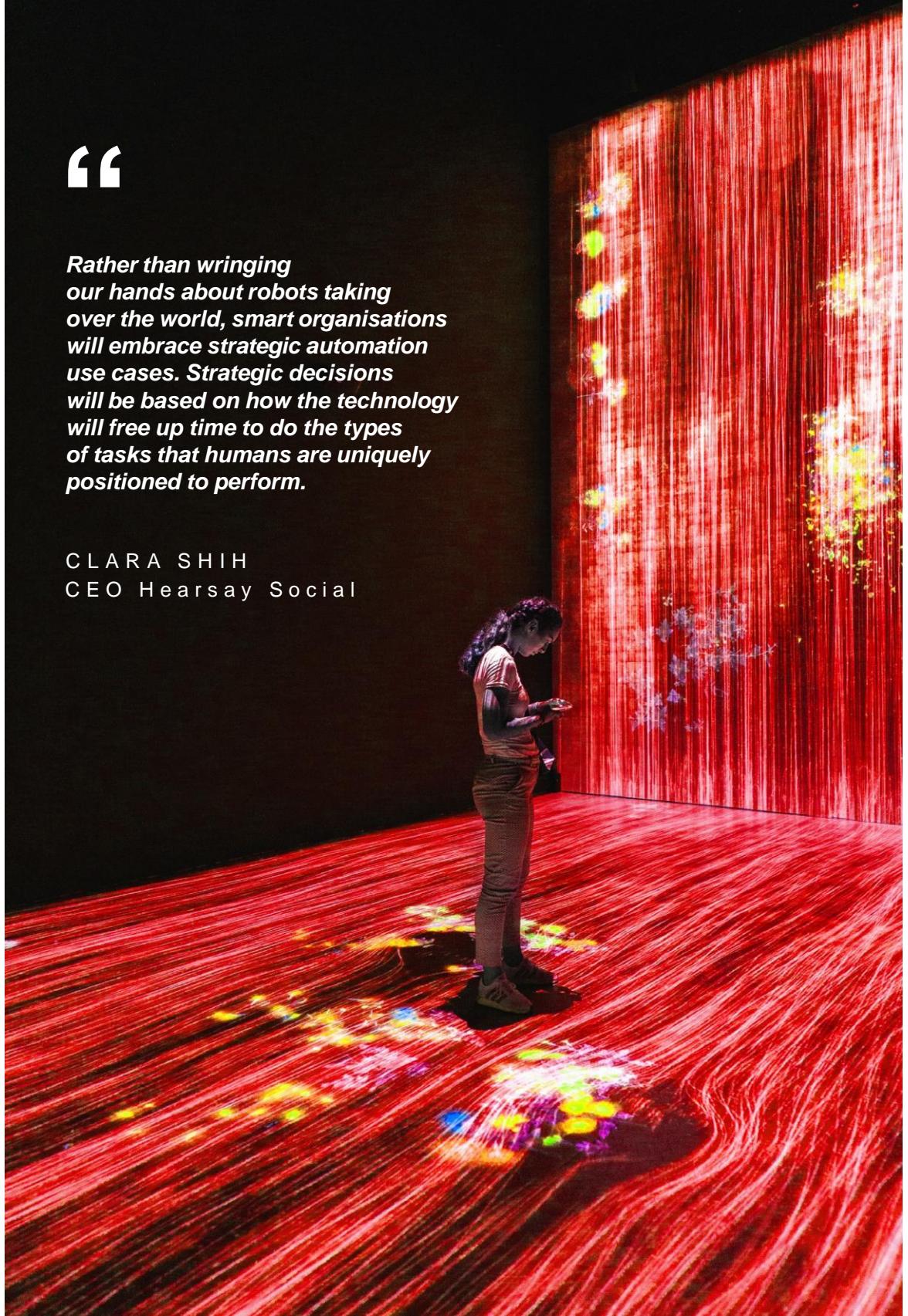
*This booklet's primary authors are Pierluigi Sanna and Cristina Pirola from Group Head Office and Milla Schönberg and Thomas Fischer from Generali Germany*

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“

**Rather than wringing  
our hands about robots taking  
over the world, smart organisations  
will embrace strategic automation  
use cases. Strategic decisions  
will be based on how the technology  
will free up time to do the types  
of tasks that humans are uniquely  
positioned to perform.**

CLARA SHIH  
CEO Hearsay Social



# Foreword

Dear Readers,

“Automation” is currently on everyone’s lips. New technologies are paving the way for replacing tasks that once relied on manual effort. Among these technologies is Robotic Process Automation (RPA), which marks the next level of automation, especially when combined with artificial intelligence (AI) opportunities.

RPA is software that operates similarly to human actions. From simple “clicks”, to “copy/paste”, “interpret input”, “change application” and more, the applications it can operate are extensive and its potential is massive.

The development of robot technology is rapid and requires minimal effort. That said, the expectations around it are high.

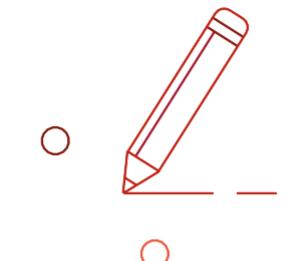
The Generali Group has already invested into exploring the incredible capacity of RPA. The experiences we’ve gained to date are outpaced only by the promise we see.

Clearly, RPA cannot solve every problem, but the leap to automating many more processes is within easier reach than ever. Improved efficiencies and quality will have a powerful and positive effect on our customers and stakeholders.

RPA is constantly evolving: this is one of the reasons why we have included “Smart Automation” as one of the five key digital enablers of the Generali Digital! Strategy.

This booklet provides an overview of robotics and its methodologies, while outlining some proposed processes and operating models. Inside, you’ll find extensive resources and valuable information.

Enjoy the reading.



# Introducing Generali Digital!

A bold Initiative to drive our Lifetime Partner Ambition



## INNOVATION

Innovation will provide the inspiration and methods to best exploit new business and technology opportunities



## CUSTOMER RELATIONSHIP MANAGEMENT

We will reinvent the customer journey: from **customer knowledge**, to touchpoints, from transparency to interactions



## SMART AUTOMATION

Process re-engineering and the adoption of new technologies will accelerate process automation



## DATA ANALYTICS & AI

Data, Analytics & AI will guide business decision-making and enhance our competitive advantage



## AGILE ORGANISATION

A lean, flexible and empowered organisation will enable us to move at a faster pace

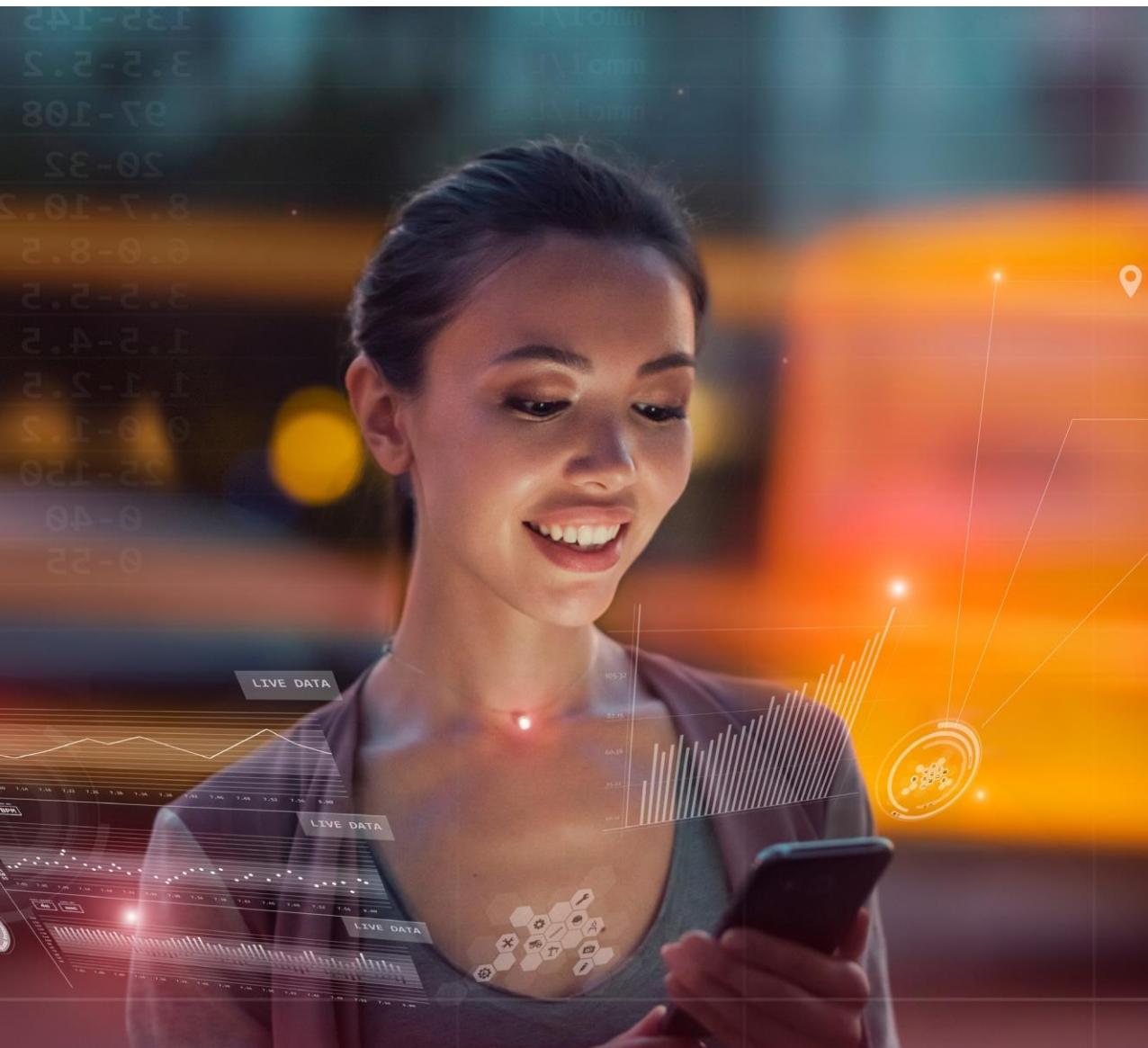


## THE PURPOSE OF GENERALI DIGITAL!

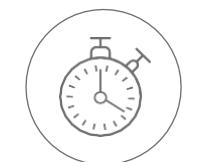
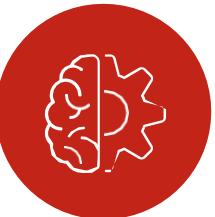
Deliver world-class experiences to customers, distributors and our people by transforming Generali into a truly innovation-led, digitally enabled, data-driven, and agile organisation

# Generali Group Digital Enabler

## Smart Automation



### DIGITAL ENABLERS



### DESCRIPTION

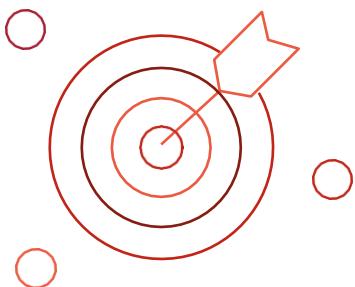
- Accelerate automation through process re-engineering methodologies and the adoption of new technologies
- Adopt automation as a strategy to facilitate digital transformation, core process modernisation and the activation of new services
- Deploy relevant group assets to accelerate local Programme Adoption and to identify the most relevant methodologies and promising technologies
- Harness the benefits of both RPA and AI while overcoming traditional barriers to digital transformation
- Achieve efficiency goals (i.e. evaluating the introduction of automation in customer, agent and employee services through bot assistants)
- Share best practices and knowledge

### SCOPE

- In 2020 Generali created the **Smart Automation Centre of Excellence** (SA CoE), enabling the evolution from Robotic to Smart Automation
- Its goal is to **promote Smart Automation adoption** and initiatives, reducing time-to-market and maximizing business impact through convergence, increased collaboration and innovation
- **Smart Automation** combines Artificial Intelligence (AI) with traditional automation technologies to make processes faster and more efficient.
- Among all these technologies, **Robotic Process Automation** represents a forerunner to improve operational efficiency and achieve our Lifetime Partner ambition.
- This **RPA Booklet** is focused to collect insights a best practices from all the Group about Robotics and represents the approach the Group follows to analyze every SA technology

# Overview

RPA is one of the technologies that play an important role in Generali Digital Strategy and in the three-year Strategic Plan.

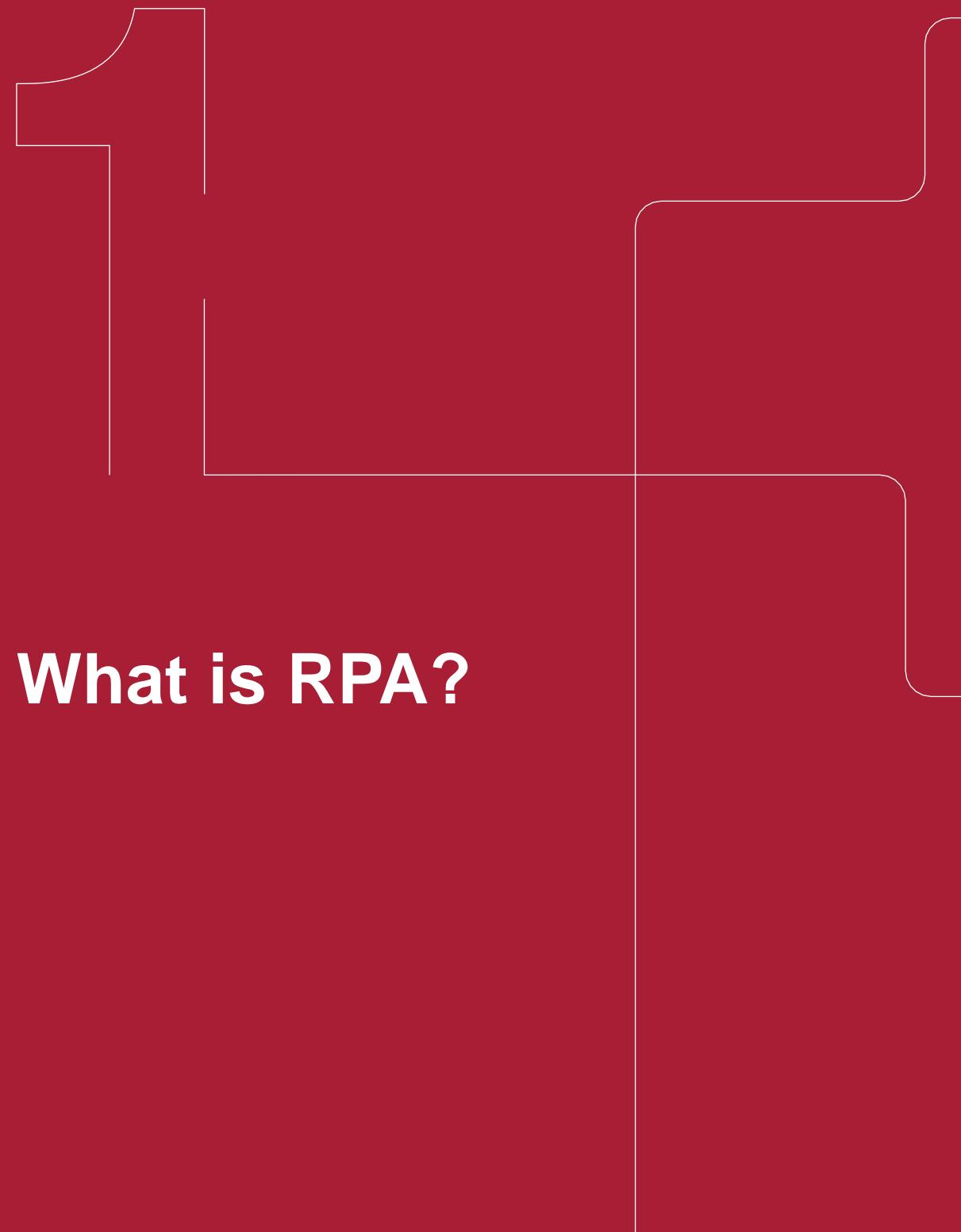


Generali RPA Booklet

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- 1 What is RPA?
- 2 RPA for Generali
- 3 Robotic Operating Model
- 4 How to set up an RPA Programme
- 5 RPA on Field
- 6 RPA Democratisation
- 7 RPA Use Cases
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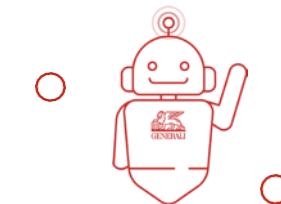
# What is RPA?



## THE “AUTOMATION FIRST” ERA

# The “Automation First” Era

Technology supporting automation isn't new, but how they're being **combined to drive the integration of RPA and other technology levers with AI** is what is defining the Automation First Era.



**The Automation First Era is here thanks to improved process mapping, the advent of computer vision and rapid growth of AI.**

### BUSINESS PROCESS OPTIMISATION

Businesses acquired greater **insights** due to the Business Process Optimisation (BPO) movement. To outsource, businesses mapped out **workflows and tasks**, often for the first time.

### BIG DATA

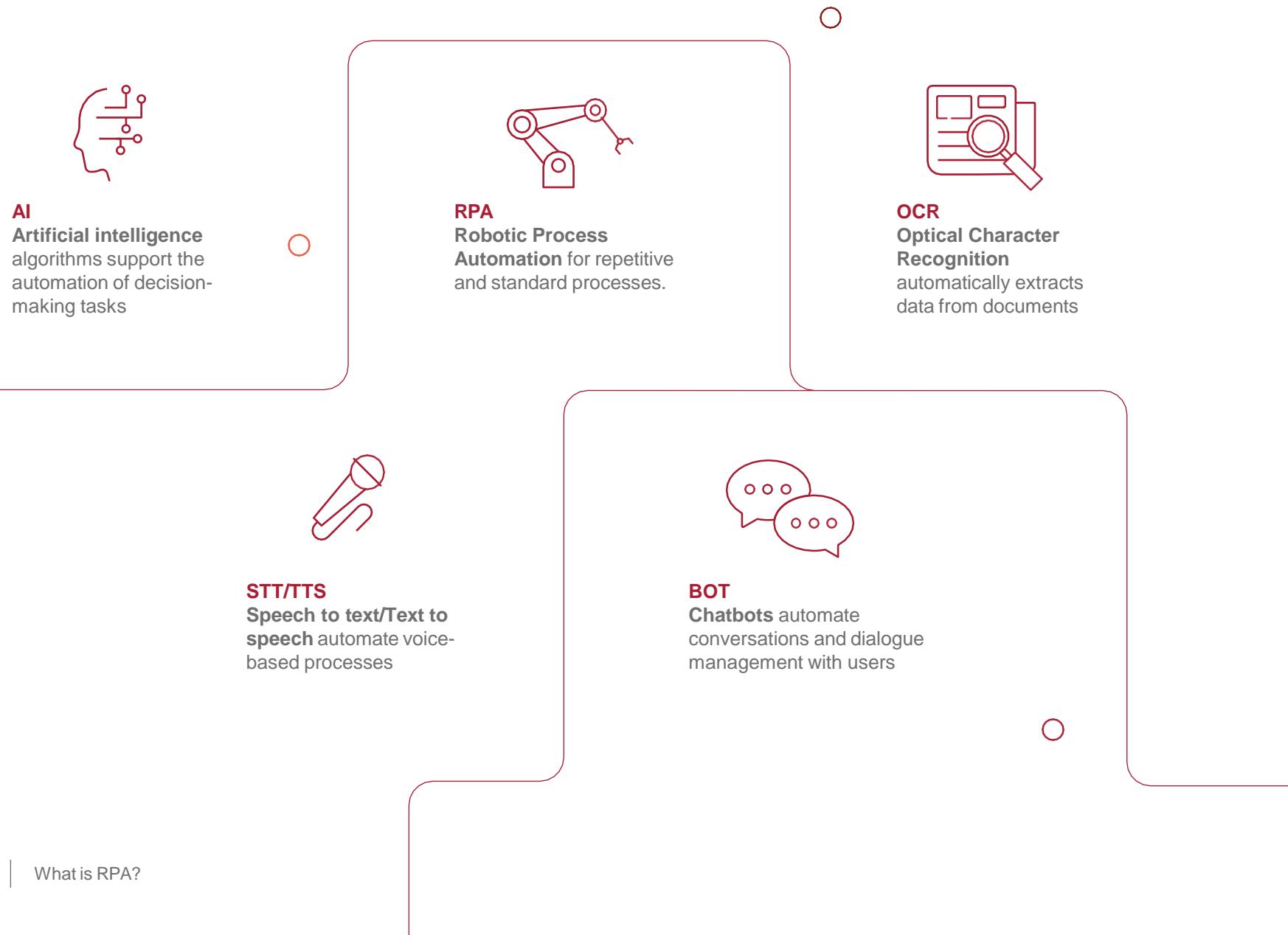
Vast amounts of data are now available for processing thanks to **technological innovations** (e.g. low-cost cloud at scale, the explosion of big data). This has led to an AI Renaissance that is pushing the boundaries of process automation.

### COMPUTER VISION

Computer vision-improved capabilities have **enabled process automation platforms** to read the screen and interact with UI elements.

# Main enabling Technologies of the “Automation First” Era

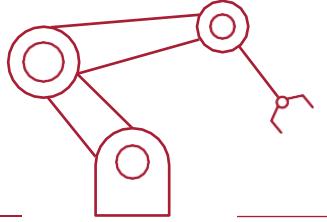
Innovative technologies enable new automations, which can be harnessed to maximum benefit when combined together



What is RPA?

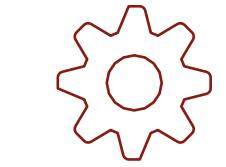


# What is RPA and what is it for?



## Robotic Process Automation (RPA)

RPA is software that interacts with other software. It mimics human rule-based actions or sequences of actions



## INTERACTS WITH USER INTERFACE

RPA robots utilise the User Interface (UI) to capture data and manipulate applications like humans do. Ordinarily no changes have to be made to existing systems.



## OPERATES ON MULTIPLE IT SYSTEMS

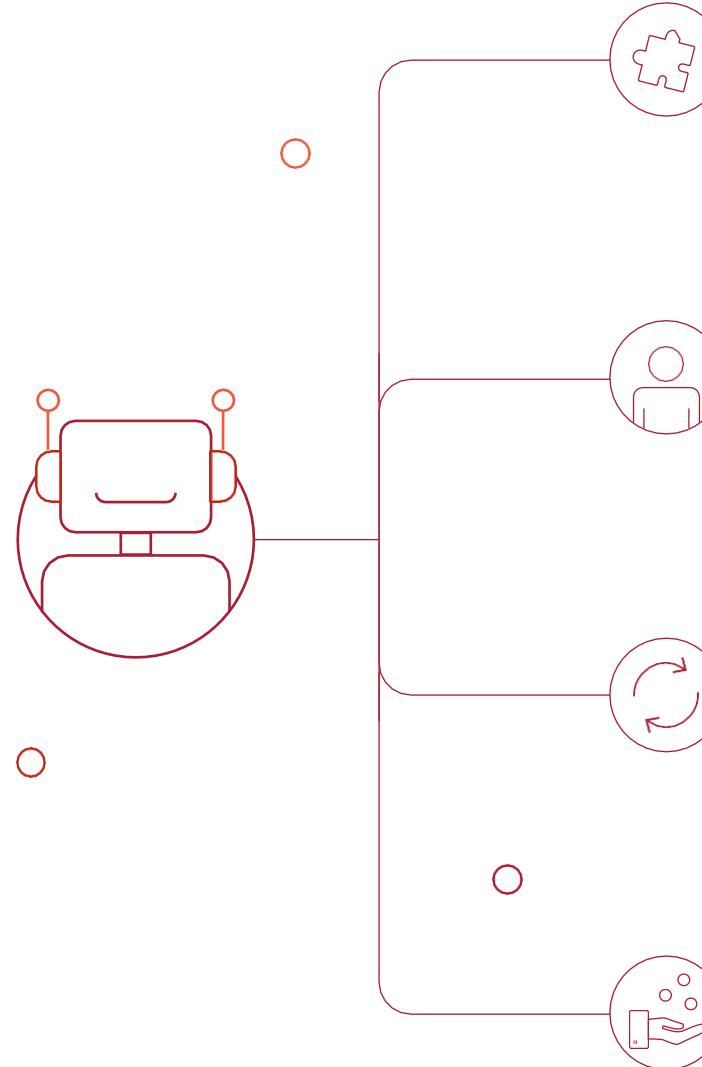
RPA software, called 'robot' or 'bot', operates on IT applications. It is able to execute processes in order to conduct transactional activities, data manipulation and communicate with other IT systems.



## DETERMINISTIC

RPA bots don't learn from past actions. They are rule-based robots, configured according specific algorithms, so that each action has a specific and predetermined outcome.

# Objectives of RPA



## CROSS-PLATFORM INTERACTION

In addition to utilizing UI to capture data and manipulate applications, RPA robots interpret, trigger responses, and communicate with other systems to perform a vast variety of repetitive tasks.

## HUMAN OPERATIONAL SUPPORT

RPA configures software that will automate the activities or tasks previously performed by humans, who then make judgment calls, handle exceptions and provide oversight.

## VIRTUAL WORKFORCE CREATION

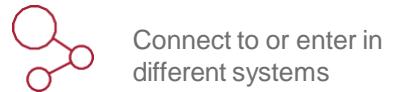
RPA aims to replace repetitive tasks performed by humans with a virtual workforce.

## QUALITY INCREASE AND COST REDUCTION

RPA uses a robot to run application software exactly as a human would, however a robot never sleeps, makes zero mistakes and is usually low-cost.

# What RPA can and cannot do

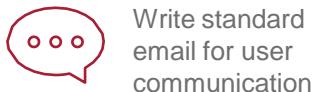
## ROBOTIC SKILLS: WHAT RPA CAN DO



Connect to or enter in different systems



Monitor and control activities



Write standard email for user communication



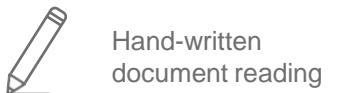
Data elaboration in order to execute rule-based calculations



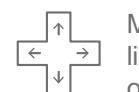
Manage, stock and organise data



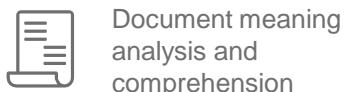
Gather, process and analyse structured information



Hand-written document reading



Mechanical actions like moving objects or walking



Document meaning analysis and comprehension

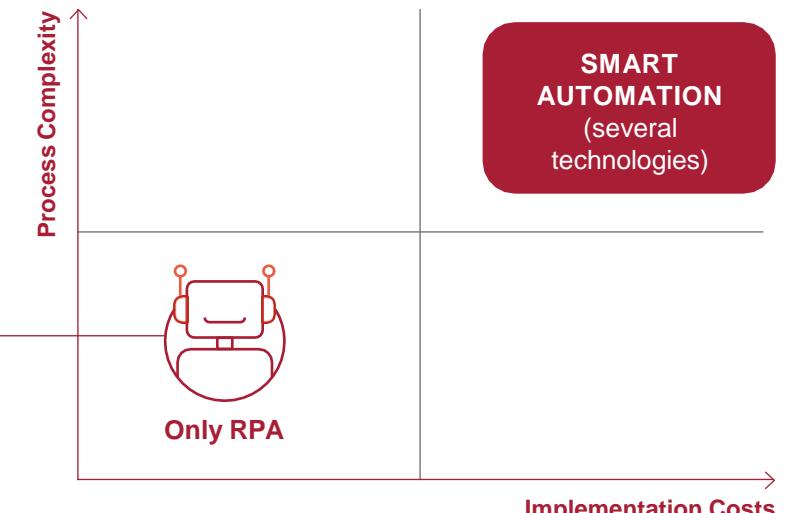


Environment variations or changes identification

# Where RPA is suitable

RPA technology is typically applied to **task automation**.

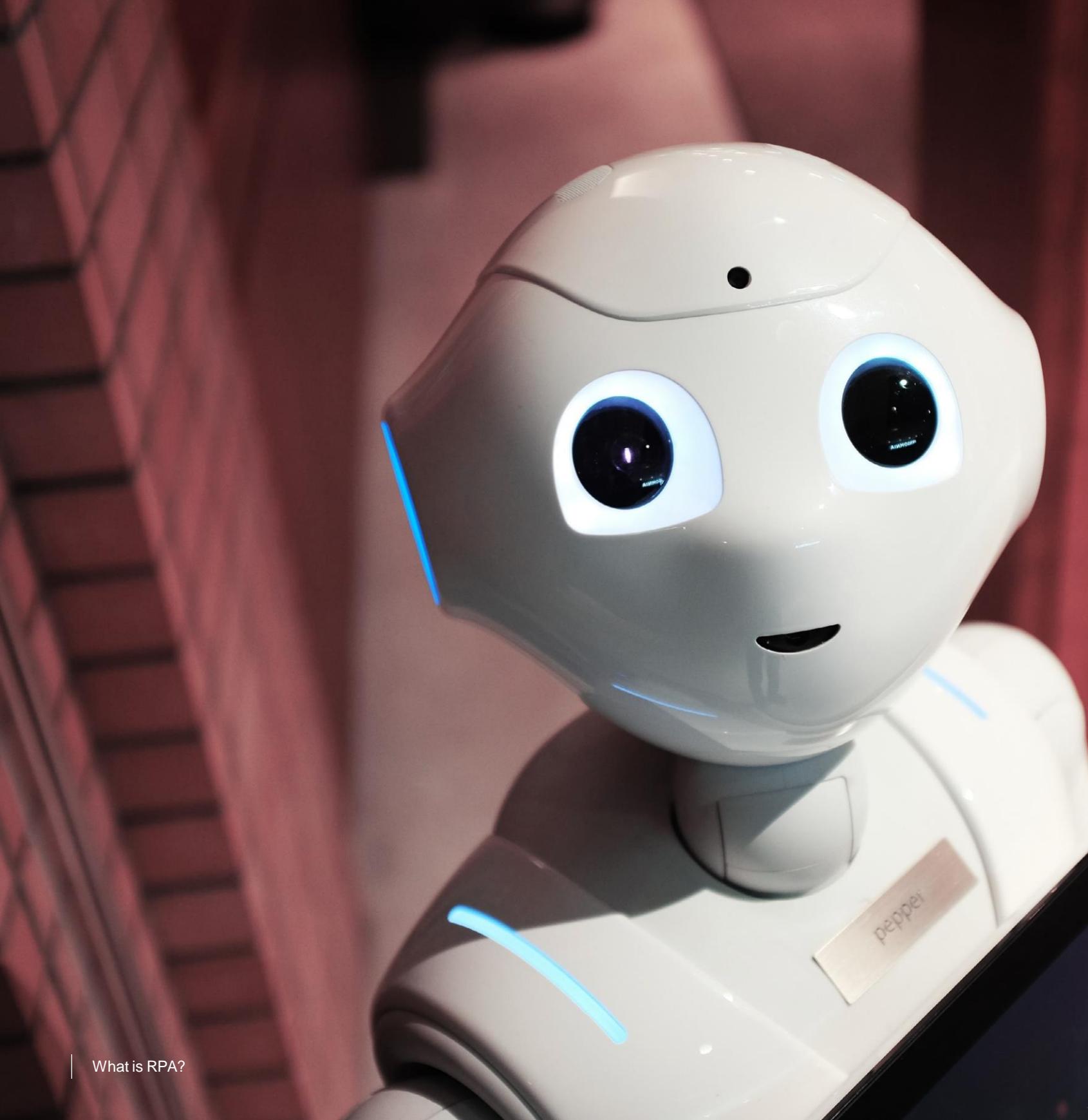
- Highly manual and repetitive tasks
- Rule-based processes
- Low exception rate
- High volumes
- Mature and stable processes
- Processes with standard readable electronic input type / structured input



## WARNING

**It is strongly recommended to avoid automating**

- Processes that will be changed in the short term
- Processes based on non-stable applications or that are subject to change in short time

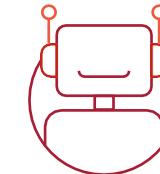


## ROBOTIC PROCESS AUTOMATION

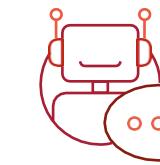
# What is a «Robot» today?

Robotics can be applied with different technologies in a huge variety of contexts. Consequently, **different types of robots can be identified**. But what is a robot?

## RPA ROBOT



**Robot or Bot** - Robotic process automation **software** that can be easily programmed to do **basic tasks across** applications similar to human workers. RPA software is designed to reduce the burden of repetitive, simple tasks on employees. Typically, robots do transactional activities, data manipulation and communicate with other IT systems. Ordinarily no changes have to be made to existing systems.



## AI ROBOT

**Chatbot** - An artificial intelligence (AI) programme that **simulates interactive human conversation** by using key pre-calculated user phrases and auditory or text-based signals. A **chatbot** is also known as an artificial conversational entity (ACE), chat robot, talk bot, chatterbot or chatterbox. These cognitive assistants are sometime used as voicebots, equipped with speech skills.

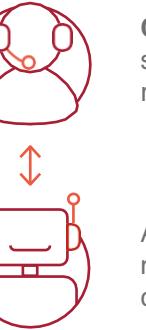


Robo advisors are typically used in the financial service industry as financial advisors and provide online financial advice or investment management with moderate to minimal human intervention. This advice is based on mathematical rules or algorithms, which are executed by software and therefore do not require a human advisor. The software automatically allocates, manages and optimises clients' assets or supports experts' activities.

# Types of RPA Bots

## ATTENDED ROBOT

- Automation triggered by humans**
- Attended robot performs activities that interact with human operations
  - Provides guidance and assistance, and is under direct user control
  - Attended bot runs on a desktop



**Call centre operators** need to quickly switch between different applications to retrieve customer data.

An attended bot could retrieve all necessary **data in real time** and reduce customer waiting time.

## UNATTENDED ROBOT

- Automation independent from humans**
- Unattended robot runtime executes RPA workflows for back office activities
  - It is managed by a central process automation system - the Orchestrator
  - It runs on a virtual desktop, in a secure session, end-to-end



**Backoffice operators** need to process huge volumes of data that require gathering, sorting and analysing.

An unattended robot could run 24h a day pre-processing all data and producing reports to support analysis activities.

# RPA Benefits for Process Optimisation and Customer Experience



## RAPID ROI

Average of 6-9 months, instead of years, due to speed of automation.



## PROCESSES ENHANCEMENT

From a quality, compliance, security and continuity point of view. RPA expedites processes, leading to an increase in throughput and a boost in overall productivity.



## BETTER CUSTOMER EXPERIENCE

High repeatability and zero fatigue boosts service quality up to a 100% accuracy rate, promotes rapid delivery times, and a reduction of up to 90% in cycle times.



## REPETITIVE WORK ELIMINATION

Reduces headcount. Virtual FTEs assume responsibility for repetitive, non-value-added tasks commonly performed by humans, while humans act as virtual workforce managers, monitoring robots and handling exceptions.



## IMPROVED SERVICE DELIVERY

RPA boosts the quality of services delivered by minimising manual intervention, errors and work duplication while rapidly decreasing processing times and driving increased capacity.



## ENHANCED ABILITY TO MANAGE

RPA advances improved governance and compliance (requirements are embedded in automation rules) through superior processes and data security, as well as enhanced disaster recovery (remote server control over the robots).



## COST REDUCTION

Because an RPA robot costs a fraction of an FTE and can work 24/7/365, which translates into a cost reduction of 35-65% for onshore process operations and 10-30% in offshore delivery.



## NON-INVASIVE TECHNOLOGY

RPA doesn't require any major IT architecture changes or deep integration with the underlying systems. It offers a reliable, yet fast and cost-efficient way for a "lightweight" integration into processes and IT assets.



## INCREASED COMPLIANCE

Through rule-based automation, which can enforce compliance requirements and maintain audit trails 100% of the time. All robot activities are monitored. The user has the full control to operate in accordance with existing regulations and standards.



## SCALABILITY AND FLEXIBILITY

Once a robot is trained, additional robots can be deployed quickly for minimal or no extra cost. Scaling robots up or down due to volume fluctuations is nearly instantaneous.



## INSIGHTS AND ANALYTICS

All activities performed by robots can be logged and interpreted through customised reporting tools. These provide visual dashboards that can be adapted for each operational requirement.



## MARKET TRENDS AND ADOPTION

# Key Enablers for a successful Implementation

IMPLEMENTING  
RPA ENTAILS  
THE CONSIDERATION  
OF KEY ENABLERS

#### CULTURAL ADOPTION

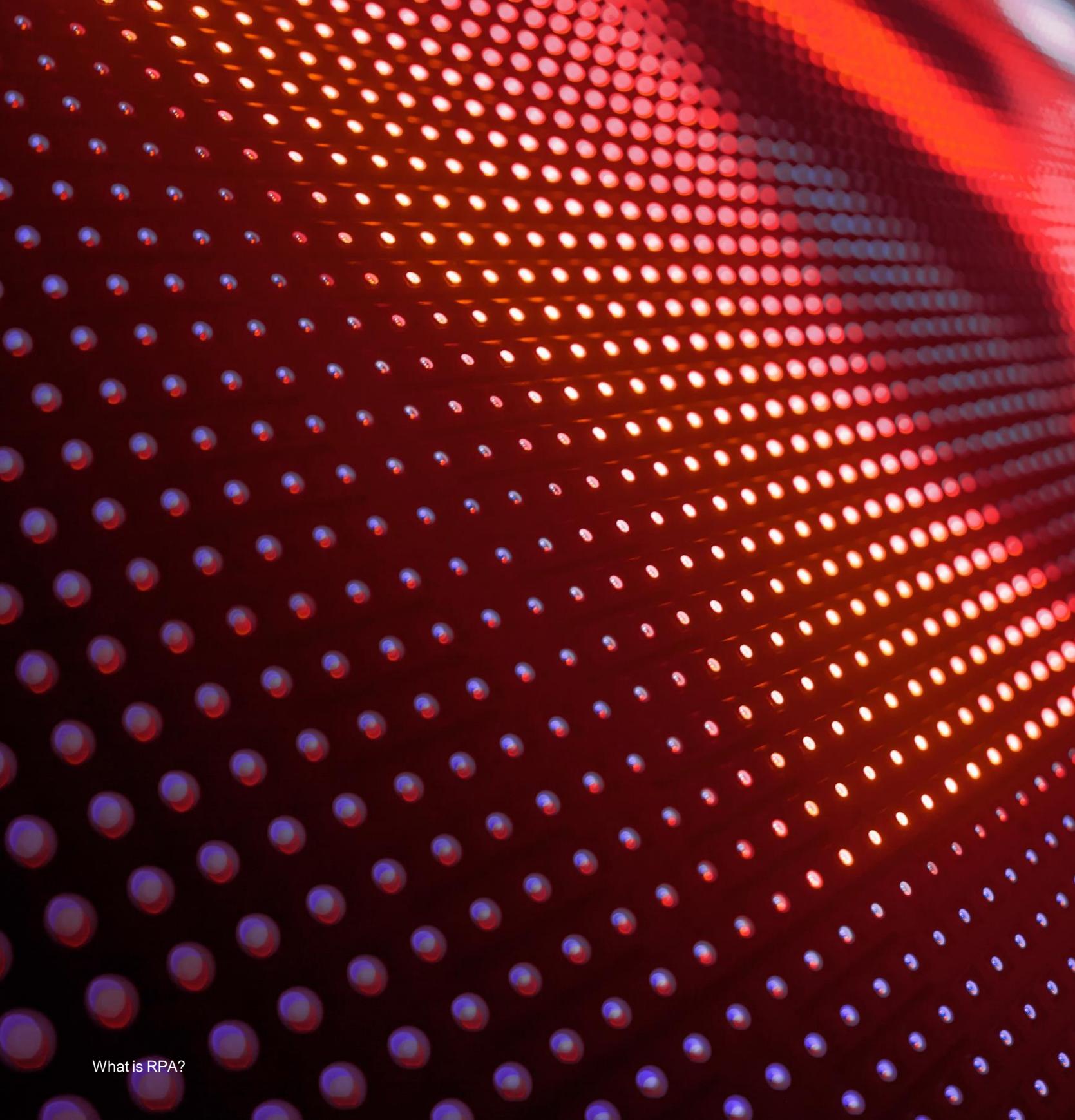
- Active executive-level RPA sponsor
- Strong and operationally efficient Robotic Operating Model
- Dedicated Change Management teams

#### IT ENGAGEMENT

- Onboard IT function **early on** to convey strong governance
- IT will **ensure requirements** for security, scalability, auditability, business recovery and change management **are properly met**

#### IN-HOUSE RPA CAPABILITY

- RPA is a **strategic capability**
- RPA aims to **evolve, leverage scale and increase business value time.**



What is RPA?

RPA APPLICATION TO THE INSURANCE INDUSTRY

# Focus on the Insurance Value Chain

To take full advantage of **RPA adoption** a top-down approach should be applied starting with the Insurance Value Chain's **automation potential**.



Product Development,  
Pricing & Underwriting



Sales  
& Marketing



Policy Admin  
& Services



Claims  
Management



Value-added  
Services



Support  
Functions

The Value Chain areas with the highest automation potential are **Underwriting** (Policy Admin & Services), **Claims** and **Support functions**. Within these, the **activities** that come with a **high automation potential** include:

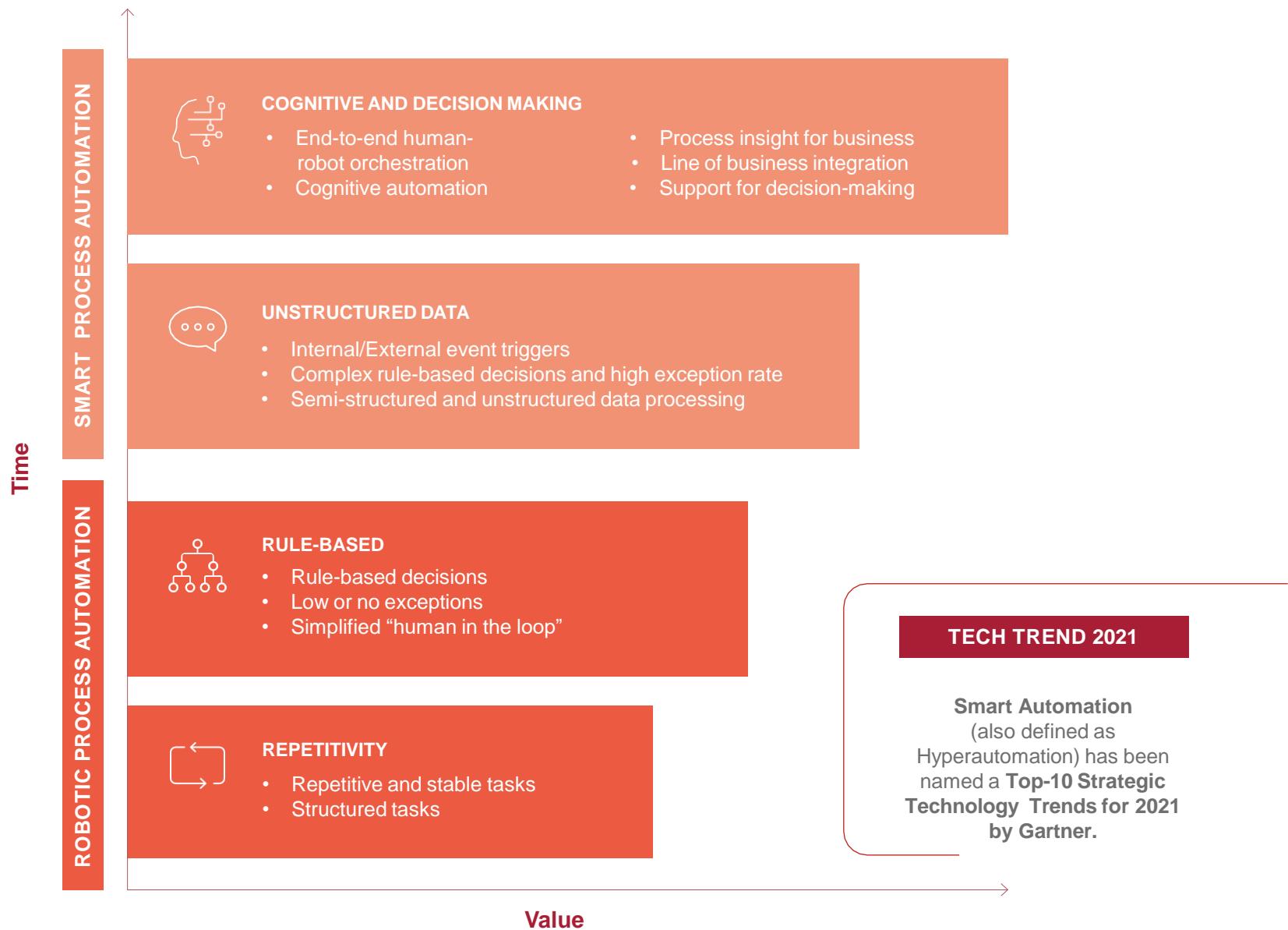
- **Underwriting:** Application Intake, Risk Data Aggregation, Risk/ Suitability Assessment, Policy/ID Issuance, Renewal Underwriting, Group Benefit Setup
- **Claims:** Claims Intake (FNOL), Triage and Allocation, Claims Adjustments, Claims Payment, Fraud Management, Subrogation
- **Support functions:** Finance and Accounting, Product and Service Development, Legal, IT, HR, Procure-to-Pay

## Legend:

- High automation potential
- Medium automation potential

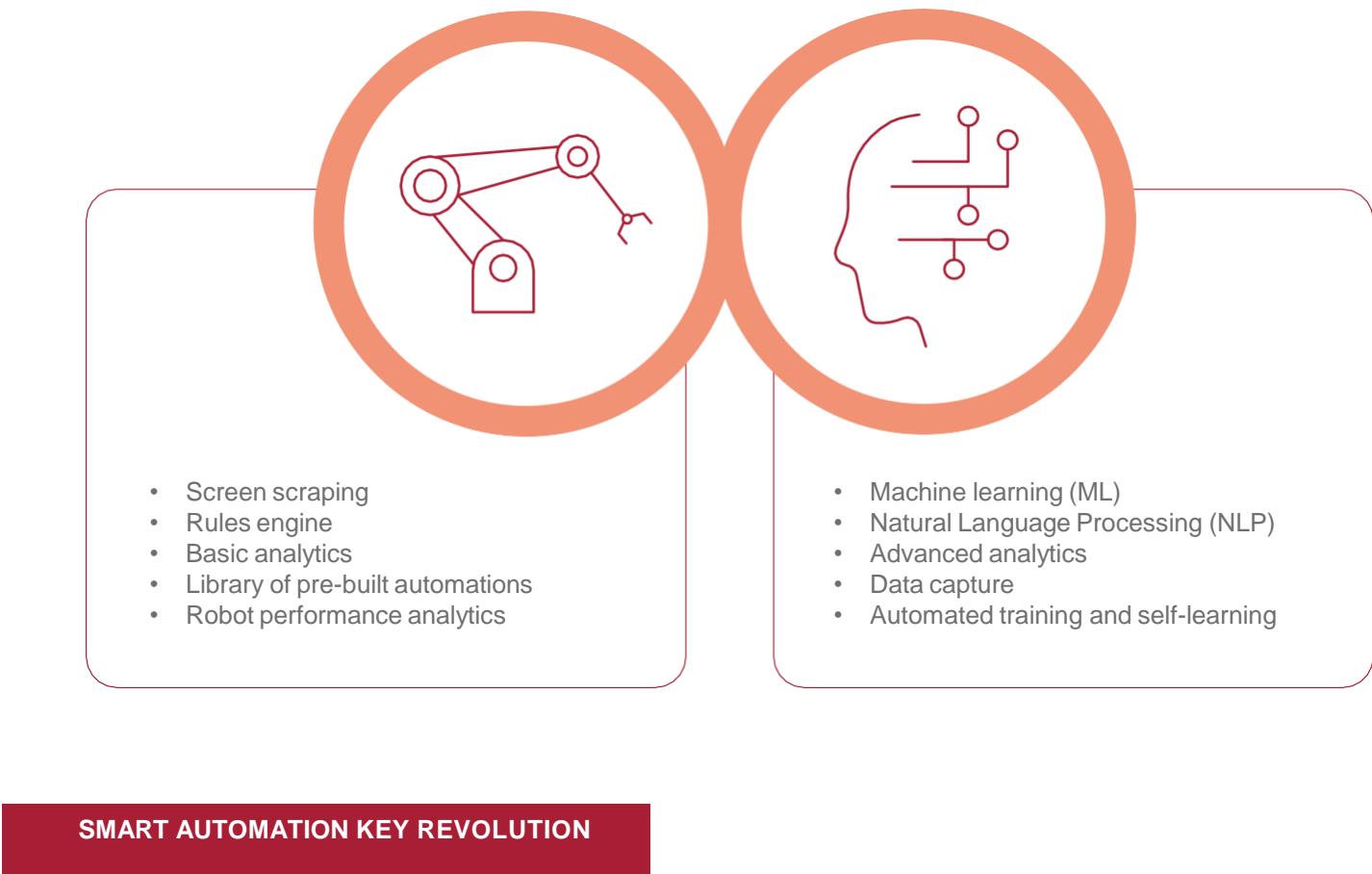
# The Path towards Smart Automation

Business processes are complex, involving highly heterogeneous tasks, making automation challenges harder.



# From RPA to Smart Automation

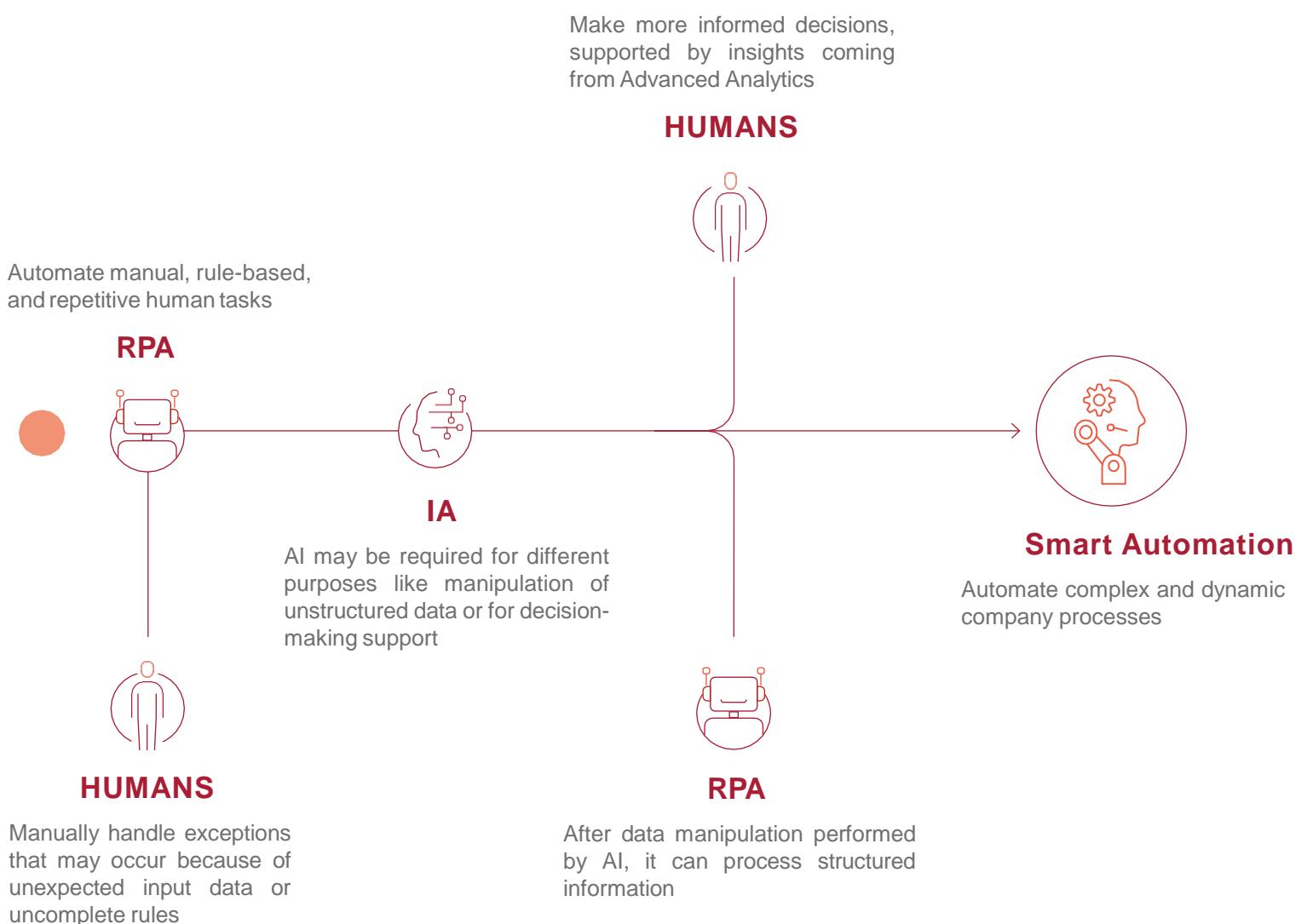
**RPA and AI** solutions augment each other to form a **Smart Automation** solution that goes beyond the automation of rule-based processes to support decision-making and empower the human workforce.



What is RPA?

# The Path towards Smart Automation

Smart Automation encompasses multiple players and technologies that interact to optimise automation.



# Predictions about RPA, AI and Smart Automation

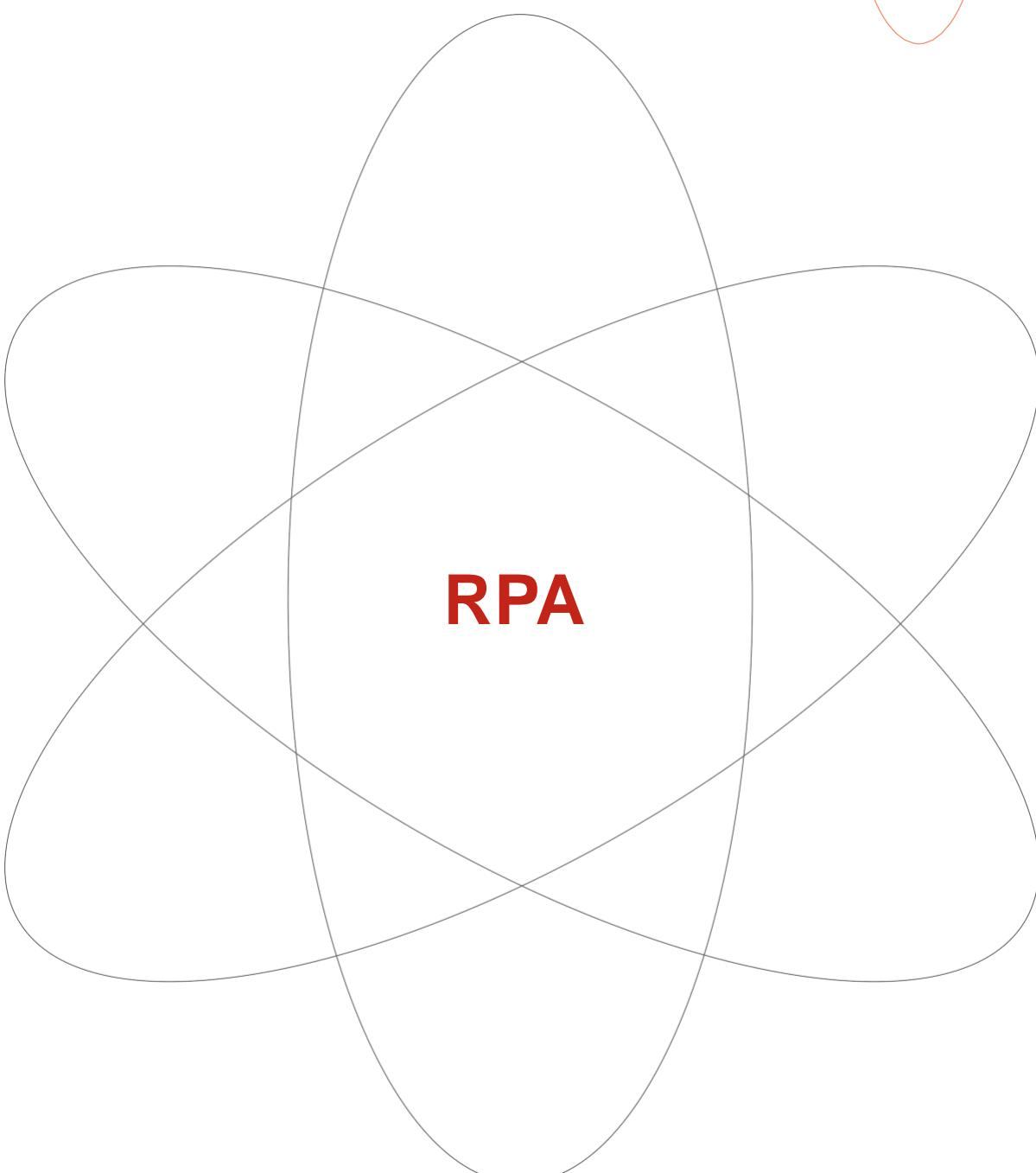
Process automation trends involve the **maturity of automation deployments** and the combination of heterogenous technologies to create **Smart Automation solutions**. These are aimed at automating increasingly complex processes.

***"More than a quarter of potential tasks suitable for automation will have been automated by an RPA tool by 2024, up from a mere 2% in 2016."***

Gartner, Forecast Analysis: Robotic Process Automation, Worldwide, Fabrizio Biscotti, Cathy Tornbohm, et al., 2 September 2020

***"Through 2024, large organizations will triple the capacity of their existing RPA portfolios."***

Gartner, Forecast Analysis: Robotic Process Automation, Worldwide, Fabrizio Biscotti, Cathy Tornbohm, et al., 2 September 2020



**RPA**

***"By 2024, more than 70% of large global enterprises will have more than 70 concurrent hyperautomation initiatives either mandating governance or facing significant instability."***

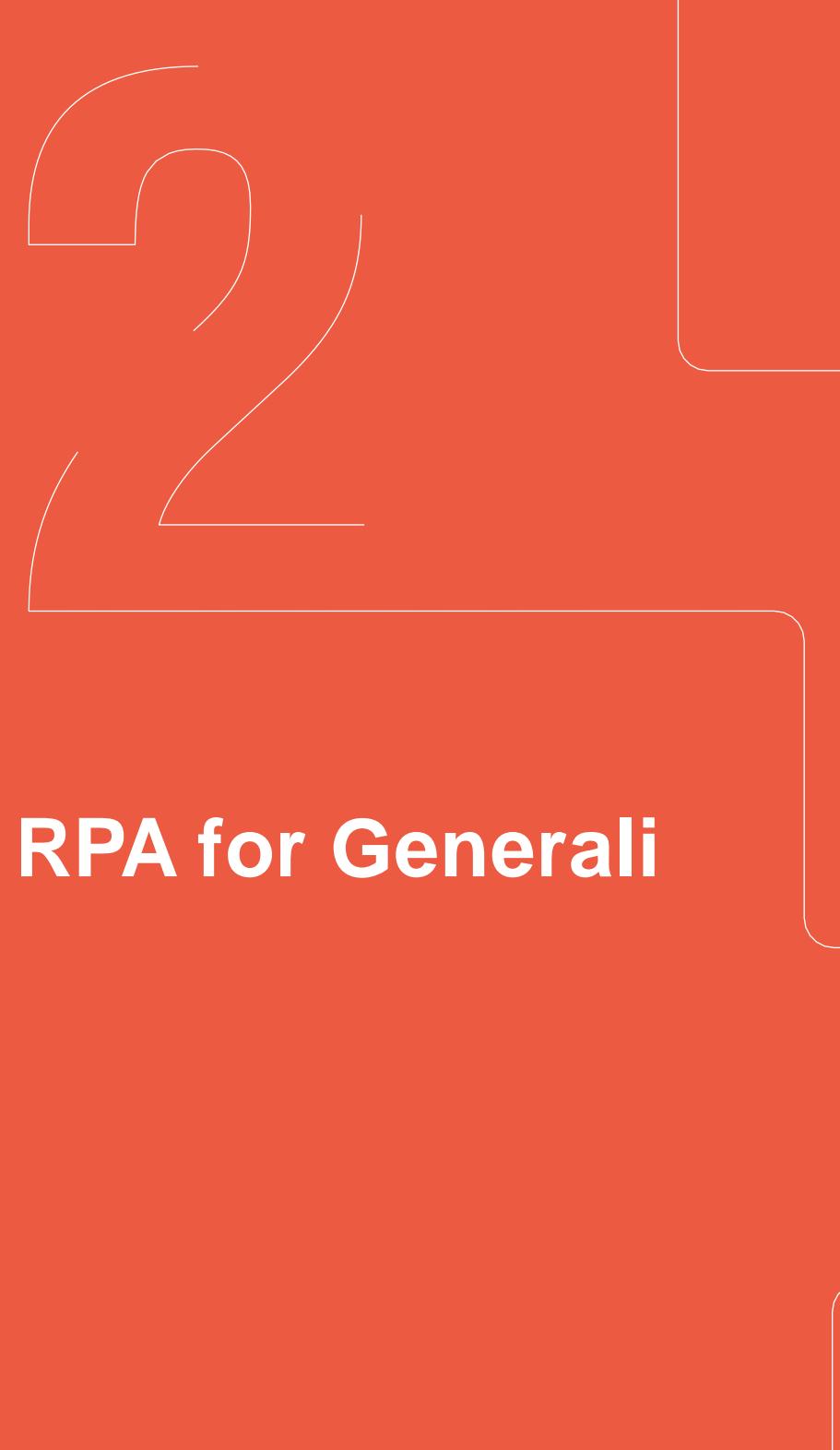
Gartner, Tech Providers 2025: Future Scenarios for RPA in the New World of Hyperautomation, Cathy Tornbohm, 19 May 2021

***"By 2025 the market for software that enables hyperautomation will reach nearly \$860 billion, with a CAGR of 12.3%."***

Gartner, Forecast Analysis: Hyperautomation Enablement Software, Worldwide, Fabrizio Biscotti, Cathy Tornbohm, et al., 22 March 2021

***"The RPA software market is expected to grow to over \$3.0 billion by 2024."***

Gartner, Forecast Analysis: Robotic Process Automation, Worldwide, Fabrizio Biscotti, Cathy Tornbohm, et al., 2 September 2020



## RPA for Generali

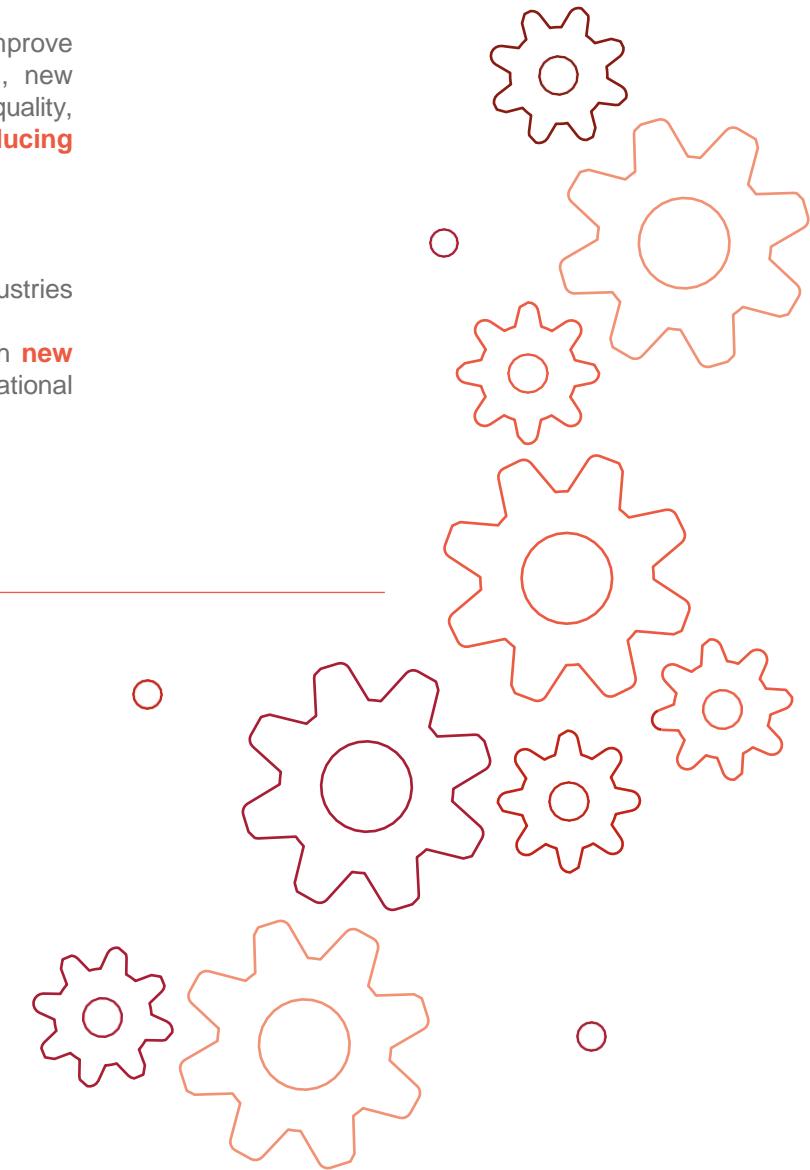
RPA FOR GENERALI

# What is an Operational Efficiency Framework?

An **Operational Efficiency Framework** aims to improve process and increase **business outputs** (e.g. revenues, new customers, market differentiation, production, innovation, quality, speed and agility, complexity or opportunities) while **reducing costs and minimising time/effort invested**.

Traditional operational strategies applied across different industries have reached their peak. To secure market share, businesses now have to establish **new disruptive operational strategies** to drive greater operational efficiency and lower operational costs.

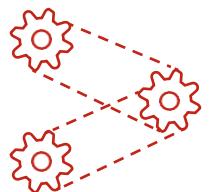
New disruptive technologies, like Robotic Process Automation, require a redesign of traditional Operational Efficiency strategies.



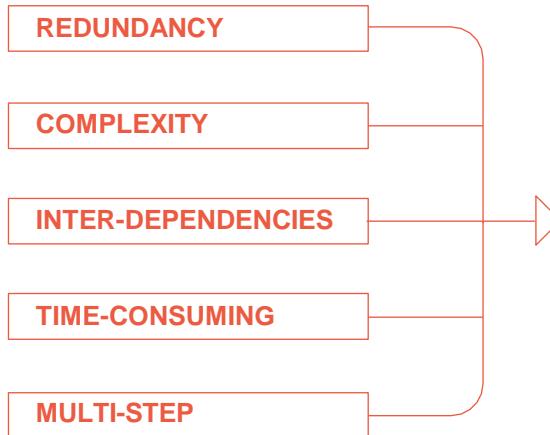
# Automation of Business Process for Operational Efficiency Scale-up

## RPA FOR OPERATIONAL EFFICIENCY SCALE-UP

- RPA has the capacity to work harmoniously within a company's existing framework
- It can seamlessly accommodate more data and more tasks without compromising output
- Businesses can rely on the flexibility of RPA to scale and accommodate their needs



## COMMON FEATURES OF BUSINESS PROCESSES



## INSIGHTS FOR LONG-TERM OPERATIONAL STRATEGY

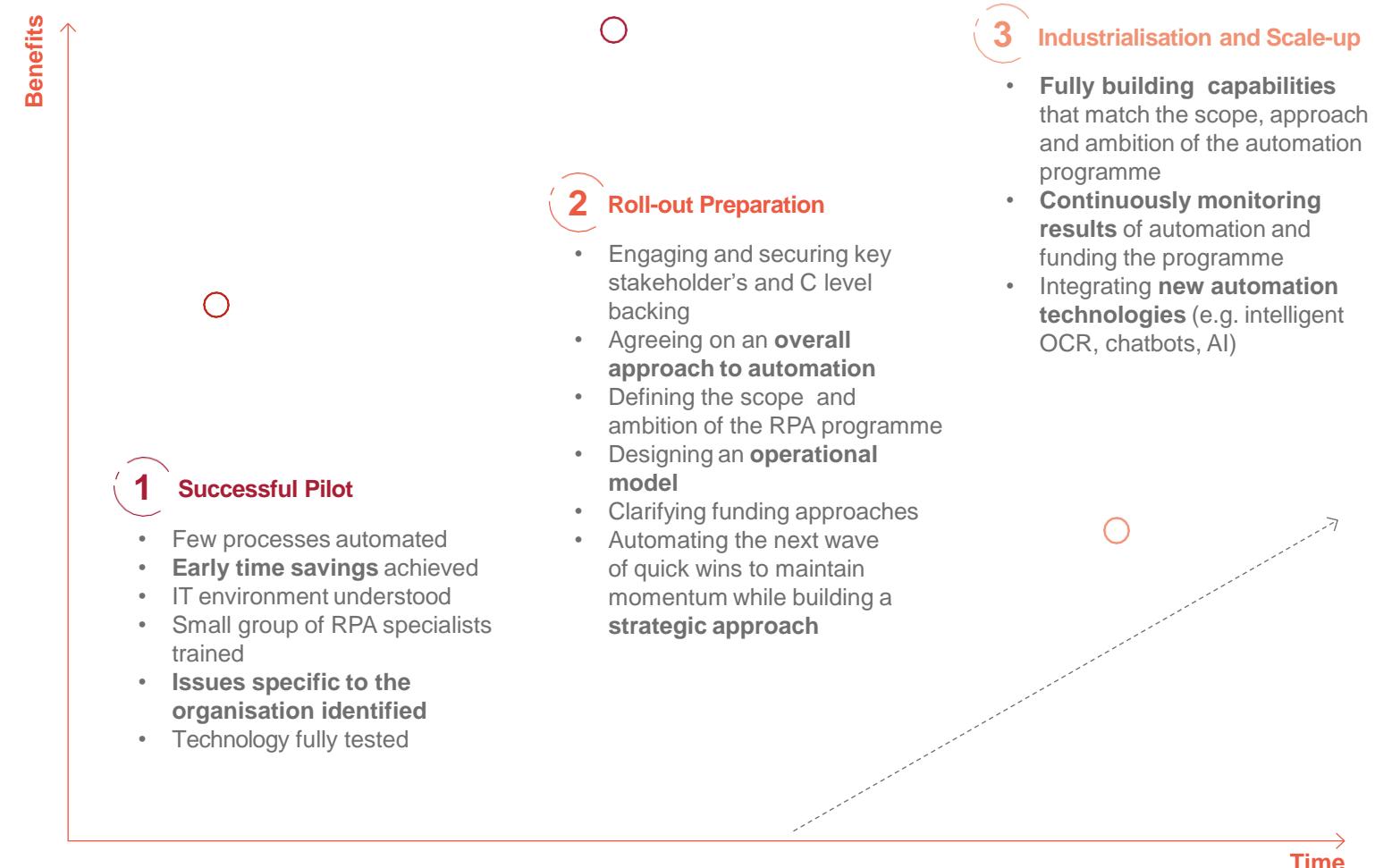
- The most transformative benefits come from the right combination of automation tools, process engineering and human talent
- RPA should be part of a process transformation strategy focused on long-term benefits
- Pursuing only short-term cost reductions will not provide the full benefits of automation

**Automation and optimisation of such complex business processes require a long-term operational strategy.**

**The operational efficiency framework will act as a template for its implementation.**

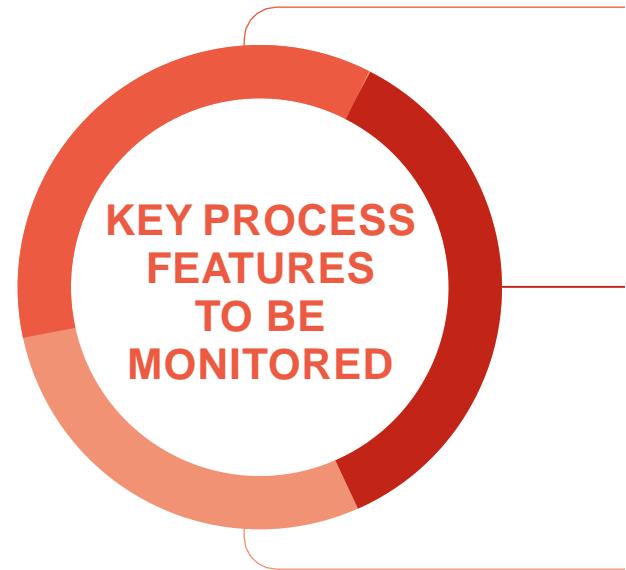
# RPA Programme Scale-up

Successfully automating a **pilot process** is an important result but it is **just the beginning of the RPA Journey**. To efficiently scale-up and enjoy the long-term benefits of automation it is necessary to undergo two further steps:



# Process Reengineering

Regarding automation, there are key features that should be monitored with suitable methodologies (e.g. Lean Six Sigma) and technologies (e.g. Process Mining or Intelligent BPM).



## BOTTLENECK

In the entire value chain, the bottleneck process is **primed for automation** because the throughput of the bottleneck process determines the efficiency of the overall value chain

## STABILITY

A stable process with **low variations** is preferred as the designed **logic for automation won't substantially change** nor will frequent re-works be required

## ROBUSTNESS

A robust process is characterised by a **few clearly identified exceptions**. Determining and managing all possible cases means automation can be well designed





## Robotic Operating Model

ROBOTIC OPERATING MODEL

# Robotic Operating Model

The Robotic Operating Model defines **how to implement RPA** within the organisation.

To implement a successful RPA programme, a **Robotic Operating Model** defines the organisational structure, roles, responsibilities, processes and metrics.



Covers the actions like people, processes, and technologies used to ensure that robots are dispersed throughout the organisation, appropriately defined, used and maintained.



Defines rules, policies, procedures, roles and responsibilities needed to properly execute an RPA journey and maintain it efficiently.



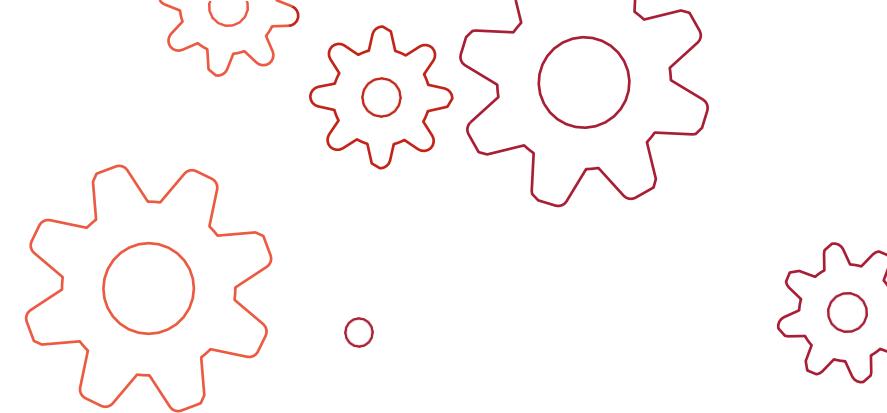
The Operating Processes support RPA implementation and metrics definition, manage workflow changes, resolve issues, and carry out quality assurance work efforts and stakeholder communications.



Measuring RPA effectiveness is critical for programme success. RPA Metrics must be collected and reported frequently, continuously reviewed and re-prioritised based on business needs.

# The Importance of a Robotic Operating Model

A **ROM** is essential to deploy an RPA programme. The earlier an operating model is defined and implemented, the higher the chance of enjoying long-term **RPA benefits**.



## ESTABLISH THE RIGHT IN-HOUSE SKILLSET

A lack of adequately trained or appropriately skilled automation specialists **can risk the success of an RPA implementation project** and minimise opportunities for achieving maximum benefits.

## DETERMINE ROLES AND RELATIONSHIPS

Define the extent to which the **RPA** will have **operational responsibilities**. The RPA organisation can also operate with different levels of centralisation according to different models: centralised, decentralised or hybrid.

## ENSURE STRONG GOVERNANCE PROCEDURES

Governance procedures include: consistently **communicating between business and IT representatives**, complying with **regulatory requirements**, laying out operational objectives, as well as having a plan for a potential fall-out of RPA.

## DEFINE KEY OPERATIONAL PROCESSES

This includes **identifying processes, prioritising and deploying** them for automation, as well as **developing and maintaining** the automated workflows.

## TRACK KPIs

To manage the performance of RPA within an organisation, establish a **performance management framework** – that defines process SLAs as well as financial, employee, and virtual workforce KPIs – should be established.

## AVOID LONG-TERM RISK

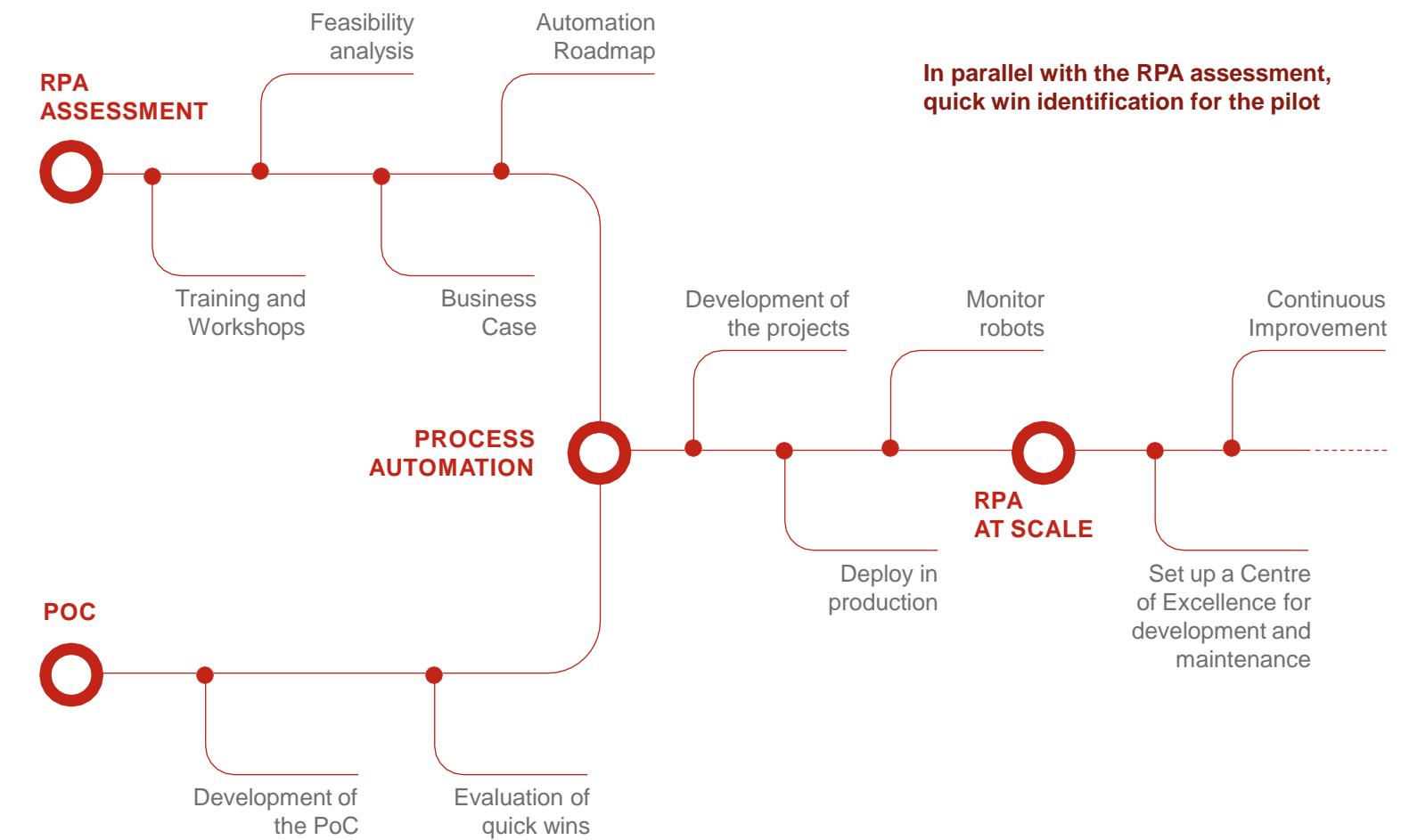
A well-designed, comprehensive framework for deploying RPA helps to create **lean, efficient, and cost-effective business operations** that **are not just efficient, but sustainable**.

# How to set up an RPA Programme

## HOW TO SET UP AN RPA PROGRAMME

### The RPA Journey

The RPA journey can either start with the **assessment** phase, which defines a strategic roadmap for the RPA programme, or it can start directly from preliminary prototypes of identified opportunities to achieve quick wins. The automation programme can then begin being deployed in the production of robots along with a continuous scale-up of the RPA workforce.





HOW TO SET UP AN RPA PROGRAMME

# Common Pitfalls and Mitigations during an RPA Project

Implementation risks should be effectively identified and managed during the **process assessment** and preliminary process **analysis** phases.

## PITFALLS



- Considering RPA as an IT-only topic and forgetting about IT
- Lack of an active RPA deployment team dynamically engaged with all RPA stakeholders
- Improper selection of automation opportunities
- Weak set-up of RPA service delivery
- Technology limitations and data restrictions
- Compliance risks
- Ineffective communication plans and change management programme
- Using an inappropriate delivery methodology

## MITIGATIONS



- Early IT onboarding and involvement
- Effective programme management and escalation
- Robust process assessment methodology to coherently estimate long/short term benefits
- Clear roles, responsibilities and SLAs for operating team
- Technology due diligence and early IT onboarding
- Business continuity planning
- Mature, dynamic and engaged change management programme and communication plan
- Deep analysis of the context to correctly choose appropriate delivery methodology

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## RPA on Field



# Capabilities of an RPA Platform

A modern and effective RPA Platform must be able to provide different levels of capabilities. From the most low-level **implementation capabilities** related to development activities, to **execution capabilities** that enable robots to perform complex tasks effectively and efficiently, to **governance capabilities** that support the CoE and business users in the planning and management of the automation program.

Implementation Capabilities	Execution Capabilities	Governance Capabilities
<b>Security &amp; Deployment</b> Features that allow secure and scalable deployment.	<b>Act</b> Ability to operate on different kinds of applications, in different environments, without errors.	<b>Automation Opportunity Lifecycle</b> Tools and best practices to track the lifecycle of automation opportunities: from proposal to evaluation, from analysis to deployment.
<b>Development Tools</b> Tools, languages and frameworks for effective development, testing and debugging.	<b>Understand</b> Ability to comprehend simple and complex data used in the execution of tasks.	<b>Analysis</b> Tools and best practices to support the analysis and documentation of processes.
<b>Interoperability and RPA Ops</b> Connectors and APIs to interface the core RPA system with other components.	<b>Interact</b> Ability to interact with human counterparts in diverse ways and for different purposes	<b>Monitoring</b> Tools to allow business-level monitoring of the execution of automated processes, as well as ROI KPI tracking.
	<b>Plan</b> Ability to correctly manage the queues of tasks to be performed, assign them to performing entities and handle errors in a robust way.	



# Project Phases



# RPA Democratisation

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RPA DEMOCRATISATION

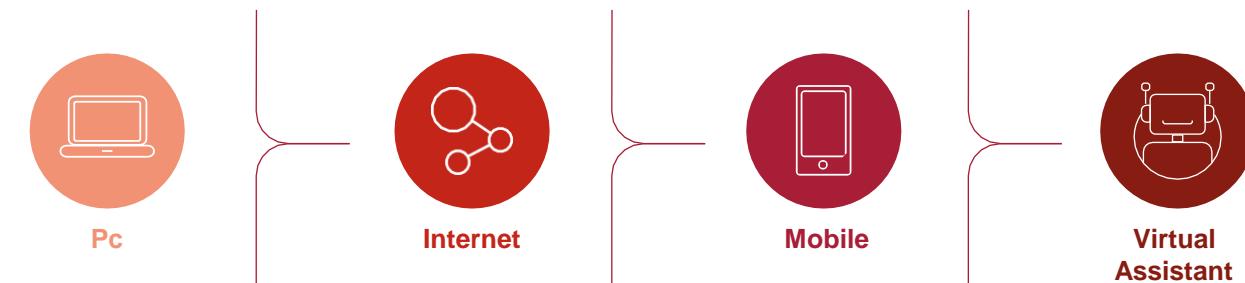
## An Assistant for Every Person

The concept of “*An assistant for every person*” takes its premise from the realisation that many tasks and activities performed by modern-day workers are often repetitive, mundane, and with little added value.

In such a scenario, employees and agents are forced by the nature of their work to focus on these tasks, neglecting more important and meaningful activities, with a detrimental effect on productivity, employee satisfaction, and overall effectiveness of the organization.

Just as the introduction of the personal computer, internet and mobile phones have in the past revolutionised our personal and professional lives, simplifying and empowering human activities, so has the recent rise in Artificial Intelligence and Robotic Process Automation technologies the potential to entirely replace a vast amount of those repetitive tasks.

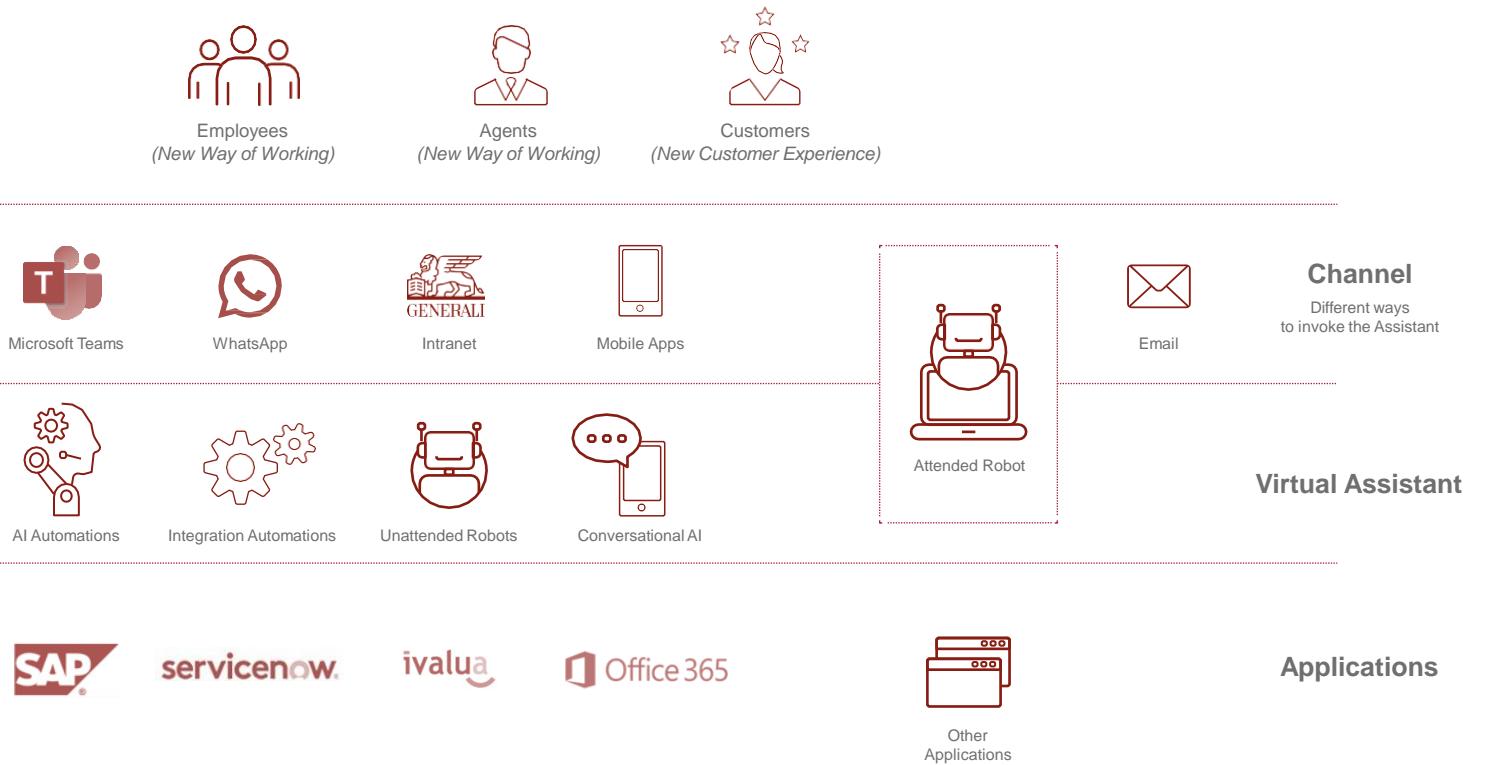
Given its potential impact on everyday activities, the concept of “*An assistant for every person*” could lead to a complete redefinition of the future of work, while widespread automation applied to customer activities can unlock a new and improved customer experience (CX).



# An Automation Ecosystem for a New Way of Working

In this scenario, an ecosystem of Virtual Assistants, made up of different technologies, will provide various services to employees (but also to Agents and Customers), across a broad spectrum of channels, from chat to web, to mobile.

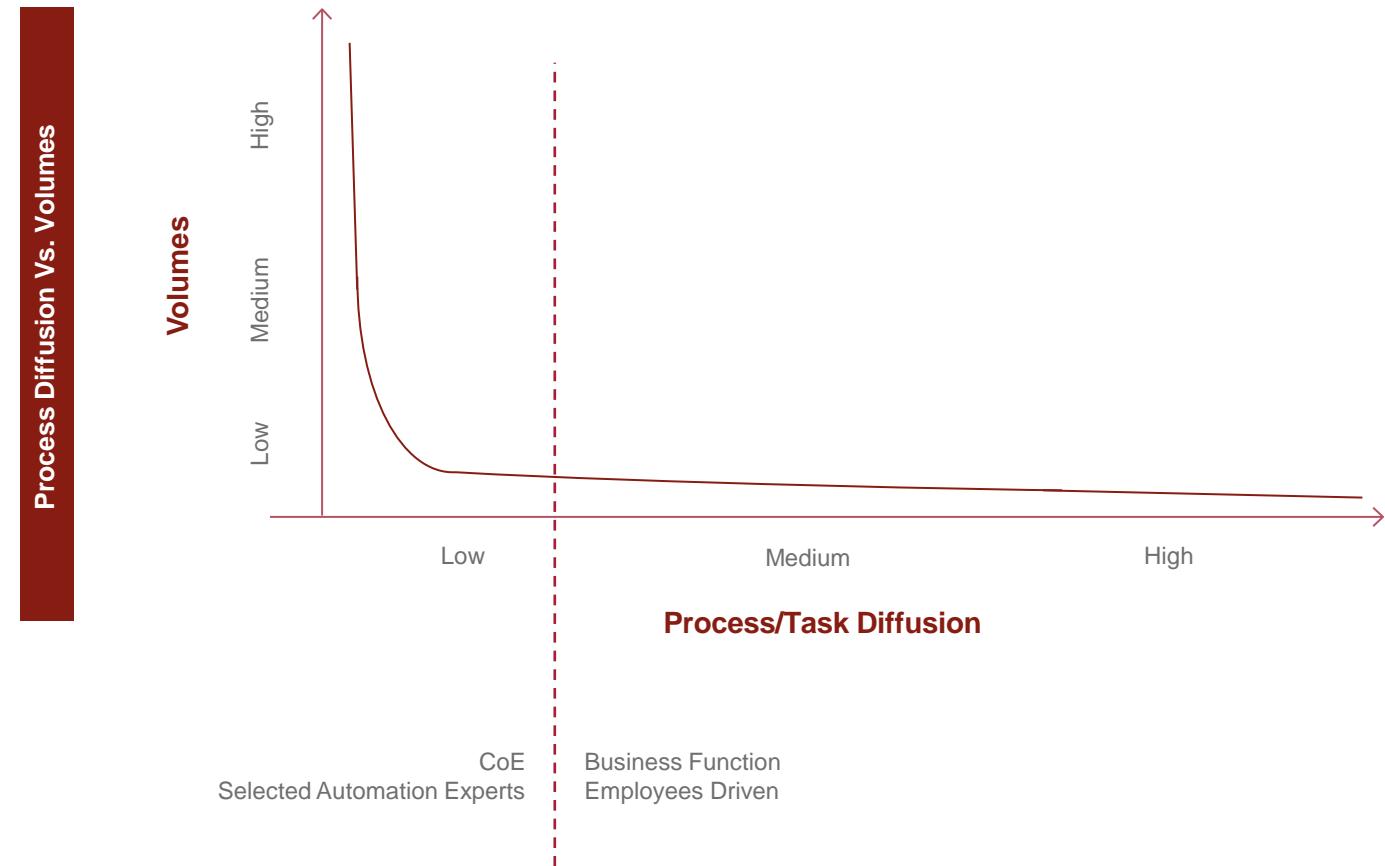
Robotic Desktop Automation (or Attended Automation) will be a special kind of Virtual Assistant, acting both as a channel, being hosted on the desktop of the employee, and as an assistant itself, delivering actual automations.



# The Citizen Developer

Within an RPA programme, a Citizen Developer is **a non-technical user that creates simple automations for themselves and their departments**. Citizen Developers can help scale up the RPA programme by reaching the “*long tail of automation*” that, for volume and cost reasons, cannot normally be addressed directly by the CoE.

## TASKS SUITABLE FOR CITIZEN DEVELOPERS



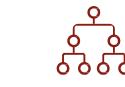
**Low average handling time**  
Tasks that require humans few minutes to be executed.



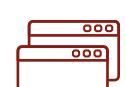
**Low volumes and diffusion**  
Tasks performed by a small number of people a few times a week.



**Low system complexity**  
Tasks spanning on well-known systems (i.e. SAP) and Excel.



**Low overall complexity**  
Maximum 20 steps, 1-2 systems, low exception count.



**Structured input / output**  
Excel files, Applications



**Low Risk**  
Avoid tasks that can pose financial, operational, compliance or reputational risks.

Although technically savvy, Citizen Developers are not professional developers and should limit their scope to simpler, low-risk tasks.

Furthermore, the standard tools provided by vendors for Citizen Developers (like UiPath Studio X) do not allow for the development of complex scenarios by design.

## RPA Use Cases

## RPA Success Stories

Internal and External success stories have been collected in order to provide examples of RPA application and its potential.

### USE CASES FROM GENERALI

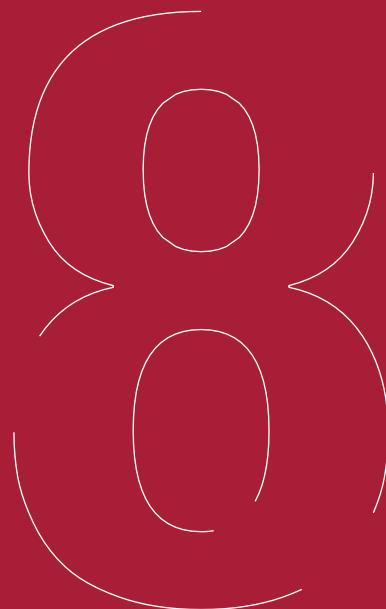
Internal Use Cases focusing on RPA application along the Value Chain, explaining the automation context and the Use Cases' details:

- P&C no-motor Cancellation
- IT Services Price Checking
- End-to-end Process of Simple Claims
- Vendor "Full" Qualification
- Handling Open Files for Motor Claims
- Cost Reports: Download, Aggregation and Preparation
- Online Claims Notification



JUST DO IT

# Final Tips on engaging with Robotics in your Business Unit



## References

