BC CE F&O P

Njoo Tuinue viwango!

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EAST AFRICA

DynamicsCon REGIONAL

AGENDA

- Intro to RPA
- RPA Platforms: Power Automate Desktop
- What RPA can do
- Industry Use Cases
- Where to Start
- Demo
- AI Integration in Power Automate
- Q&A

Intro to RPA

Robotic Process Automation is revolutionizing the way we work by automating repetitive tasks and freeing up human potential for more strategic activities

RPA uses software robots or "bots" to automate <u>repetitive</u>, <u>rule-based business processes</u> that typically require human intervention

Good Candidates

❖ **Repetitive and Rule-Based Processes:** RPA performs the same tasks repeatedly without fatigue or errors, following established rules and procedures.

❖ **High Volume and Transactional Processes:** Processes with many transactions and high data input are ideal, as RPA can handle large volumes efficiently.

❖ **Manual Handling Tasks**: Tasks that require a lot of manual data entry, form filling, or manual calculations are prime candidates for automation.

❖ **Structured Data Process:** RPA works best with structured data inputs like Excel, Word, XML, or readable PDFs [With AI, RPA can also work on unstructured data]

❖ **Stable and Well-Defined Process:** Processes that are stable and have a clearly documented workflow are easier to automate and require less maintenance.

❖ **High Compliance:** Processes that require audit trails for regulatory compliance are good candidates for RPA, as it can automate and track all steps.

RPA Platforms

Power Automate Desktop

Provides Seamless Microsoft 365 integration, user-friendly interface, cloud and desktop automation
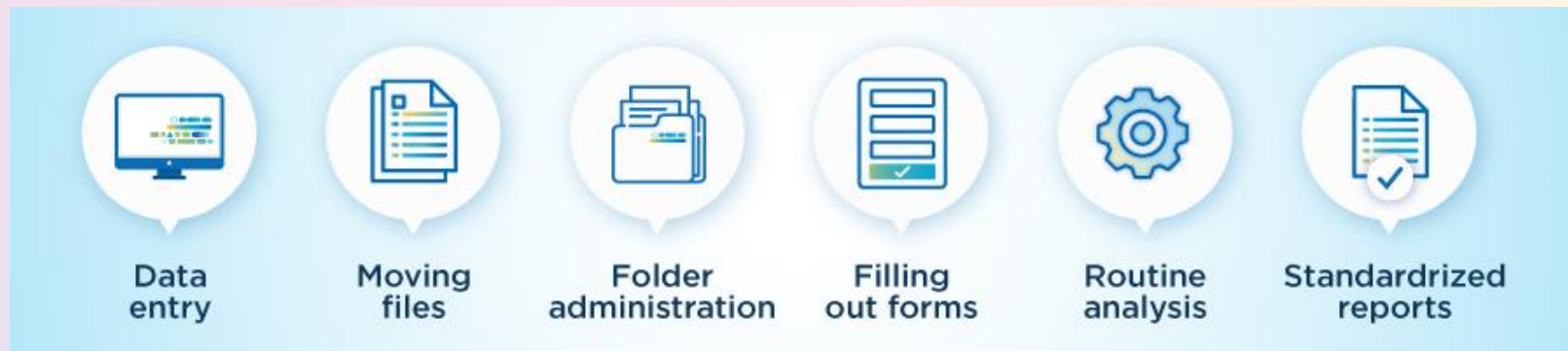
It offers these benefits

RPA can

RPA has the potential to transform the way companies do business and how work is done. Even the simplest of RPA bots can perform lower-value, repetitive work such:

Data entry | Moving files | Folder administration | Filling out forms | Routine analysis | Standardrized reports

When deciding which **RPA tool** to adopt to transform you company, it's important to ensure it is

User Friendly

Easy Integration

Security

Industry Use Cases

Financial Services & Banking

- Reconciliations
- Fraud Detection
- Risk & Compliance
- Customer onboarding
- Loan & Mortage Processing

Telecoms

- Network management
- Data transformation
- Debt collection
- Expense control
- First call resolution (FCR)

Manufacturing

- Invoice Processing
- Supply Chain Management
- Stock Management
- Accounts Payable Processing

Healthcare

- Appointment scheduling
- Patient records and data management
- Asset tracking and management
- Diagnostics and data analysis
- Patient outreach and post-treatment care
- Healthcare insurance claims automation

Insurance

- Registering and processing claims
- Underwriting
- Regulatory compliance
- Policy cancellation
- Sales and distribution
- Legacy application integration

Retail

- Demand-supply planning
- Product categorization
- Inventory management
- Call centre processes
- Marketing automation
- Sales analysis
- Customer Support

Where to start

1.Prepare everyone for automation and set expectations. For enterprise-wide buy-in, you'll need to develop a convincing RPA use case. Showcasing the benefits and potential return on investment (ROI) will help you get there.

2.Ensure your processes are set for automation by identifying and eliminating bottlenecks and siloes in your current processes. Process intelligence(combines process mining & task mining), monitors and maps your current business processes to determine which are ideal for automation and improvements.

3.Establish reliable governance so your industry standards are consistently met. Implementing a CoE is a great way to get employees involved in your automation strategy and ensure compliance.

4.Find a scalable operating model that works for you. Track your automation maturity so you can always identify where your organization is on its automation journey.

5.Think about the overall vision rather than focusing on small, task-based changes. The true digital transformation comes when you look at the bigger picture of automating workflows with intelligent automation.

Challenges you may face

Increased output

Difficulty selecting processes

Perception as "just an IT thing"

Employee backlash

Not involving IT in decisions

Unrealistic expectations

Scaling challenges

RPA successful implementation

Successful implementation will always consist of building, operating and orchestrating.

3 Types of RPA bots: Attended, Un Attended, Hybrid

Build

Operate

Orchestrate

DEMO

AI Integration in Power Automate

Copilot Studio

The UI for AI: any organization can build powerful agents that augment their workforce and execute business processes right inside Copilot Studio—without any coding.

Agents built in Copilot Studio can now operate independently, dynamically planning and learning from processes, adapting to changing conditions, and making decisions without the need for constant human intervention.

These autonomous agents can be triggered by data changes, events, and other background tasks—and not just through chat

Record with Copilot in PAD

Create a desktop flow just by sharing your screen and describing the task you want to automate. It's as if you were teaching it to someone else. Copilot will then analyze the recording to suggest an automation by harnessing advanced multimodal AI models.

Create desktop flows from description

You can now build a desktop flow just by typing out what you want to automate.

Whether you're starting from scratch or adding to an existing flow, you can simply describe your task in Copilot. And it will help you build it step-by-step.

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Keep Learning

THANK YOU!

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