

Process Mining for Partners Script

Slide 1: Introduction

English: Hello, and welcome to our Advanced Training on UiPath Process Mining (formerly ProcessGold).

Slide 2: Objectives

English: After completing this course you will be able to:

Identify opportunities for UiPath Process Mining

Describe the Value of UiPath Process Mining to customers

Differentiate UiPath Process Mining vs Competition

Access Additional Resources

Slide 3: Where Does Process Mining fit within UiPath's RPA Platform?

English: Let's begin with showing where Process Mining fits in the UiPath Platform.

Process Mining is part of the Discover suite of products, giving customers data driven insights and understanding of complex end-to-end processes, allowing them to continuously optimize and accelerate automation.

UiPath is the only RPA vendor with a platform that combines Process Mining and RPA, and of course, UiPath is the only vendor that combines their Process Mining offering with RPA. This gives us unique advantages in the fast-growing Process Mining market.

Slide 4: What makes UiPath Process Mining unique?

English: This gives UiPath customers an obvious advantage, because, with Process Mining, they get a clear view of how their robots operate as part of an end-to-end process, maximizing the impact of automations.

This is an important point: Not only will Process Mining give customers new insights into their processes, it also makes it easier for our teams to make recommendations as to how to automate these processes. And, once implemented, Process Mining then provides the continuous monitoring capabilities to look at how automations now operate as part of the process and have improved the performance of the process. This ability to turn insights into action is a unique differentiator for UiPath.

Slide 5: First, discover automation opportunities for immediate impact

English: However, before we go to Process Mining, we should introduce Task Mining. Task Mining is a companion product to Process Mining and also part of the UiPath Discovery toolset. Task Mining is a critical way to deliver insights on a desktop level.

The Task mining product records desktop-based clicks and keystrokes, and it uses AI to analyze how people get work done, making it the most effective way to prioritize those easy-to-automate, repetitive tasks with fast ROI.

Slide 6: Then, take a holistic approach to process optimization

English: Then, using Process Mining, organizations can take a holistic approach to end-to-end process optimization, that will propel their automation to greater heights. It visualizes complex end-to-end processes, simply and intuitively, showing all inefficiency and risk, so that clients can discover new areas for optimization.

Slide 7: Who are the buyer personas for Process Mining?

English: Let's now introduce the three different buyer groups for process mining, which is similar to the buyer personas for RPA, but includes one new group: Global Process Owners

The first group is business-driven. These are COOs, CFOs and global process owners who are concerned with business outcomes of specific processes, operational efficiency and reducing cost. They would use process mining to drive digital transformation and making processes more resilient to external pressures.

Slide 8: What is a process in Process Mining?

English: For licensing purposes in process mining, a process is defined as follows: an end-to-end, chronological sequence of steps, whose definition is extracted from enterprise applications such as ERP and CRM.

In order to build this process definition, Process Mining uses a Case ID. Every process in process mining has a unique Case ID. An example of the Case ID for Procure to Pay is Purchase Order. The Case ID for the Accounts Payable process is a Purchase Invoice.

Slide 9: Typical Processes - Introduction

English: While Process Mining technology can be applied to many different processes, the market and our customers tend to focus on the high-impact processes of which a sample list is shown here. Purchasing, Finance, Supply Chain, IT, and Operations are the departments with the most take-up of Process Mining solutions, but Tax, HR, and industry-specific departments like Claims Processing also find high-impact use of the technology.

It is important for you to think about 3 key aspects of the target process at your customer:

1. Which department and global owner do I target
2. What underlying systems does my customer operate
3. What are the key Performance Metrics my customer is looking to impact.

Slide 10: The Three Tiers of Processes

English: Process Mining can be used on almost any process and in combination with any system, however our sales strategy will focus on a select number of processes and systems. For this reason we have divided processes into three tiers.

Tier 1 processes are processes we know well, and in many cases, an out-of-the-box connector is available.

Tier 2 processes are processes that we have limited experience with, but we know the underlying systems well

Tier 3 processes are processes that we have very limited knowledge of.

UiPath Process Mining sales will mainly focus on Tier 1 and Tier 2 processes.

More information on the Three Tiers can be found in additional resources at the end of this presentation.

Slide 11: Three Tier Process Continued

English: Here is an overview of the processes that fall in the three tiers.

Tier 1 includes the Purchase to Pay and Accounts Payable for SAP

Tier 2 processes includes various financial and operational processes for SAP, Oracle and ServiceNow

Tier 3 covers all other processes and systems, especially homegrown applications and systems

More information on the Three Tiers can be found in additional resources at the end of this presentation

Slide 12: Process Mining Sales Motion

English: There are several nuances to the Process Mining sales motion that are important for you to understand.

First off, especially for tier 2 processes, a data discovery workshop might be set up by your pre-sales team to help establish the specifics of the customers intended data sets.

The next stage can either involve a Proof of Concept or a Pilot. A PoC is a 2-5 day pre-sales event demonstrating the viability of UiPath process mining using a limited customer data set. This is only possible for Tier 1 processes

The alternative option is a Pilot, which is a 2-week paid engagement that is only applicable to Tier 2 and 3 processes.

The service delivery project is a project to implement one process. Implementation time is between 2-4 weeks.

There is no one-path to process mining implementation, a combination of these sales tools may be necessary depending on the requirements and situation of the prospect.

Slide 13: Process Mining Sales Specialists – introducing our sales overlay structure

English: The sales structure for process mining differs from the usual UiPath sales structure. An overlay team of Process Mining Sales Specialists is being added to help drive and support you with Process Mining specific knowledge, and access to our Process Mining community..

You as the owner of the account will continue to lead the conversation with the prospect, but the Sales Specialist brings extra know-how and support for Process Mining opportunities or deals that have PM SKUs in them.

Slide 14: How do Clients

English: Let's now look into the unique value of Process Mining for customers:

The client is already running a successful automation program, but they would like to do more.

How can they:

Maximize the ROI from automation

Optimize how robots, systems and people interact in a process

Engage business users to realize change

And ultimately, accelerate and scale RPA?

The answer lies in processes...

Slide 15: How can you uncover your processes?

English: Most people have an idea of how a process runs, but digging a bit deeper, the process isn't as straightforward as you might think.

Trends, patterns and details of how an entire process runs are waiting to be discovered. Let's look into how it works.

Slide 16: A holistic look at end-to-end process optimization

English: The first step of Process Mining is connecting it to the data source. UiPath process mining can be connected to many different IT systems. The most common you will come across are SAP, Salesforce, ServiceNow, Oracle and Microsoft product suites. Using event logs, the data is then transformed into a process graph, allowing customers to visualize their end-to-end processes holistically, revealing all process bottlenecks, deviations, inefficiency and risk. **Slide 17: A holistic look at end-to-end process optimization**

English: AppOne, our ready-to-use process mining template, contains predefined dashboards so you can look at your process from different perspectives.

For example, which part of the process is automated?

How fast is the process executed, and did we meet all our deadlines?

Does the process conform to the model?

How do different teams, countries or users interact in the process?

Slide 18: A holistic look at end-to-end process optimization

English: Process Mining allows users to go from a helicopter view of the end-to-end process to the deepest details. This makes it easy to understand what is happening by viewing individual process instances.

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Slide 19: A holistic look at end-to-end process optimization

English: Customer-specific business logic can be added in the form of tags and KPIs. These make the desired business outcomes explicit and make it easy to see whether you are meeting those or not. Example KPIs include Invoice processing time, PO cycle time, % of non-conforming processes. Tags are a unique feature of UiPath Process Mining. They make it possible to define process-specific outcomes that you want to prevent. Examples are SLAs violations, or separation of duties concerns.

Slide 20: Continuously monitor and improve the process

English: The great value of process mining lies in its extensive continuous monitoring capabilities, allowing businesses to constantly have a view of their process, to optimize how their robots, people and systems interact.

There are two parts to continuous monitoring and improvement. The first is understanding the process, for instance, how does automation perform in the context of the end-to-end process?

The second is optimizing the process using those insights, taking steps to strengthen the interactions between robots, people and systems.

Slide 21: Continuous Improvement Cycle

English: The product contains features to facilitate continuous monitoring of the process, like compare bars and history charts. They make it easy to see the impact of changes on a regular basis, every month, every week, every day.

Slide 22: Continuous Improvement Cycle

English: Continuous monitoring allows you to evaluate your automations in the context of the end-to-end process and compare processes over two time periods to better understand the impact of changes. When you make changes to one step in your process, it's often hard to predict how it will affect the whole system. With Process Mining, you can see exactly that.

Slide 23: Continuous Improvement Cycle

English: Process Mining gives you the ability to see whether new bottlenecks have emerged after implementing automation, and what the overall impact is on your end-to-end process.

Slide 24: Democratized insights for business users

English: Process mining was created for business users, and no technical background is required for a process user license. Using intuitive, easy-to-use visualizations and dashboards, users are engaged as active participants in process optimization. This activates them to work towards clear common goals to step-by-step improve the whole end-to-end process.

Optimizations can come in the form of ideas for new automations, or new ways to work better with the current automations.

Slide 25: Democratized insights for business users

English: The platform has role-based access and easy KPI dashboards that were designed for business users. This allows the people directly involved in the process to be the drivers of continuous process improvement.

Slide 26: Accelerate the Automation Flywheel Enable end-to-end automation, from process discovery to robot implementation

English: In summary, Process Mining accelerates the automation flywheel by providing

- 1) a holistic view of end-to-end processes
- 2) continuously monitoring and improving those processes and;
- 3) democratizing insights to process users to drive process optimization.

Slide 27: Customer value Drivers

English: How does Process Mining contribute to the Customer Value Drivers?

1. It allows you to continuously monitor and optimize your processes for operational efficiency
2. Better, more efficient internal and external processes leads to an improved customer experience
3. Better processes means your teams are working at their optimal best
4. Process mining leads to stronger, more resilient processes. Processes aren't static, they need to be continuously adjusted to keep up with internal and external developments. Process Mining gives you an x-ray view of your processes at all times.

Slide 28: UiPath Process Mining Licenses

English: For Process mining, we offer the following three license types: a License per Process User, a License per Developer user, and a License per process-mined process.

- The *process user* can view dashboards to get insights in their processes and can monitor them over time.
- The *developer user* can set up the data extraction and transformation to make process mining possible.
- For each *process* the customer wants to process mine, a *process license* has to be acquired.
- There is a non-production version available for this license, if customers want a separate development or testing environment.
- Finally, to get started with process mining, each new customer must acquire the appropriate services. To make this easy, there is a *Process Mining Starter Pack*, please see additional resources.

I hope this information was valuable for you. Many thanks for attending this course, and happy mining!

