US

FEATURE

8 keys to a successful RPA implementation

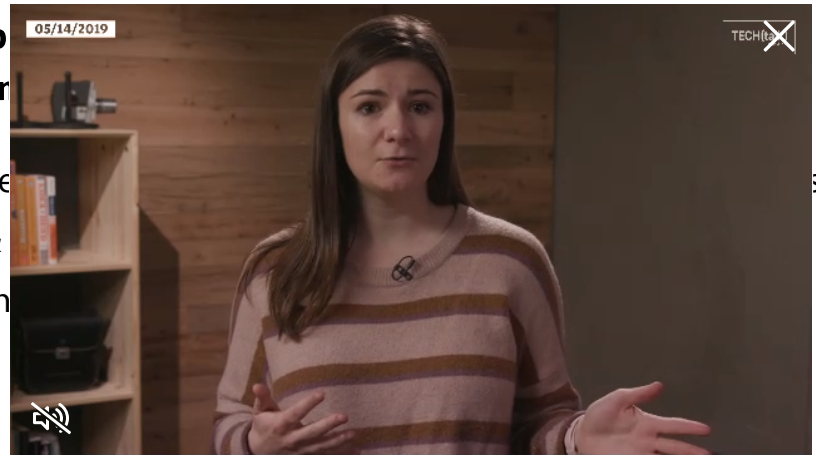
Robotic process automation can reap efficiencies and free up staff time for higher-value tasks. Here's how to do RPA right.

By Bob Violino
Contributing Writer, CIO
JULY 26, 2018 03:00 AM PT

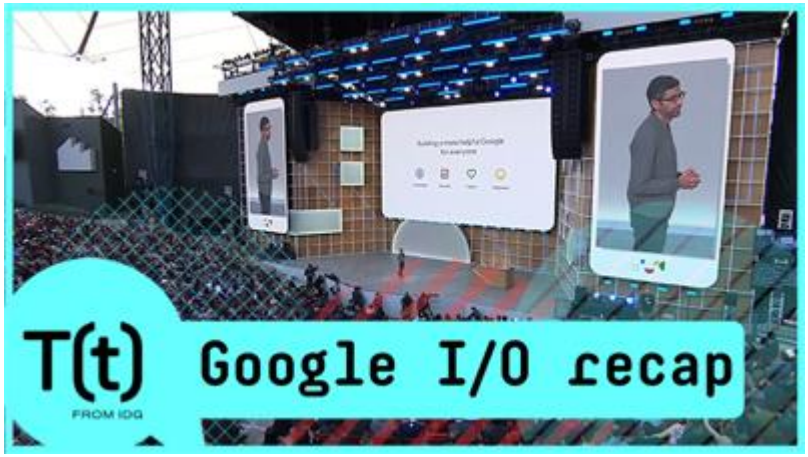
Robotic process automation (RPA) is gaining traction at a variety of organizations, thanks to its promise to offload time-consuming, mundane tasks to "software robots" that can perform them faster and in many cases more accurately than humans can. This strategy for streamlining operations offers the added benefit of freeing up staff time to tackle higher-value efforts — an important advantage for organizations undertaking digital transformations.

But RPA implementations are challenging, with no guarantee of success. In fact, if not done properly, a shift to RPA might end up creating more problems than companies bargained for.

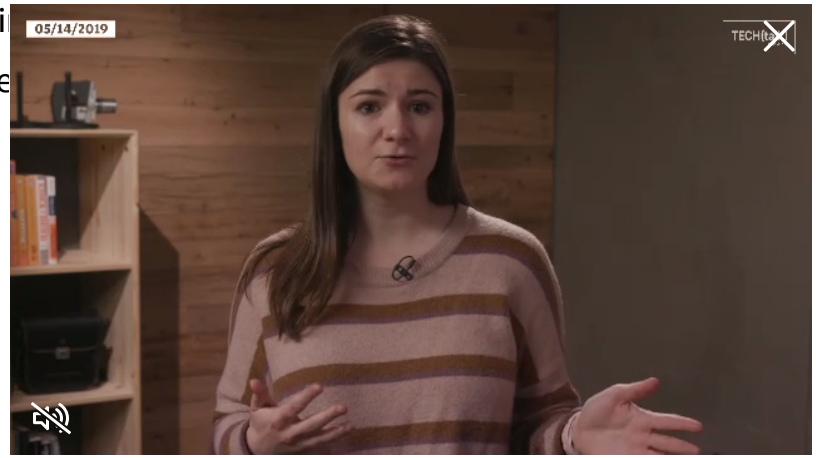
[Find out why RPA is poised for a big business breakout and why RPA imp
answers with our robotic process automation explainer. | Get the latest ir



One of the most common reasons why RPA implementations fail is the existe s,
says Frank Casale, founder of the Institute for Robotic Process Automation &
professional association for buyers, sellers, influencers and analysts within th



“This is after all a disruptive technology, and most managers don't want thei
says. Other common reasons for failure include poor planning, poor use case
meet the organization’s needs, he says.



Here are some suggested best practices for a successful RPA deployment.

Do the research

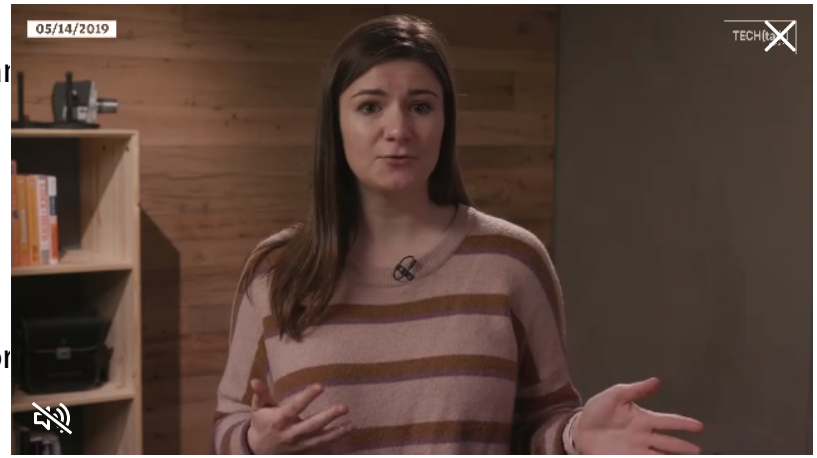
RPA is a relatively new technology and market, and the vendor landscape, product offerings and features have shifted in recent years. Before plunging ahead with a deployment, do your homework and invest the time to build a business case for RPA and learn about the products available, Casale says.

“Realize that you will need to check three key boxes to get to success, and two out of three won't cut it,” Casale says. These three boxes include: choosing the right technology solution to meet your organization’s specific needs; creating a solid business case for RPA, including developing return on investment (ROI) metrics; and assessing current processes and organizational issues to avoid political problems.

[Looking to upgrade your career in tech? This comprehensive online course teaches you how.]

Because RPA is new and internal expertise is likely limited, it might make sense to seek help from an expert adviser when developing a strategy, selecting a vendor, and deploying and maintaining RPA solutions.

“RPA programs require transformation,” says Tony Abel, managing director at consulting firm Protiviti. “Transformation from within is challenging, given current media attention around robotics, cognitive computing, and other AI-spectrum technologies. These technologies will de-skill a sizable portion of existing enterprise organizations as we know them, and those human resources are not eager to train the robots that might replace them.”



Experts can help navigate this challenge by creating a vision for the future ar
opportunities for displaced workers, Abel says.

Educate staffers about RPA

Because it’s a disruptive technology, RPA can cause a lot of angst among wor
technology will and will not do with regard to employees’ job roles.

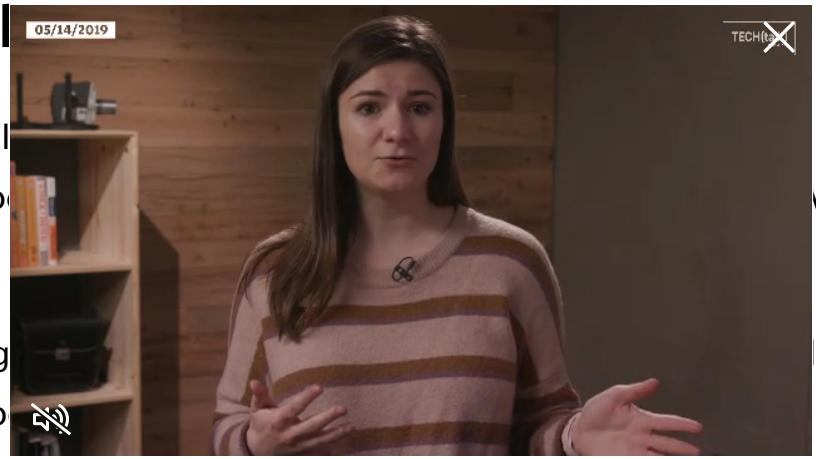
“Educate everyone in the organization about benefits of RPA and the approach your organization is taking,” says Janesh Patel, vice president of hotel technology at the Wyndham Hotel Group, the world’s largest hotel company.

“There is lot of commotion about job loss in the industry,” Patel says. “For us, RPA is strategic in helping our technical services staff perform routine tasks quickly and efficiently, so they can spend time in engaging with our franchisees and guests addressing higher priority needs.”

Wyndham opens two new hotels per day every day of the year, and a priority is to bring those hotels onto its property management and central reservations systems as quickly as possible. The volume of new hoteliers joining the system is a challenge due to the time needed for hotel data services on new franchisees to be entered into the platforms and with other onboarding tasks.

“Since our volume fluctuates throughout the year with onboarding new properties, we had to leverage automated solutions to reduce resource constraints in meeting our business demands, reduce up-front costs for our franchisees, and reduce volume for our property technology help desk,” Patel says. In 2014 the company deployed an RPA system from Kryon to automate these functions, and was able to reduce franchisees’ upfront costs, decrease help desk volume, and provide better onboarding experiences for its new franchisees.

Determine where the technology will work b



When deploying RPA tools, it’s best to identify processes where you’re most l
greatly increase your likelihood of success in modernizing your business pro
targets might not be easy.

“Building your initial pipeline and coming up with a plan to prioritize the hig
says. “As the process automation journey matures, be ready to refine the pro

To improve its RPA processes, Wyndham leveraged process discovery products — basically, bots to define where bots can work — to accelerate its implementation and to validate which processes would have the highest returns with RPA.

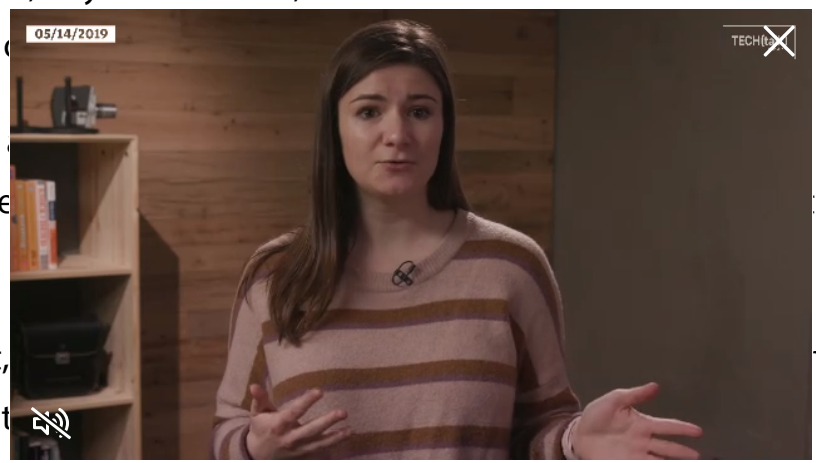
Financial services provider FBMC Benefits Management deployed RPA to help automate the process of extracting data from systems in order to create reports for insurance carriers, which was taking up 60 percent of the workday for some employees.

The firm was highly selective about where to apply the technology, which is now extracting, running, and validating reports with 99 percent accuracy. RPA "runs in the middle of the night, extracts relevant information from our proprietary system, and generates a file [that's] ready to be sent securely to a carrier," says Sajed Khan, COO at FBMC. The technology allowed the firm to shift workers to more sophisticated roles within the technology department.

"Great candidates for [RPA] are those tasks that are repetitive and frequent," Khan says. "It's easy after having a successful RPA deployment to assume that everything can and should be automated. Our experience has shown that successful automation is when there is little to no human interaction in the automation sequence. Processes that don't exhibit this trait aren't seen as viable candidates for automation."

Keep it simple and modular

RPA doesn't have to be complex. "Build bots as common and reusable objects," says Mona Kahn, director of securitization and servicing technology at Fannie Mae, a U.S. government-sponsored provider



"When we build out a process, we try to build as many generic components minimize the failure points, make it much easier to update if and when some before deploying to production," Kahn says.

Fannie Mae began its RPA journey in late 2016 with a small proof of concept, 2017. The driver behind implementing RPA was to decrease risks by automat efficiencies by simplifying and automating processes at scale, and creating capacity for staff to work on more valuable activities.

“All of these ultimately lead to becoming a smarter workforce and improving our customers’ experience,” Kahn says. The organization is using an RPA tool from Blue Prism.

Don’t neglect data security

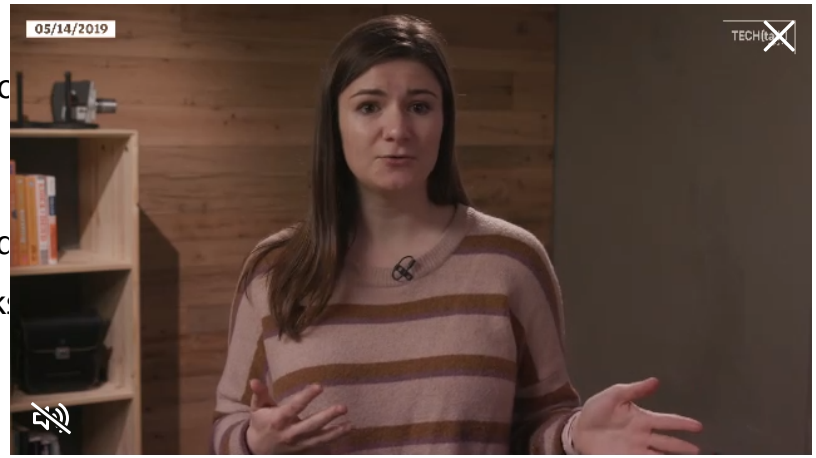
Companies can get so caught up in the rush to automate processes that they don’t take security into consideration.

“Service security is very important, as transactions are processed with incredible speed,” says Andrea Martschink, head of robotics strategy, business development and projects at the IT Enterprise Content Management Department of conglomerate Siemens AG.

“It must be ensured that processes cannot be manipulated,” Martschink says. “The more critical the respective business process is, the more attention and efforts need to be made with respect to stable and secure execution.”

Siemens launched a “professional RPA service” in October 2017, which is now available worldwide within Siemens. The platform allows for structured and unstructured information such as text, speech, files and email to trigger an RPA bot, which is used to automate various tasks. The main benefits the company is seeing are cost reduction, quality improvement, and faster response times, Martschink says.

Test implementations regularly



RPA work is not done once systems have been deployed. Companies need to
and address any weaknesses.

Insurance company Unum Group began using RPA in 2016 when it deployed
Pegasystems to help its contact center automate various administrative tasks

Unum's customer service representatives previously had to log into several different systems for simple tasks such as changing a customer's address, then copying and pasting information in other secure fields. The system captures data from various legacy systems to help with changing addresses.

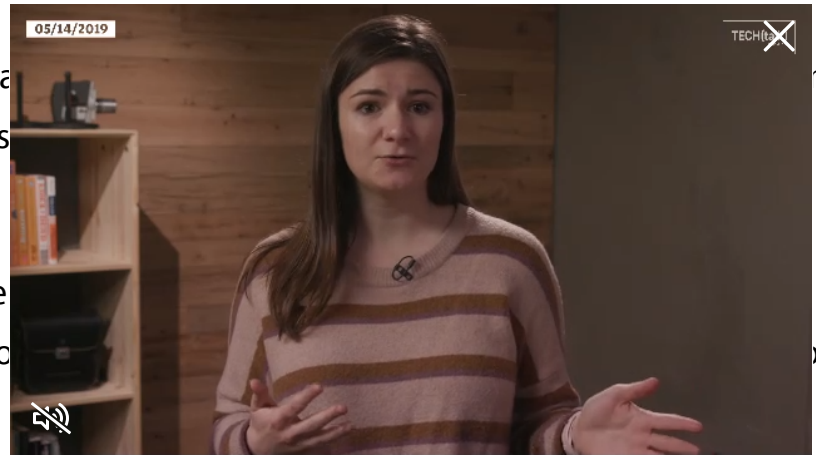
"With an increased focus on improving our customer experience, we needed a solution that eliminated these administrative tasks and gave the customer service agent more time to focus on the customer's claim," says Rex Price, technology capability manager of Shared Services at Unum Group.

Unum relies on its business users to help with user acceptance testing of RPA. "Individuals testing who may not do this sort of work on a regular basis can sometimes only check for positive tests," Price says. "Therefore, it's essential to have a robust test strategy ensuring that both positive and negative tests are completed."

It's also important to conduct performance testing on desktop automations using legacy systems, to ensure the desktop can handle the additional infrastructure requirements of the automation, Price says.

Develop a cross-functional center of excellence

As the use of RPA expands through an organization, it might make sense to create a center of excellence to share experiences and best practices.



Engineering, procurement, and construction company Bechtel began its fora n Bechtel Business Services, an organization that provides a variety of shared s payroll, and corporate systems.

The proof of concept involved automating the human resources manageme matching HRMS changes with supporting documentation to identify non-co of corporate systems at Bechtel.

Following the success of the POC and pilot processes in finance and human resources, the company in 2017 established an RPA Center of Excellence as a shared service for all Bechtel business units and functions.

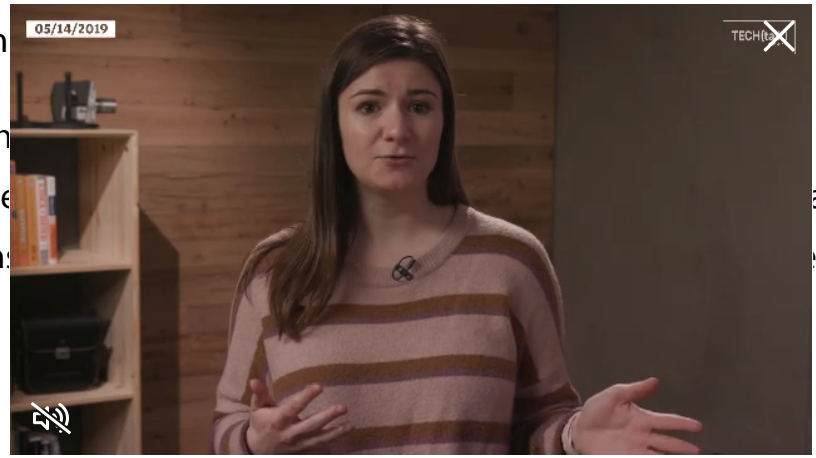
"Our Center of Excellence consists of developers based in IT, as well as in shared services functions such as HR and Finance," Wildfang says. "This allows the team to leverage both technical and functional expertise. The team also consists of part-time developers who are brought in full time whenever demand increases."

Since establishing the center, "we have deployed nearly 40 bots within various Bechtel departments and business units," Wildfang says. "So far, increased productivity is one of the tangible, and most encouraging, results we have seen from the implementation of RPA bots. By shifting routine and transactional activities to our 'virtual workforce,' we free our colleagues to focus entirely on complex, judgment-based, and value-added processes for our customers."

Prepare for future advances and challenges

RPA is continuing to advance and it's important to keep up with the changes. "As RPA adoption increases and more human labor is digitized into organizational capital, RPA technologies will provide more advanced cognitive capabilities and/or integrate further with cognitive capabilities," Protiviti's Abel says.

The technology will likely evolve to include self-building robots, verbal controls and interactions, and course corrections based on advanced learning capabilities, to handle a greater number of exceptions an

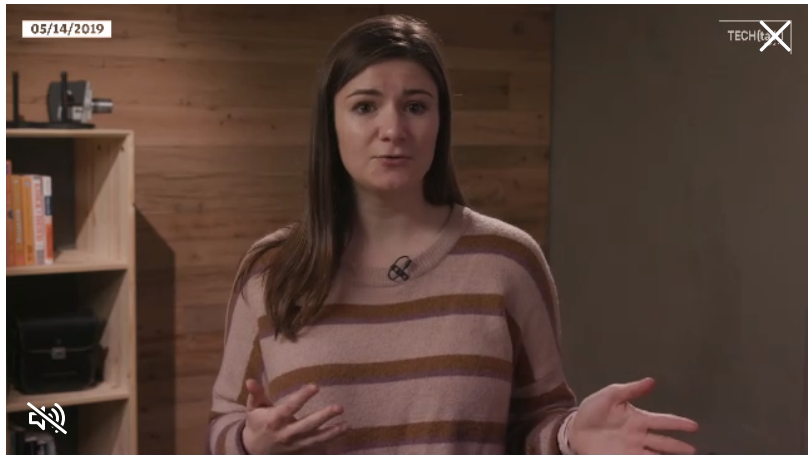


"Process automation will be used so expansively that organizations will even
Abel says. Those old enough to remember a time without mobile phones "ne a
that would be used by our families, or which of the hundreds of service plan
or some other device was best suited for our use," he says.

RPA will be much the same, although with significantly more complexities. “How do we track, manage, and maintain all of the production bots running throughout the enterprise?” Abel says. “What about the desktop automation every employee has developed independently for his/her individual use? How will the introduction or elimination of enterprise applications impact the thousands of bots that have been developed and deployed across the existing technology landscape?”

More on IT strategy:

- What is RPA? A revolution in business process automation
- 5 reasons RPA deployments fail
- RPA is poised for a big business breakout
- 7 RPA training and certifications courses
- Why RPA bots are poised to disrupt the enterprise
- Robotic process automation is the killer app for cognitive computing
- The 12 biggest issues IT faces today
- IT’s worst addictions (and how to cure them)
- 8 early warning signs of IT disaster
- 6 hard truths IT must learn to accept
- 12 'best practices' IT should avoid at all costs
- 9 forces shaping the future of IT
- 12 bad habits that slow IT to a crawl
- 10 old-school IT principles that still rule
- 9 warning signs of bad IT architecture
- An inside look at 10 real-world digital transformations
- The new rules of IT-business alignment in the digital era

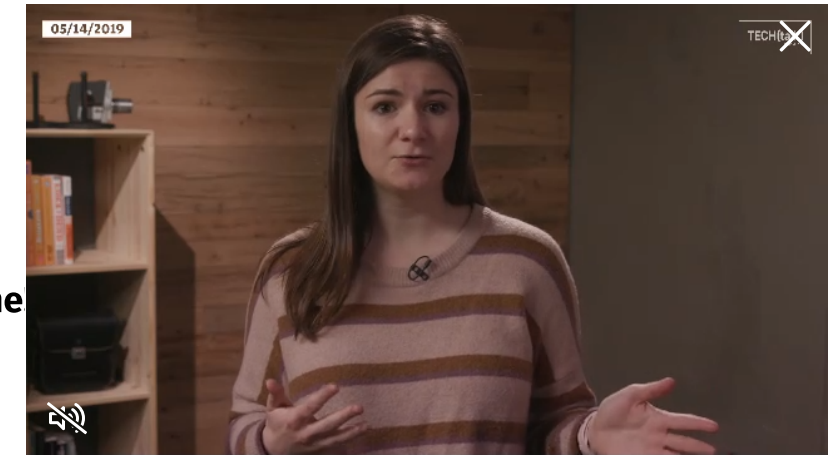


Next read this:

- *15 IT resolutions for 2019*
- *The 9 new rules of IT leadership*
- *20 ways to kill your IT career (without knowing it)*
- *IT manager's survival guide: 11 ways to thrive in the years ahead*
- *7 key IT investments for 2019 (and 3 going cold)*
- *10 signs top talent may soon leave*
- *11 red flags to watch for when hiring*
- *7 things IT should be automating*
- *8 digital transformation mistakes (and how to fix them)*
- *8 IT cost cutting mistakes you need to avoid*
- *Why IT-business alignment still fails*
- *CIO resumes: 6 best practices and 4 strong examples*
- *4 KPIs IT should ditch (and what to measure instead)*
- *6 practices of influential IT leaders*

Bob Violino is a contributing writer for Computerworld, CIO, CSO, InfoWorld, and Network World, based in New York.

Follow



FREE Download: Get the Spring 2019 digital issue of CIO magazine