PEOPLE, PROCESS, TECHNOLOGY:

The Winning RPA Formula

Technology

Process

Vision & Strategy

Customer

People

The business world is excited about automation. It's creeping into every day life, slowly yet surely. There are vast amounts of content on what it can do for your business, how it will revolutionise the way we work. However sometimes it is worth going back to level zero to contemplate what foundations need to be laid to create a successful automation strategy.

In his talk at the 3 rd RPA and Intelligent Automation Summit, Sebastian Antony, Portfolio Lead Enterprise Machine Learning at Barclays International, did just that. He stresses the PPT approach - People, Process and Technology - the key areas to focus on.

Antony recommends starting with the customer. If you don't start with the customer the longevity of what you are trying to achieve will be short lived. It's harder to build a business case without the end game, i.e. the customer in mind.

"Imagine going to your CEO and saying by doing this automation our customer revenue intake and our bottom line will shoot up by 10%, that's a much more powerful approach than saying give me a million and I'll do some automation!"

The customer then drives the vision for what you want to achieve with automation. What are those key KPIs and metrics? If you are able to convert those metrics into your PnL then you've taken ten steps ahead on this journey. Next you can focus on strategy. Is it a long term or short term strategy? Do you want automation to be a more strategic or tactical approach? Have those questions clearly defined and get your leaders or executive sponsors to give you the answers. It's important to know their long term plans too. Whether your CEO is going to give you money for one year or five years will affect your other decisions, such as what the budgets will be, which vendor to work with. Everything starts to tie up.

Once you have this groundwork in place you can move onto process. What is your process for managing policies? Do any of these policies need changing? What is your process for vendor selection? What kind of customer journey and end-to-end processes will you focus on? Look at your pipeline, how will you select the processes? In a change management environment Antony calls it 'the plan for a plan' – you need to have a plan for a plan to automate. That's how you gain widespread support. If you are able to define the

processes and have it documented, your governance teams will come to the table and talk to you.

Next is people. What is your strategy for your workforce? Will some people lose their jobs? You have to decide how you will change your culture, mind-sets and behaviours. If you get it right, you will have an army of people behind you, supporting you, which is absolutely critical. It can't be a handful of job titles in one section of the company working on an automation transformation. It needs to be a widespread adoption. Equally important is communication with your executive sponsors. How will you communicate your progress with them? Is it a monthly slot on the executive meeting table for example?

And finally, the technology. How will the software work with your ecosystem? Most companies have an ecosystem that is at least ten years old. Will integrating something into that infrastructure work? Sweat the assets and the vendor knowledge and figure out how that integration will work.

Laying the foundations is critical when it comes to automation implementation. Once you've completed these sections; the customer, vision, strategy, processes, people and technology when all these are ironed out well, there should be success. Get any of these wrong, whilst you can still get there, it will be more difficult. The bottom line is that it has to be customer driven, process led and technology enabled.

# PUTTING THE PEOPLE, PROCESS & TECHNOLOGY APPROACH INTO PRACTICE

Speaker and Industry expert on Shared Services and Intelligent Automation, Tilak Banerjee, spoke at the 3rd RPA and Intelligent Automation event on developing cognitive capabilities for better decision making. From his talk we show how the people, process and technology approach can be put into practice.

We have to be prepared for a hum-bot existence so how do we make that happen? Banerjee suggests it is about the culture within your organisation. Does your organisation have that culture which rewards thinking differently? For example encouraging staff to use their working hours to think outside of the box. Does your organisation have a systematic, continuous and effective way of capturing employee ideas?

People need to see that you are taking tangible steps to invest in them. And this can be demonstrated with a commitment to reskilling – developing an RPA training program. As can be seen in the diagram on the right.

PEOPLE
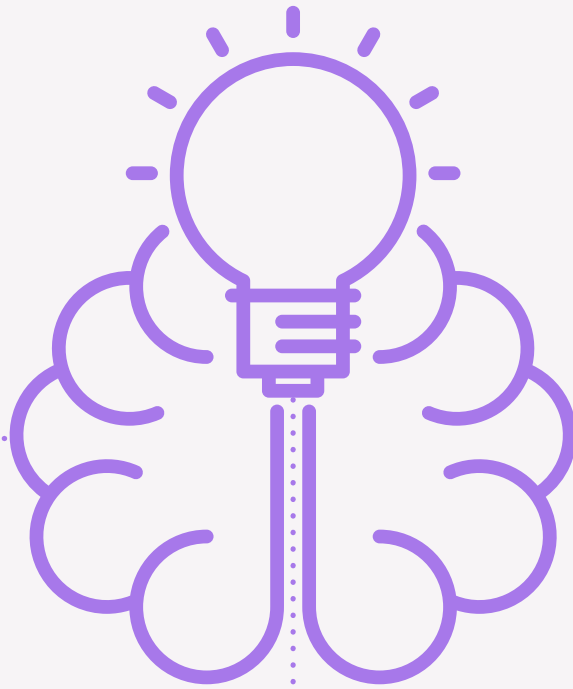
RPA Training

- Develop an in-house training program on the RPA tool; or

- Partner with your vendor/s to develop or utilize their tool training curriculum
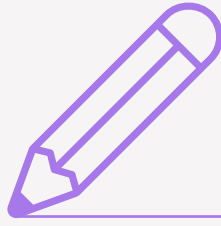
Projects

- Encourage the business users/trainees to pick up RPA projects

- Help shortlist and assign project ideas

Certification

- Support project implementation through RPA COE

- Certify the user/ trainee on successful deployment of the bot

Train people from business/operations on RPA

PROCESS

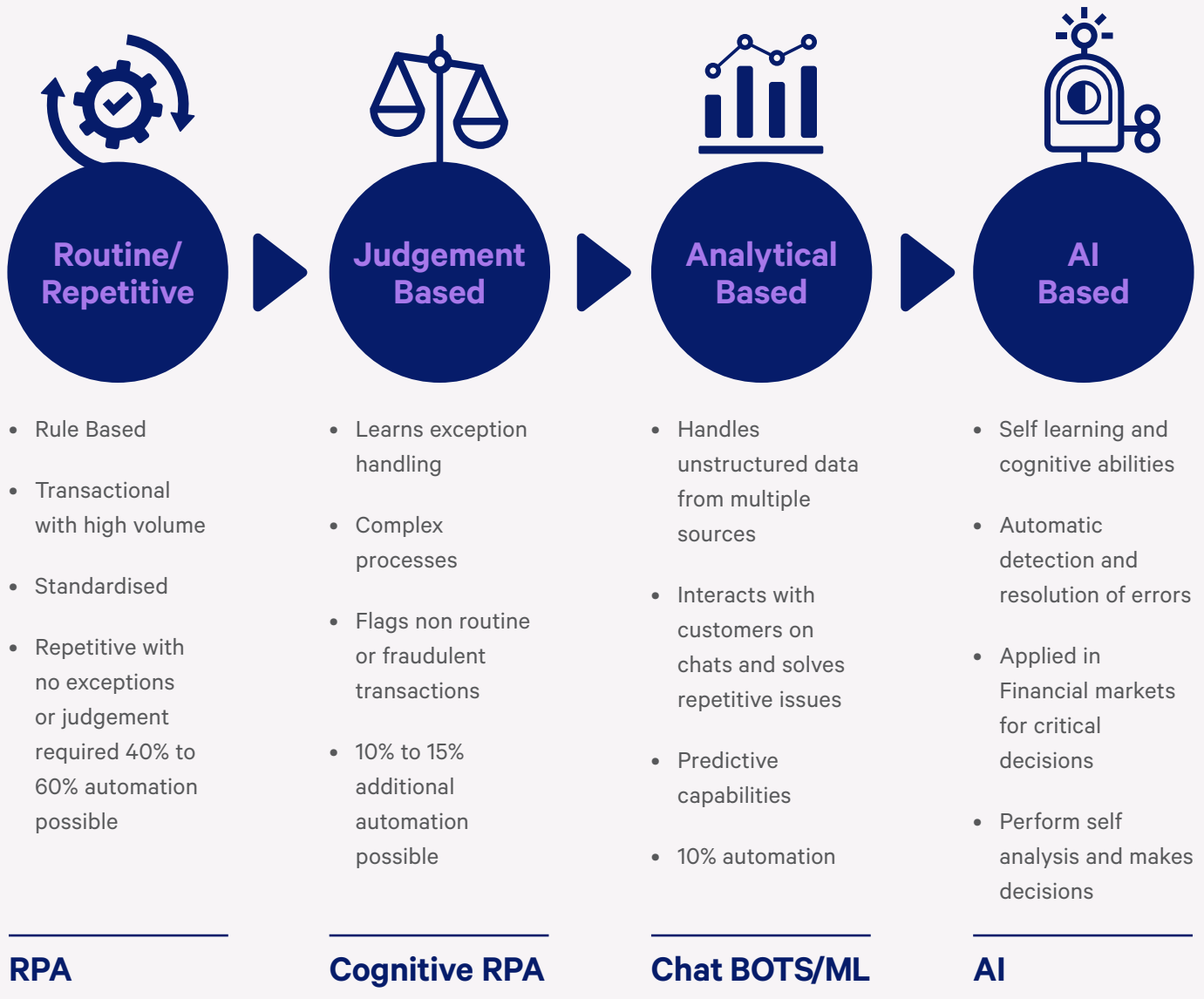Create a master plan for how you will approach automation. For each business unit and function address the Real and Perceived Hurdles.

Real hurdles could pertain to job and knowledge loss and selecting the right process for automation. Perceived hurdles are often bigger and could prove trickier: For example the complexity and uniqueness of processes, loss of control, disruption of operations and rogue bots

TECHNOLOGY

RPA is evolving steadily and the below diagram shows the natural steps of progression. The value that will be drawn from this cycle is when businesses start to apply analytics and mine the data that RPA throws at them. When the machines can start to offer insight that can help with business decision making.

Routine/Repetitive

- Rule Based
- Transactional with high volume
- Standardised
- Repetitive with no exceptions or judgement required 40% to 60% automation possible

RPA

Judgement Based

- Learns exception handling
- Complex processes
- Flags non routine or fraudulent transactions
- 10% to 15% additional automation possible

Cognitive RPA

Analytical Based

- Handles unstructured data from multiple sources
- Interacts with customers on chats and solves repetitive issues
- Predictive capabilities
- 10% automation

Chat BOTS/ML

AI Based

- Self learning and cognitive abilities
- Automatic detection and resolution of errors
- Applied in Financial markets for critical decisions
- Perform self analysis and makes decisions

AI

However there are inevitably some barriers to machine learning and artificial intelligence adoption as seen in the below diagram

Staffing: Hiring the right talent

Lack of technology capabilities (Big data, Analytics etc..)

Compliance & security concerns for adoption

Lack of executable business cases in a Shared Services environment

**Lack of ML / AI understanding and cultural resistance**

RPA NORTH ASIA

RPA is evolving in leaps and bounds but it is important for organisations to build strong foundations in their preparation work for it to be successful. This means a lot of pre work on vision, strategy and the workforce before they get to what technology to use. It's worth it to invest in understanding the concepts before you apply the tools.

Many early adopters in North Asia face challenges in getting started; from selecting the right processes, vendor selection to defining appropriate operating and governance models. Advanced players whoare interested to roll out RPA on an enterprise-wide scale are also uncertain on the best deployment strategy.

Building on the two exponentially successful RPA Summits in Singapore in 2017, we have rolled out the RPA North Asia Summit to examine RPA's transformational impact to improve service delivery, enhance productivity and reduce costs, across Greater China, South Korea and Japan. Come join us to share best practices and learn more from industry leaders.

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NORTH ASIA
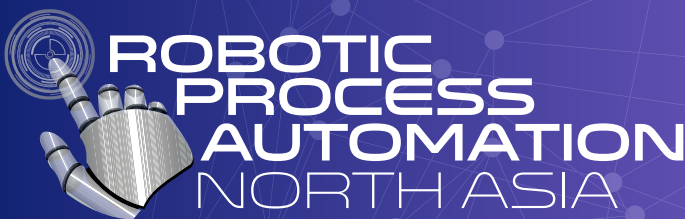
EFFICIENCY GAIN, COST REDUCTION
AND CUSTOMER SATISFACTION
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TRANSFORMATION
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