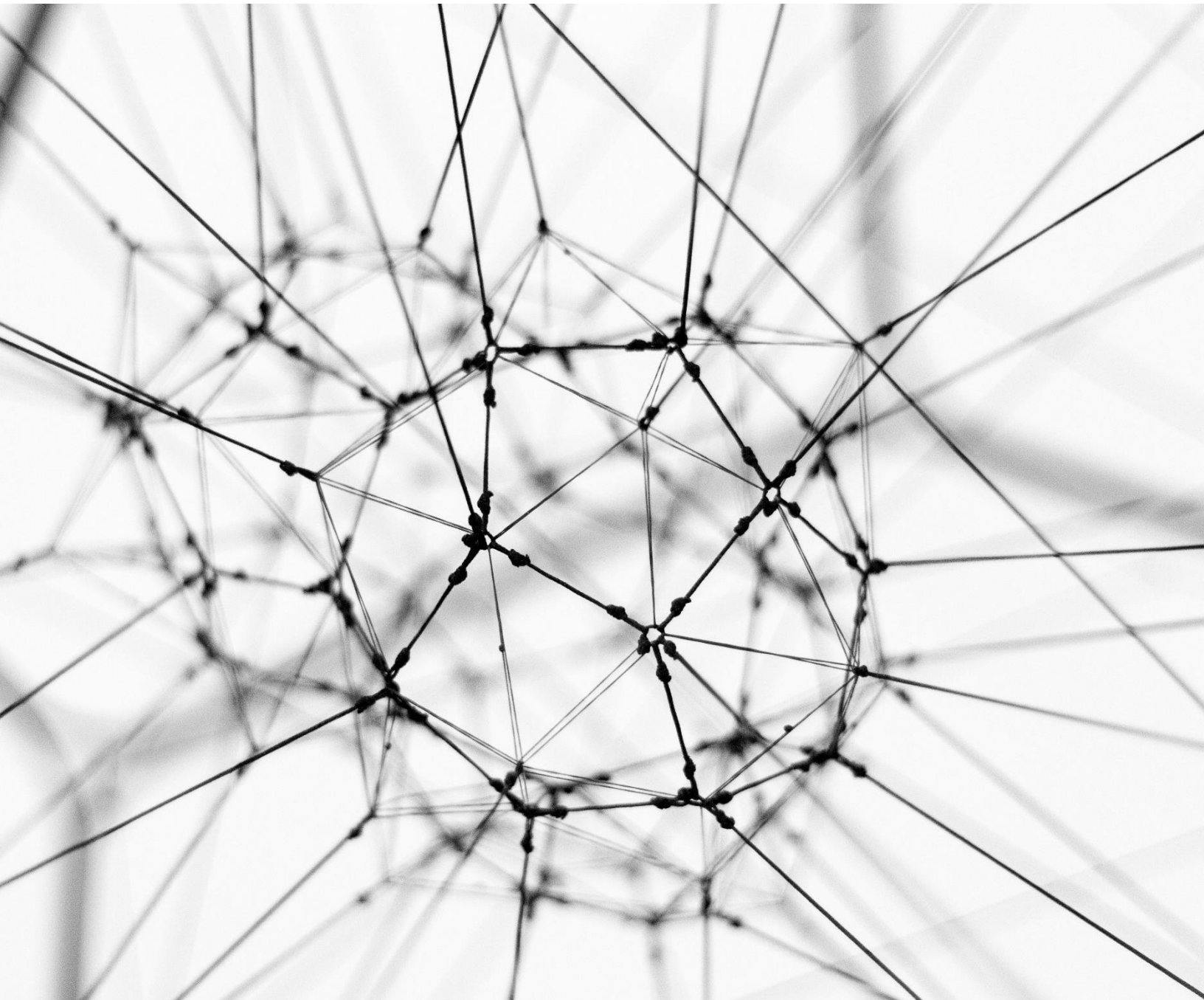




Smart Robotic Process Automation



Getting started with RPA

SmartRPA | 2017

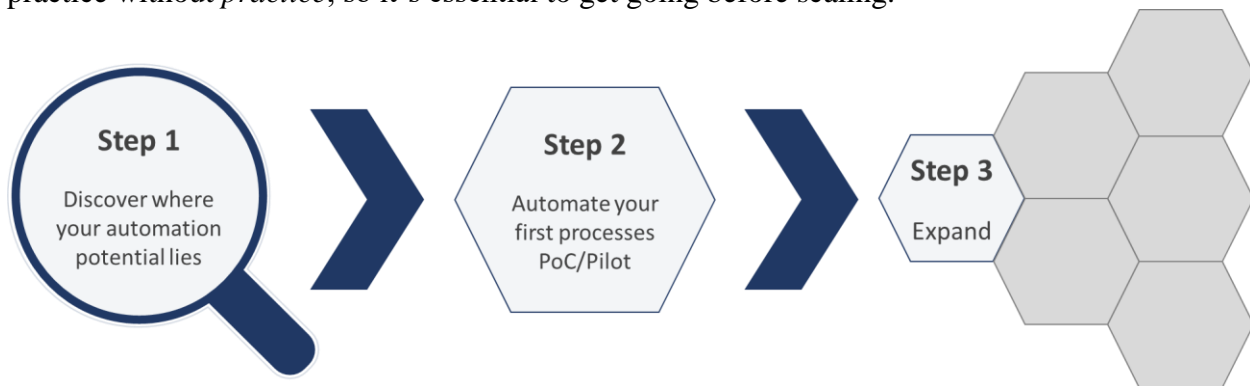
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Getting started

Despite RPA greatly simplifying the automation processes compared to coding workflows or requesting APIs, the journey towards automating processes through robots has many steps and potential pitfalls. The bright side is that as RPA is maturing, we've seen the good and the bad – even the ugly – and we're here to help you avoid the latter two

Steps in your RPA journey

To ensure a good return on investment and added agility to your organization, it's important to have an idea of the game-plan before jumping in. At the same time, it's hard to get to best practice without *practice*, so it's essential to get going before scaling.



In this whitepaper, we detail the first steps on your RPA journey. These involve understanding where the potential for automation in your organization lies, taking the decision of where to start out automating, getting started, and finally expanding and scaling your RPA capability.

Step 1: Understand where the potential lies

We hold the belief that any business has processes ripe for automation, be it the insurance company's claims handling, the bank's payment processing exceptions, the logistics company's fleet tracking or the hospital's handling of requests for patient journals.

Because organizations differ in the systems they use, their processes, organizational departments, and their ways of working, there is no plug-and-play solution for RPA. The start to adopting RPA in any organization should be to get an understanding of where and how the technology can be used.

We have developed a model, where we over the course of two weeks can pinpoint where and with which systems RPA is best suited in your organization. At the same time, we can help you estimate the business case for your organization – as a rule of thumb, if you employ more than 100 knowledge workers, RPA will have a positive ROI. If you employ fewer, the business case should guide your decision of whether to invest in the technology or not.

Which processes are suitable?

The first task on the journey to gaining success with RPA is to understand which processes to work with. We recommend starting out with a backlog of process candidates, that can be sorted and rated further to funnel out the best processes for automation. While there are many additional parameters to look at, we recommend the follow three points as a simple rule of thumb to evaluate processes to be entered into the backlog by:

Rule Based

A process must be described in business logic – a robot has a terribly hard time with gut feelings and intuition. Typically, rules can be formulated to remove the “fuzzy” logic behind these steps, but this will obviously take time. Aim for processes where these rules are easiest to formulate first.

Repetitive

The process should also be performed many times in the same manner. It could be a report that is made every afternoon, or it could be a one-off process of clearing a backlog of cases that have not been handled.

Digital

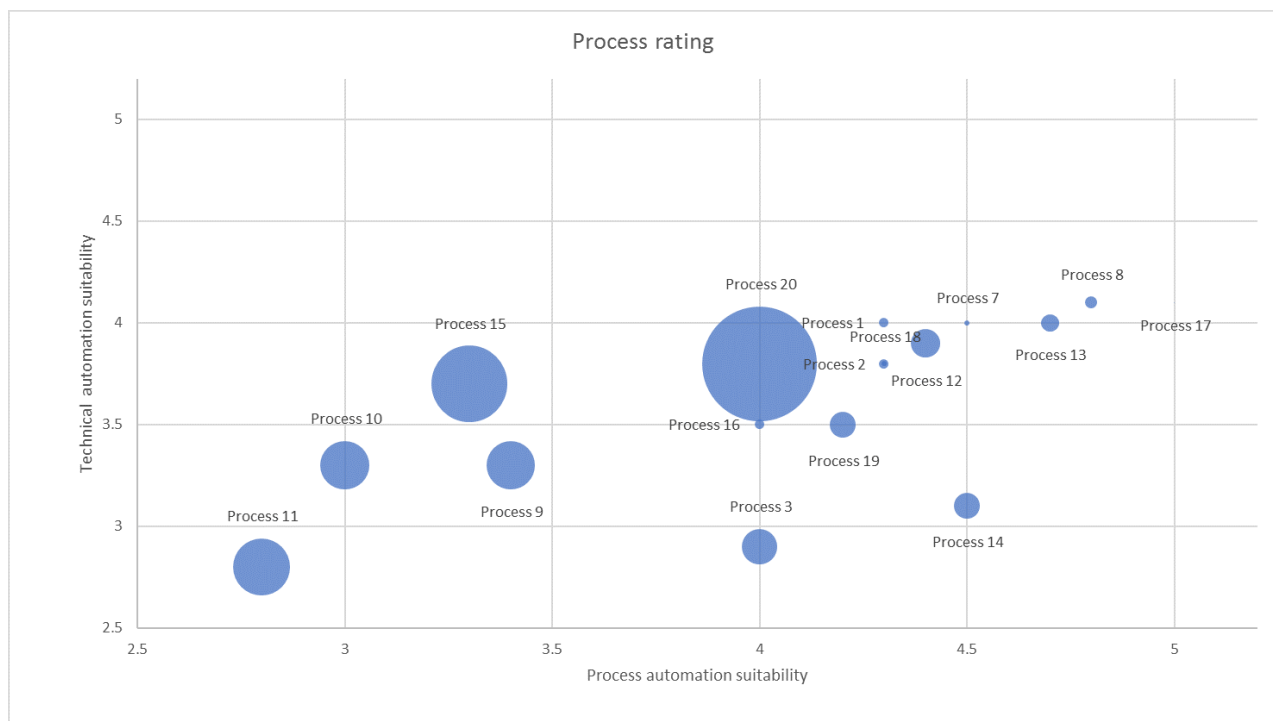
Because robots can't directly interact with anything that's not digital, involving e.g. printing a report and handing it to someone becomes an insurmountable problem. In this case you should either skip the process or digitize it - a robot can easily e-mail results to the recipient, rather than printing.

How we do it

SmartRPA has developed a set of tools for the identification of processes (often called the *discovery* phase), which enables us to quickly gather and display information regarding systems, processes and the suitability of both for RPA. This is done by interviewing the people performing the processes to understand the process in more depth, and testing the suitability of the RPA tool for automating on the underlying systems.

Once a backlog of processes with corresponding ratings has been made, our framework allows for a simple method of evaluating and comparing processes based on:

- Suitability of the process for automation (x-axis)
- Suitability of the underlying systems for automation (y-axis)
- The expected value of automation (size of bubble)



What you get

- Map of process candidates
- Repository of system and process ratings based on a variety of parameters
- Prioritized list of candidates for automation
- Framework to continue identifying more processes – and easily adjust ratings of existing
- Mapping between systems and processes

Step 2: Get started!

Once the potential is identified and a preliminary prioritization of processes has been made, it's time to get going. Rather than planning grand schemes and huge scale, start small and *learn*. It's easier and much less expensive to learn the fundamentals first and then scale, than it is to have started at scale and then figure out what you should have done.

Basically, the goal of the first 6-8 weeks should be to set up the team, establish the governance format, and automate the first few processes. If you don't have experienced RPA developers available in your organization, it's highly recommended to get external help for this period – typically referred to as a pilot project – to establish your RPA capability.

What to focus on

When starting out, there are three primary areas that will be critical to the future of your journey.

- 1 Getting a deep understanding of the processes that make up the flow of work in your organization or department that the team is working within
- 2 Establishing methods and best practices for automation on your organization's systems to enable streamlining of robots – this significantly reduces both development time and maintenance
- 3 Learning to navigate the organization in terms of who to ask to get access to systems and applications – and who to involve in the development process

Set the team

When setting the initial team, it's important to staff for the roles of team leader, analyst, and developer. These are the core team roles, which we recommend as a starting point. Do note that depending on the size of your organization and the planned scale of your RPA capability, these roles may be filled by anywhere from 1-5 people. We have seen successful initiatives with just one or two employees in the beginning – typically expanded with more employees, once the value realization begins.

Later on, testers, RPA evangelists, project leaders etc. may be added to the roster. To start off, focus on bringing in staff or consultants that will later be able to share what they learn with the team as it expands.

Team leader

The team leader is responsible for handling and prioritizing the day-to-day tasks of the team, including when to work on which robots. Further, this includes planning and executing the roadmap for development of the more complex robots, where dependencies could likely become a bottleneck. Examples of this are securing test data, planning test- and sign-off dates, and preparing the roll-out phase.

In the beginning, where the team is smaller, the team leader often performs this role alongside analyst or development work.

Analyst

The analyst's work consists of serving the right work to the developers. At first, the role is primarily focused on discovering, analyzing, prioritizing, and documenting processes, which are then passed on to the developers for automation. Later, when the first robots have been developed, the role evolves into examining the value of upgrading robots to handle a larger share of the process outcomes, fix potential errors or alter the process around the automation to improve the overall solution.

This means that the analyst should have skills within processes and process transformation, and be capable of data-driven analysis of the potential in new robots as well as tweaking or upgrading the existing ones. Finally, the analyst should be able to boil down the analyses to easily understandable recommendations for the steering committee, so that they may take informed decisions on the direction to go.

Developer

The developer is the one actually digitizing processes based on the process diagrams and documentation delivered from the analyst. Much of the work lies in figuring out how the robot best performs tasks in various systems, and implementing standardized modules based on best-practice, which can be reused across multiple robots.

In many cases, the developer (sometimes with the help of an analyst) will need to design the logic required for a robot to do tasks that may seem simple to a human. An example of this could be “just look through this list in your browser to find the customer – he’s probably on one of the first three pages”. Here, the developer would need to build the logic to loop through each row, figure out when there are no more rows, then click the “next page” button and repeat until found. But what if the customer isn’t found on any of the pages? Is that a system error from the webpage not loading properly, an input error in the customer name, an error in the list, or an employee who forgot to enter the data entirely – and what do we do about it?

A large part of the developer's work lies in finding the outlier cases, where an unexpected state would otherwise cause the robot to fail, and build error-handling around these cases. In short, creativity is one of the biggest assets of an RPA developer.

Who decides?

Outside of the core team who will be developing the actual robots, it's important for the team to have a proper governance structure. The structure should be in place primarily to help the team navigate the organization and get the necessary steering in terms of where to focus their efforts, who the key gatekeepers in the organization are, and finally to align the RPA efforts with the overall business strategy.

A governance structure is typically layered with a steering committee who can make the required decisions and know who to reach out to in the organization – this group acts like the board of a company, by setting the direction and goals for the team.

Furthermore, there should be a group to decide the technical ways of working when questions arise from the developers. The people joining these groups differ based on your organization and scope for RPA. The essential part is that the members of these groups are able to help and guide the team.

Start automating

Once the initial stakeholders have been identified, it's time to start working on automating processes.

At this stage, there's a prioritized list of processes, where the systems used for each has undergone checks for compatibility. The next step is to gain a deep understanding of the steps involved in the prioritized processes. The goal is to document the process at a click-by-click level along with the overall process flow to gain an understanding of both where to click, but also the purpose of each click.

Once the first few processes have been documented at this granularity, it's time to start building robots. The process for building robots is very cyclical in nature – you'll want to work with frequent check-ups on the progress with process SMEs, who can verify that the robot is indeed performing the process in the correct way. Further, one of the hardest things to get right when building robots for the first time, is to identify and handle the exceptions that may arise when the robot runs.

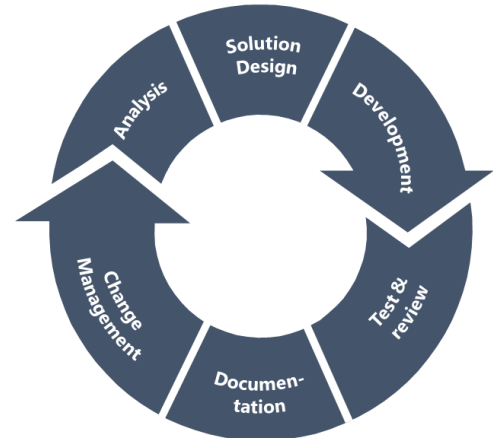
Rolling out the robots

Once the robots have been built, it's time to put them to use. Building a framework for the execution and maintenance of robots is the next challenge awaiting. This includes

- Hypercare for the robots, fixing potential errors in the initial production
- Scheduling robots
- Documenting the robots to enable support and future maintenance
- Change management in the organization – ensuring that the robots are used correctly

How we do it

SmartRPA typically calls this phase the Pilot – within 6-8 weeks, we automate 1-3 processes and put the robots doing the work into production. During the period we're involved in this phase of the project, our primary task is to build a platform for your organization, including the structures and best practices that enable you to continue your successful journey after we leave. In order to get you going as quickly as possible, the pilot cuts to the core of building robots, rather than scaling the organization. The structures and workflows focused on in this stage are summed up in the following six points:



Analysis

Creating detailed process diagrams for the entire process, supported by a click-by-click view of the process being performed in PowerPoint. We bring the templates and teach you the best practice in process analysis for RPA.

Solution design

Designing a solution for automation – this typically entails some degree of process transformation along with setting up a model for how the robot can perform the process. We set the standards and design the building blocks for a variety of actions (i.e. logging into systems, extracting data, logging) that help you to build the next robots.

Development

The actual development of the robot is performed by one or more experienced RPA developers, who know the inner workings of the RPA tool. Each robot is built with a focus on robustness, future maintainability, and reusability.

Test & review

Testing during development is integral to the way we build robots. We ensure that every robot is thoroughly reviewed by a process SME or owner, which gives inputs both during and after the development phase – in this way, the amount of errors in production are minimized.

Documentation

We thoroughly document all robots we build on both an overview level, and a very detailed click-by-click level, so that they are easy for you to maintain once our project is over. Further, we bring the templates for documentation – and adapt them to your organization's needs.

Change Management

Throughout the process of building robots, we make sure to involve the business in our work. This is both to demystify what a robot is and what they'll mean for the employees, and to ensure that the business embraces and uses the robots. This is done by showcasing the robots to the department and creating a how-to guide in the use of the robot.

What you get

- 1-3 robots running in production
- A technical foundation to build on
- Best practices for automation on your systems
- Documentation templates
- Enablement of your RPA team

Step 3: Expand

The next stage of your journey is to scale your RPA capability while ensuring quality, control, maintainability, and support of your robotic automations. This stage involves building an operating model and structuring your RPA capability to the best possible fit for your organization.

Contact us for more information on how to best scale RPA in your organization.

About SmartRPA

SmartRPA is your end-to-end partner for RPA. We work primarily with the SmartRPA Kapow solution, which is an extension of the Kofax Kapow suite of software. Our goal is to enable enterprise customers to become successful with RPA, which we do with our consultant team and local support, and by adding additional solutions to the Kofax Kapow platform.

Stefan Andreasen, who founded Kapow in 1997, is the founder of SmartRPA. He brings an extensive knowledge of RPA and the Kofax Kapow platform.

SmartRPA is a leading Kofax Platinum Partner, and hold the record for most implementations of the Kofax Kapow platform in EMEA, which have been performed by our team of Kofax Kapow specialists. We currently have the largest team of senior consultants focused on the platform in EMEA.

Our organization is structured in three departments, each bringing value to you in different ways:

Internal development

Our internal developers work on building solutions to complement Kofax Kapow in an enterprise setting. Heading up this team is our CTO Klaus Grønbæk, who was a Senior Principal Software Engineer at Kofax Kapow for six years.

Consultants

Our consultants work with Kofax Kapow and the SmartRPA solutions at a wide range of our customers. Our focus is to quickly enable your to become self-sufficient, while bringing positive ROI to any project we engage in.

Support

Our support is located in our offices in Hørsholm, ensuring you support in your native Nordic language. All of our support team also serve as consultants, ensuring that the support you get is based on actual experience, not theoretical solutions.

Contact us
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