Success with Robotic Process Automation

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1. INTRODUCTION

1.1. **What is Robotic Process Automation (RPA)?**

Robotic Process Automation (RPA), is the activity of translating task(s) within a business process that are carried out manually by a human into an automated workflow that can either operate with complete autonomy based on defined rules, or with some interaction from users. Most of the time this does not necessarily mean implementing physical robots as the title suggests, but simply software-based scripts that can run to manage the exchange of data or communications between various applications or individuals, and to carry out activities.

1.2. **History**

Concepts relating to RPA have actually been around for many years, such as “Machine Learning” where computers began to recognize repetitive patterns, coined by IBM in the late 1950s, and “screen-scraping” which appeared in the 90s helping calculations to be made based on banking data.

But also in the 90s RPA technology became available in home PC applications such as Microsoft Excel in the format of “macros” followed by “Apple Script” and “Automator” software available on Apple Macs. This meant that home users could automate certain activities within applications or with certain software, increasing the speed of performing basic tasks.

But it wasn’t until the early 2000s businesses were formed that could provide a packaged automation solution through specific RPA software that could do this between any application, pulling everything together in a dedicated platform monitoring patterns and providing data on automation transaction performance:
- Blue Prism
- Automation Anywhere
- and UiPath

It then took until the second millenial decade for RPA to really enter into the mainstream with large organizations beginning to invest in big process improvement and automation programs to help with their strive towards achieving “operational excellence” and to form an essential part of their continuous improvement strategies.

1.3. **How is RPA different to scripting?**

Put in its simplest form here, there are many different formats of scripting that require developers with specific knowledge of the different coding languages that will only work with certain mainstream applications, meaning you are restricted in where you can apply automation successfully without creating monster scripts and sometimes having to overcome some significant complexities.

With RPA, you are moving away from traditional coding to work with a platform that allows you to program specific business rules around workflows for running processes with literally any application (without having to work with different coding languages), and you are able to monitor your automations all from the same platform. You do not have this ability with
scripting tools.

1.4. **How can it benefit an organization?**

There are many benefits that can quickly be realized through the automation of processes which can excite operations managers such as:

- Faster transaction processing time (robots can deliver 24x7 and faster than humans)
- Greater processing accuracy
- More advanced (and automated) process reporting statistics
- Increased compliance (detailed audit trails)
- Enabler to reducing expensive human resources on repetitive, manual processes
- Enabler to redeploying human resource onto more “value-add” activities within the business that help drive growth

1.5. **Fears and concerns surrounding RPA**

**Your Workforce**
- An RPA program can unsettle the workforce if they feel their roles are threatened, or they may have concerns working with what are essentially robotic colleagues in the future
  - a good change management and communications plan is essential to mitigate this

**System Failure**
- If RPA is being used to automate high-profile processes that are business critical, there will be great fear of the automations failing
  - considerable thought needs to be given to the processes that are being automated (are they the right fit for automation), and a robust service and support model must be established

**Interaction with Customers/ Clients & Suppliers**
- Will your Customers/ Clients & Suppliers have to interact with your automations? If so, what will their experience be working with your virtual workforce - what about system failure?
  - the experience/journey of interaction with your external parties needs to be considered, and much like your internal workforce, they will need to be included in your change management and communications approach for the program
2. THE KEY TO A SUCCESSFUL RPA IMPLEMENTATION

2.1. Business case

RPA does not always make sense to implement. Business leaders can get very excited at the benefits of RPA, but you need to partner up with an organization that understands what is viable for automation and what is a waste of time and money; potentially not providing you the return on investment or even exposing your business to increased risk.

Implementing robotic process automation can still have a significant cost to it, for example you need to:
1. Partner with a team, usually a consultancy that can be expensive in the short-term
2. Purchase robotic assets on an annual license subscription
3. Factor in the cost of the support model involved with running and maintaining the robots
4. Other licensing costs – the robots will need licenses for applications they are interacting with

You also need to think about what your organization is trying to achieve, have your transaction volumes increased and you need a more cost efficient solution to process, have you been repeatedly highlighted for non-compliance with risk of fines, do you need your existing team to carry out different tasks that could help generate more business? There are many additional benefits that RPA can help your business with which will all need to be considered when building the business case and determining the return on investment for you.

2.2. Capture, evaluate and improve your existing processes

Processes that are a good candidate for automation are manual, repetitive tasks which could be prone to human error and tasks that a robot could clearly perform faster than a human or tasks that can be performed at any time of day or night.
In our experience these usually sit in administrative parts of a business, in sales, accounting, insurance, data processing etc but you’d be surprised what can be automated!

However, not all processes are a good candidate for automation and this is why it is absolutely critical that your business process owners/SMEs and individuals experienced in automation guide you through the process assessing your workflows as to whether or not they will be viable for RPA.

Some reasons why a process may not be fit for automation:
1. It is open to processing variation (multiple ways in which tasks get completed)
2. There are too many hand-offs between systems or people
3. Elements of the process are Client-facing (depending on the process this may be a significant risk that you do not want to embark upon)

But, something that we have seen constantly are businesses capturing their as-is processes and trying to build automation around these existing, usually underperforming processes or elements of them.
This is basically setting yourself up to fail.
Most of the time these processes are broken and all it takes is a workshop mapping session to get all key stakeholders together to determine and agree a more streamlined “to-be” process, factoring in what can and can’t be automated with the relevant expertise.
2.3. **Documentation**

Good quality, consistent documentation is absolutely essential for capturing existing processes, determining to-be processes with automation factored in and the detailed solution design of your automation. If this is not captured appropriately, your business is going to have great challenges:

1. Understanding and adopting the changes being implemented.
2. Supporting and maintaining the robots.
3. Changing / updating the robots when the time comes.

Using business process mapping tools such as ARIS, Signavio or Skore can really help when mapping in workshops, analysing waste in process and identifying where automation can be applied. Some of the software mentioned above can even recommend what parts of a process are suitable for RPA and rate the level of difficulty in the automation application.

2.4. **Implement development governance**

The Agile project management methodology can work well when coordinating the end-to-end development of robotic process automation. Agile emphasizes the importance of business process owners being part of the solution design team and working as part of the project team experiencing their RPA solution as it evolves and having the opportunity to feedback on their robot tweaking it to meet their requirements.

Implementing clear governance stages such as the below, will help ensure you meet your timeframes and encourage consistency:

- **Process & Solution Design**
- **Development**
- **Test**
- **UAT**
- **Production**
- **Early Life Support**

Aligning various governance checkpoints between the above stages will ensure acceptance criteria is met before progressing to the next stage and whoever is leading the implementation in its entirety can organize the project effectively, providing the Senior Leadership Team / program sponsorship with the required status updates on their investment.

2.5. **Change management approach**

Thought must be given to the impact of business process automation changes on your workforce. It could mean some people are put out of a job, there may be some real challenges having to work with the robots once implemented, but ultimately people are afraid of change. The potential impact on your workforce should not be underestimated.

However, it needn’t be a negative impact as RPA can help transform a business and improve job satisfaction for employees by enabling progression into more value-add positions.

**So, what are the best ways to manage this kind of change?**

Our key recommendations are:

- Be upfront with your workforce early on to gain their cooperation.
• Involve your business process owners in the project from the beginning, after all they understand your business operations the best.
• After the process analysis and design stage, carry out a change impact assessment to fully determine how the business will be impacted by the changes you are making and implement a plan to mitigate these impacts.
• Determine a change and communications management plan.
• Promote a business RPA lead who can own the change management and communication activities associated with the RPA program.

2.6. Support model

Like other software, robots also need supporting!
They will fail, they will sometimes do things incorrectly, they will need updating and they will need changing or disabling at times.
It is critical that you implement a support model for your RPA investment otherwise it could end up causing chaos.
There are of course some basic “fail-safes” that you can implement if a robot was to fail based on predicted issues. For example, if an expected input file was not provided by a certain date then the robot could be programmed to chase up the individual/company that is due to provide it. And, exception reports can be produced and sent to someone in the business to follow up on any issues the robot has encountered during its processing.

But these will not be able to:
- Understand and manage the impact of a piece of software upgrading meaning certain file types may not work between the applications that a robot is using.
- Determine and manage the impact of your IT department upgrading all the servers that your robots sit on.

And there will be many, many other similar scenarios that occur and are not documented here!

Therefore, our support model recommendations:

• Setup a clear support process following ITIL Service Management guidance where users can log tickets to relevant teams to take action.
• Ensure you turn on audit log reporting for your robots so you can track back if an issue occurs to understand what has happened / what the root cause of the problem was.
• Align closely with your IT department if the program is being led by the business line; ensure the IT department provide a contact for RPA-related activities where the project will overlap into their infrastructure world.
• Take a proactive approach implementing a continuous service improvement model to refine robot performance.

2.7. Establish a Centre of Excellence (CoE)

Best practice suggests the idea of a setting up a “centre of excellence” that can own the continuous improvement of processes and the robotic automations that you have implemented. This is more than a support team, this is a team that can monitor the utilization of your robots to ensure you are getting the most out of your robot asset licenses. They will monitor performance (speed) and investigate potential issues/concerns.
They will be the go-to for business process owners that have ideas for automation within their functions, they can evaluate the suggestions and lead them through a governance approach they
have established to ensure consistency is applied to building robots going forwards. They will also manage any changes to existing robots required and ensure members of the business that take an interest in RPA development and want to become a “Citizen Developer” is onboarded and managed appropriately. Citizen Developers can be the epitomy of operational excellence and key to enabling a successful continuous improvement culture if governed correctly.

3. PROGRESSING INTO THE WORLD OF ARTIFICIAL INTELLIGENCE & HYPERAUTOMATION

Before even considering progressing to an artificial intelligence implementation, our recommendation would be to get the basics of RPA right first. You have to establish a good, stable foundation that is performing at an acceptable level before machine learning can be implemented where your automations can become intelligent; begin to start spotting patterns and take various actions on these patterns. Naturally if you have used the right tools to build your robotic process automations, you should be able to easily progress into this world using the functionality a provider such as UiPath can offer, and your Centre of Excellence will play a pivotal role in this area as it very much falls into the performance analytics and continuous improvement space.

4. CLOSING SUMMARY

The 4 key takeaways from this paper are as follows:

- **RPA won’t solve all of your problems and can be quite resource intensive to setup.** You need to put a fair amount of work into developing the business case for an RPA implementation to ensure the investment stands up. Working with a reputable partner who has experience in RPA is recommended.

- **If you operate bad or inefficient processes, RPA won’t improve them!** It may be a temporary plaster over some elements of a process, but it will not be the answer in the long-term. Review your processes and improve them where you can before introducing automation.

- **Ensure you implement the appropriate governance surrounding the analysis of your processes, development of your robots and support/maintenance post transition into production.**

- **Finally, don’t underestimate the attention you are going to have to give to change management-related activities to ensure you properly engage with and bring your workforce along on a successful journey.**
Who are LMX?
We are a small, hands on consulting practice based on the South Coast of the UK that are well equipped to provide consulting expertise to assist with business analysis, strategy and the delivery tranformation programs.
The founder Louis Maxwell holds a Master of Science in Project Management and has worked in his field for 16 years with many organizations of different sizes travelling the globe determining strategy and implementing process improvement and technology programs.

How can we help you?
LMX will root for the success of your business! We will get to know your operations, understand and input into your strategy with a fresh pair of eyes that have been privi to hundreds of strategies over the years. We will help you understand and overcome your business challenges through intensive business analysis with process mining and improvement activities. We can also stay on to deliver your change programs with complete control whilst thoroughly engaging your workforce.
Experienced in delivering technology that supports your internal and Client-facing operations, managing your data and business activites through improved workflow and automation systems.

Why work with LMX?
LMX will partner with you and integrate to become a key member of your team. We will get to know your business personally and engage with a passion as though it is our own, and the main reason we are able to do this due to our size.
Our size also allows us to be a very cost efficient option compared with competitors.
LMX have many years of experience in helping international companies of all sizes and across all sectors so have the experience to advise and help you with your transformation and continuous improvement journey to ultimately strive to achieve operational excellence.

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