

GETTING STARTED WITH
ROBOTIC PROCESS
AUTOMATION



A Practical Checklist

By: Smartbridge

To Realize the **PROMISE** of Automation with RPA, you **MUST**:

EMBRACE automation as a corporate strategy with sponsorship at the C-Suite

Today, every business is competing for shareholder investments with other businesses, like Google and Apple who may offer faster and higher returns. Businesses must transform themselves, and demonstrate their ability to grow top-line and reduce G&A costs. Robotic Process Automation (RPA) and Artificial Intelligence (AI), when adopted cleverly, will deliver the business outcomes desired.

Such vision and sponsorship should be driven from the top (C-Suite) to digitally transform the organization with automation. Establish a business-focused enterprise automation strategy and roadmap (EASR) that lays the groundwork for successful adoption and business-value creation for your organization. This strategy should highlight the opportunities for automation across the organization (the processes, people, and technology) required for establishing a sustained high performing RPA program to respond to business needs with agility.

 Integrate an EASR with **AGILITY**:

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EDUCATE leaders and set realistic expectations

Business processes are a set of rules that people execute to achieve desired outcomes. A collection of such rules when stitched together becomes an algorithm that can possibly be automated by a computer. RPA has the potential to make a significant impact on an organization, though it is not a panacea for solving all internal business problems.

As RPA bots simply perform the same processes as humans, gaps that cause revenue leakage will simply worsen due to its speed of execution and lower human checks. Sometimes, repetitive tasks are best addressed with a technical integration of the underlying systems. Stop your RPA projects from going off track, or failing to solve problems they were never capable of solving. An educated executive will be the best proponent of RPA for the right use cases, and will avoid wasting money on wrong ones.



We strongly recommend Smartbridge's Art of the Possible executive talks to educate your C-Suite, and set realistic expectations to gain their trust.

smartbridge.com/lectureseries



✓ **ESTABLISH** a clearly defined RPA-based automation strategy

Best practice methodologies from leading authorities, such as McKinsey, Gartner, and Accenture, will always focus on aligning the business strategy with people, process and technology aspects for success. If any of these are ignored, the strategy is likely to fail. Smartbridge's RPA strategy framework follows these best practices, and aligns these three essential elements with the business strategy.

We establish processes that blue-print how RPA uses will be identified, approved, automated and rolled out. Understand that what your people do will be impacted with the RPA enabled processes, define the new ways employees must work in the digitally enabled environment, and establish structures to make them knowledge workers. Define RPA technology standards, infrastructure, and implementation approaches.



*Disrupt yourself before
you are disrupted.*

- George Danner, Data Scientist & Author of
The Executive's How-To Guide to Automation



✓ **ASPIRE** for revenue generation and act on quick wins rapidly

Innovative companies will go further to increase cash flow and grow their top-line with RPA. The average employee spends significant time on repetitive tasks that are dreary and uninteresting. Automate such activities with RPA, which mimic the activity of the human being carrying out these tasks.

RPA bots do repetitive activities more quickly, accurately, and tirelessly than humans, working 24-7 to free up employees to focus on tasks requiring emotional intelligence, reasoning, judgment, and interaction. These higher-value activities will grow your top line, and your business can achieve the goals to please your investors. Companies must swing into action with RPA, establish a structure for success, and drive automation focusing on "low-hanging fruit" first. Celebrate successes and move onto higher value automation opportunities.



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industry professionals on the
TRANSFORM IT PODCAST

transformitpodcast.com



✓ IDENTIFY and qualify RPA-enabled revenue generation opportunities

Several use cases for automation can be found in marketing, sales and customer care functions. Marketing is collecting, processing and acting on customer-related data every day. Sales deal with customer interactions in a variety of ways that can be managed by auto-organizing and auto-response bots.

Customer care is responding to a variety of requests, which in some cases, can be replaced by automated self-service response bots. Often there are several manual processes in these functional areas that can be automated. Our Digital Transformation framework establishes that transforming the way companies engage with customers to maintain high levels of satisfaction can drive revenue.



✓ IDENTIFY and qualify RPA-enabled opportunities to automate wasteful activities

Four of the five target areas in our Digital Transformation Framework are operations, products and services, workforce, and vendor/partner ecosystem. These are internal process areas that companies must transform to realize the promise offered by digital transformation.

Companies will often find several manual activities that are being performed by hundreds of office workers that can be automated. Some common use cases that are ripe for automation are:

1. Master data maintenance across systems
2. Accounts receivable and payable
3. Financial closing and reporting
4. Procurement processes
5. HR employee master and benefit updates
6. Claims processing
7. Time entry and payroll validation



Learn more about RPA use cases through your implementation process:

smartbridge.com/implementrpa

✓ **START** with the non-intrusive approach on standardizing processes

Initial RPA implementations often focus on “low-hanging fruit” use cases. The most obvious and common use cases for deploying RPA bots are in business functions in which people perform data entry. This requires taking data from one system and entering it into another, to connect data across systems while also completing business processes.

We often find several such use cases in finance and human resources departments to begin a company’s RPA journey. Better functionality in these areas can also be achieved with a direct systems integration in some cases.

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Learn the need-to-knows of implementing RPA,
and turn CONCEPT into REALITY.



✓ **SCALE UP** RPA activity in a phased manner - POCs to pilots to full scale

While automation has been around for a long time, it was applied in select cases with tech-savvy programmers. RPA that is being discussed today is a topic surrounding digital transformation, enabled by the advent of special purpose RPA tools such as Ui/Path, Blue Prism, and Automation Anywhere.

As a result, standards and methodologies are evolving, skills are in short supply, and executives desire to automate everything in sight without full awareness. Smartbridge strongly recommends companies to start immediately, beginning with POCs to learn the ‘Art of the Possible’ with RPA, and execute pilots to introduce automation in a regulated manner before scaling up across the enterprise.

Due to RPA technology’s impact on the workforce, companies should establish a clear strategy for how the process executing workforce will be converted to a knowledge workforce.



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✓ DEFINE and implement a governance model

Regardless of its task, a robot's essential job is to make the company vision come true. To realize this vision, businesses should establish an internal, self-sustaining and scalable RPA expertise to build, run and maintain the robots. Businesses must treat RPA as an enterprise capability, and resist the temptation to make quick wins by implementing automation silos that only bring short-term benefits. It is important to define how automation fits into your organization, digital framework, and technology roadmap.



We'll help you implement an RPA CoE into your organization:

smartbridge.com/rpaexcellence

Implementing RPA should be treated as a corporate wide initiative, not a series of stand-alone projects that may or may not align with corporate goals and standards. RPA governance body and RPA Center of Excellence (CoE) are the mechanisms to embed RPA deeply into the organization, and redistribute knowledge across various business units and towards future RPA deployments.

✓ BUILD an implementation team with the right mix of expertise

We at Smartbridge, while working with companies exploring automation with RPA technologies, often find that the initial forays into RPA are made by tech-savvy business analysts, not IT. However, soon after building an initial prototype, they often find themselves at a dead-end, trying to figure out what they should do next to operationalize the prototype.

Automation initiatives should rightfully start in the business. However, a variety of skills such as project management, business process documentation and analysis, RPA tools, architecture, database technology, and VB scripting are required to successfully implement RPA bots.



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- Sri Raju
CEO, Smartbridge



✓ DEVELOP a solid plan to manage operational aspects of bots

Any business process, regardless of whether it is manual or automated, needs caring and feeding. They change as the business evolves in today's rapid transformation environment, exceptions occur frequently, and situations need to be addressed and managed.

Bots may unexpectedly stop running, unable to handle exceptions in this manner. Technical changes in underlying systems or software versions may also break the bots. Successful companies undergoing digital transformation proactively plan for these occurrences, and establish operational management mechanisms for their RPA bots in production. Our automation managed services monitor our customers bots, and execute processes to maintain high uptime availability of them.

✓ MARKET what RPA means to the organization

RPA creates tremendous opportunities to grow revenue and reduce G&A costs. These opportunities can only be realized if the executive leadership embraces automation, actively sponsors and supports this initiative, and effectively communicates with the workforce to allay fears and drive a transformative mindset. This transformation should start with a shift in the C-Suite area.

Ask your Smartbridge account director about our 'Art of the Possible' Executive Lecture Series talks on digital transformation topics, some of which your leaders must learn in order to transform your company.





Focused on Simplifying Business Transformation

We apply thought leadership and innovation to bring our customer's digital agenda to reality. We partner with customers in their journey from vision to adoption, and across the plethora of technology options available today.

Smartbridge's comprehensive list of technology and software partnerships gives us the freedom to remain an objective collaborator with our customers. The suite of Smartbridge services includes Digital Innovation, Systems Modernization, Applications Integration, Data Management, Business Intelligence & Analytics, Enterprise Mobility and Automation.

An empathetic approach to understanding customer challenges is bred into the Smartbridge culture. It is evidenced by our ability to bring ideation to life for customers and ourselves. As thought leaders with a track record of successful project execution, Smartbridge is committed to fueling your innovation.

Implement your digital agenda with RPA.

Contact us for a consultation.

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