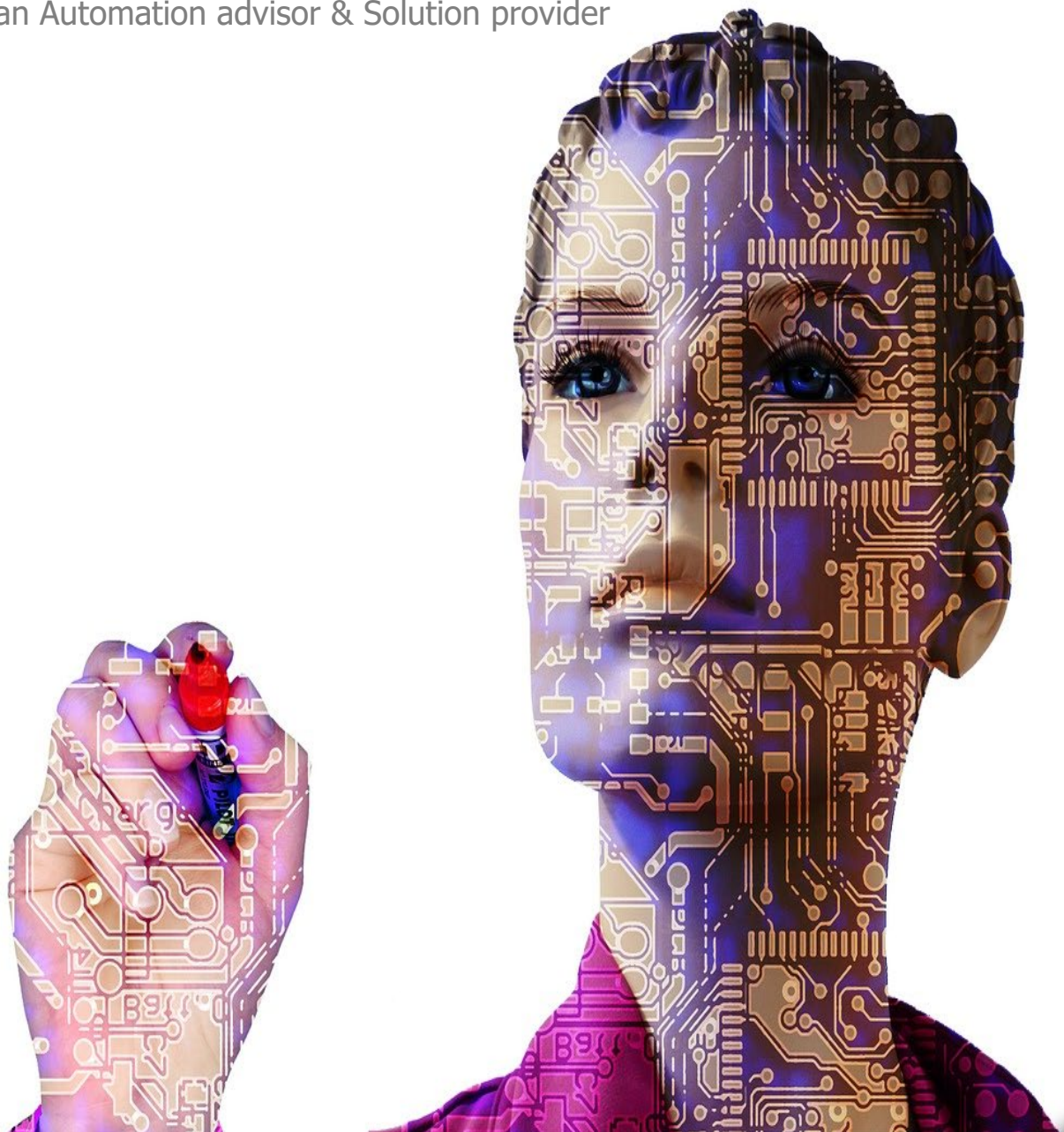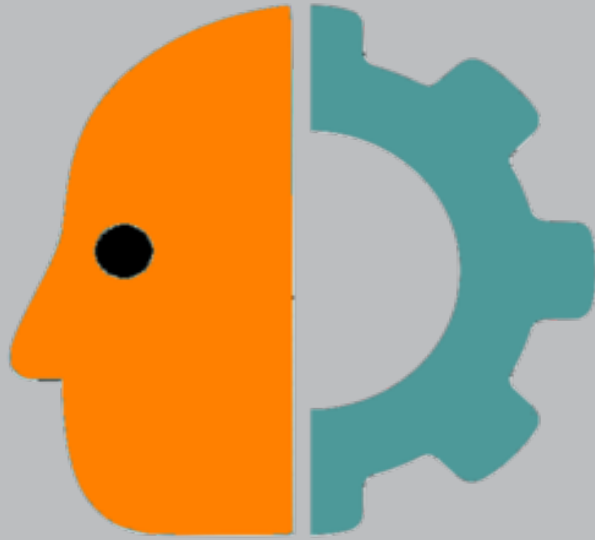# Robotic process automation (RPA)

Executive material

©Robotiqa – an Automation advisor & Solution provider
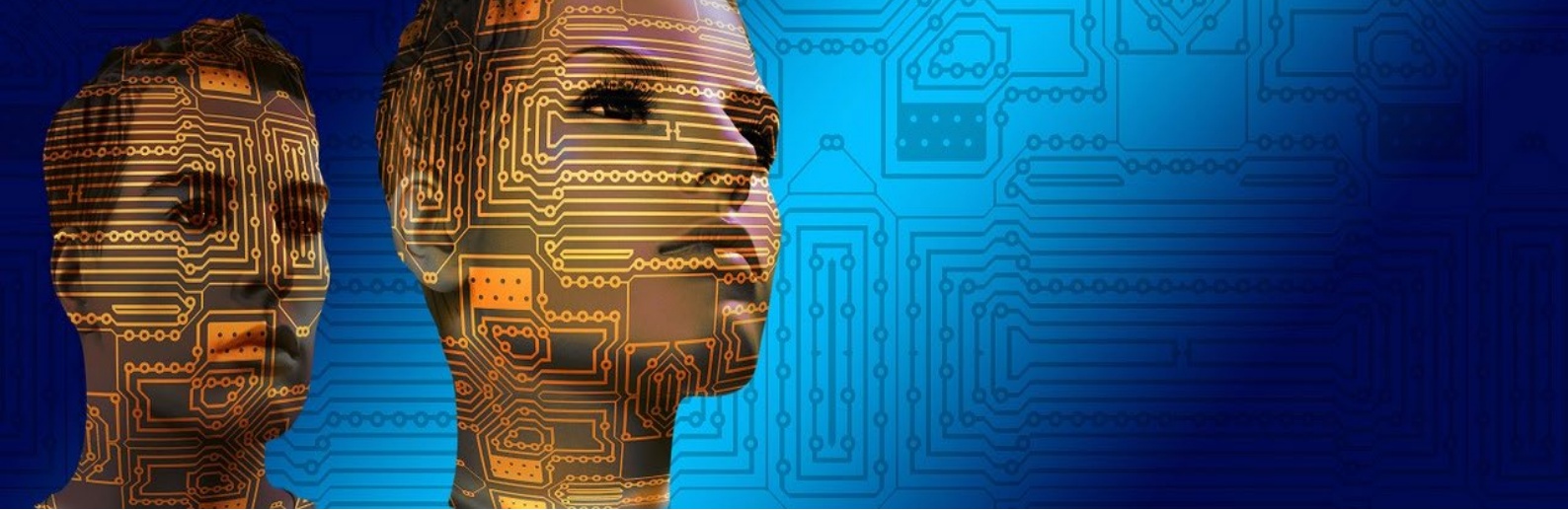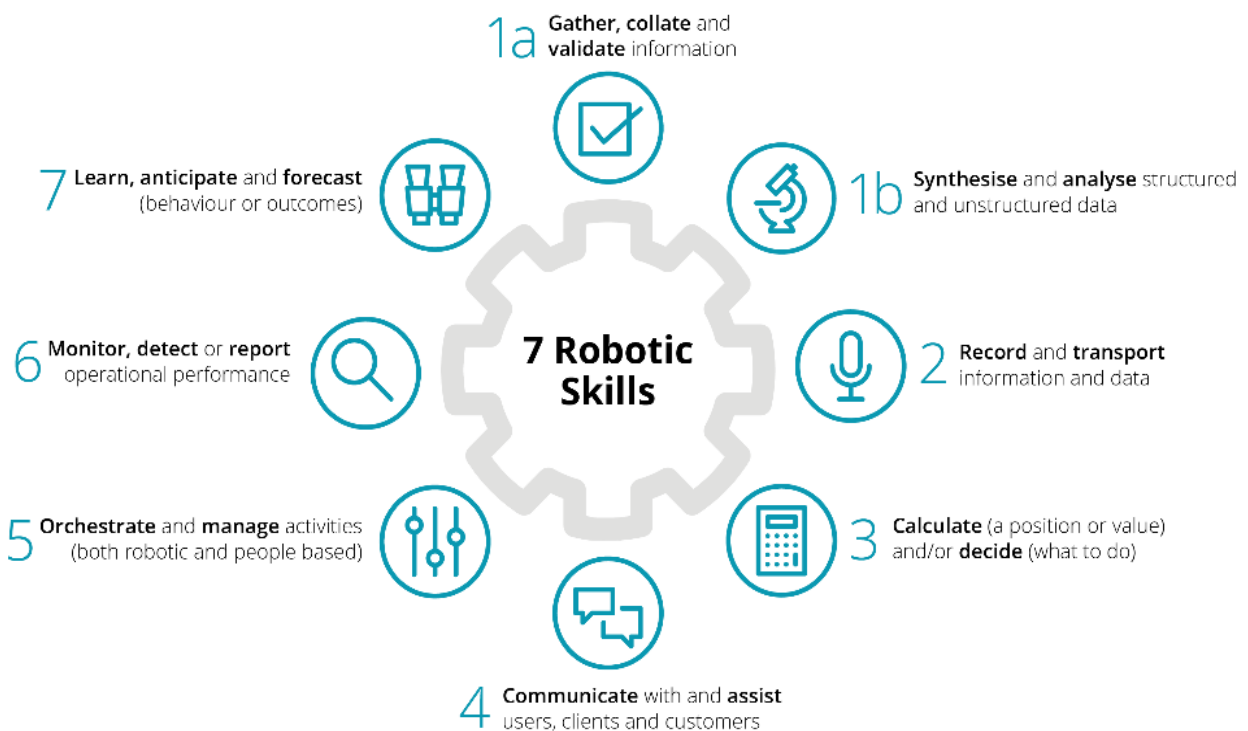
www.robotiqa.com

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1 Preface

Robotiqa Technologies

Established in 2017 in the western part of North America and headquartered in Vancouver British Columbia Canada, Robotiqa specializes in Robotic Process Automation (RPA) implementation.

Robotiqa RPA implementation Framework™

1a Gather, collate and validate information

1b Synthesise and analyse structured and unstructured data

2 Record and transport information and data

3 Calculate (a position or value) and/or decide (what to do)

4 Communicate with and assist users, clients and customers

5 Orchestrate and manage activities (both robotic and people based)

6 Monitor, detect or report operational performance

7 Learn, anticipate and forecast (behaviour or outcomes)

7 Robotic Skills

2 Executive summary

Advent of disruptive technologies have changed the way corporates operate. Although it may be obvious to some, it should be noted that RPA has nothing to do with physical machines or actual robots or any hardware part; it's an entirely virtual concept that is driven by software that sits on top of the organizations' existing processes, applications and infrastructure.

Easiest way to describe RPA is as software that mimics human tasks. These human tasks should typically be "rule-based" and require digital inputs for the RPA software to be effective.

RPA is an enterprise-class software automation solution that runs unattended, working like a virtual employee at the level of the user interface. It executes laborious, repetitive processes and handles data across legacy, desktop and servers.

In layman term – The RPA software intercepts the data entering in these systems and it tries to emulate the behavior of an actual user. It is as if someone is sitting in front of the PC. The RPA software can make decisions like the one made by a worker. For example, the system may decide what action to take based on an individual's credit score, may request missing information from the customer or use information from one system to update another – all within one workflow. Afterwards it can even go to next level of decision making based on available information and pre-determined business logic.

It should be noted that the RPA implementation is pure non-invasive effort. It normally does not try to change the existing software, logic, configuration or hardware. The cool thing about RPA is that the most RPA software are next generation intelligent programs, that can be easily configured, allowing business users to set up processes without the need for IT support. This allows RPA to be deployed quickly – often in just a few weeks. Many companies see a return on their RPA investment in only three months.
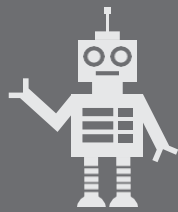
Low risk
Non-invasive technology

RPA can be overlaid on existing systems, allowing creation of a platform compatible with ongoing developments in sophisticated algorithms and machine–learning tools.

Accuracy
Always gets the right result and right calculation

Consistency
Identical processes and tasks, eliminating output variations

Productivity
Freed-up human resources for higher value-added tasks

Cross–industry
RPA can be used across industries since it follows procedures in use

Reliability
No sick days; services are provided 365 days a year

Right shoring
Geographical independence without business case impact
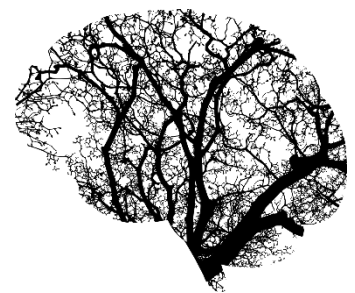
Retention
Shifts toward more stimulating tasks

Scalability
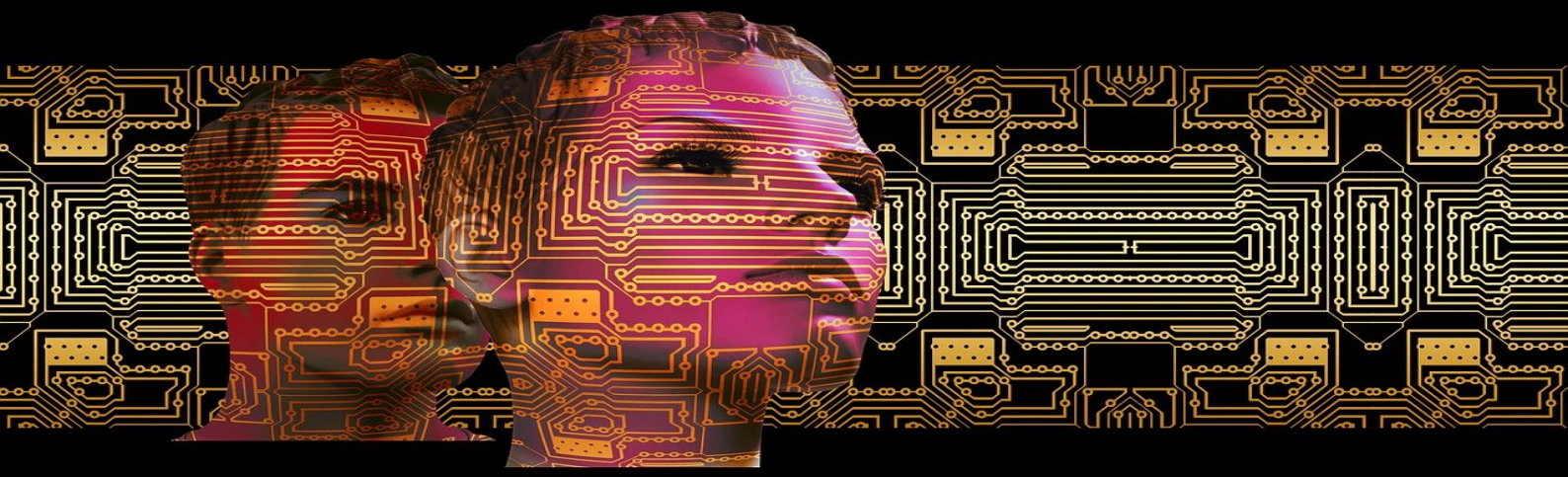Instant ramp-up or ramp-down to match demand peaks and troughs

Duration
RPA projects run 9 to 12 months with a return of investment below 1 year

3   A question of survival

Robotic Process Automation (RPA) is the next wave of efficiency and cost savings available for organizations. Recent McKinsey study[1] estimates that one who lags in RPA implementations will be wiped out by their RPA centric competitors in 2-3 years' time.

RPA has emerged as the most effective entry point that will drive organizations toward sustainable profits. In fact, some major organizations have already commenced their Robotic journey and are moving toward advanced adoption that will allow them to establish a market-leading position, by realizing accelerated benefits and by providing competitive advantage.

With RPA, there are no sick days, and the services can be made available 24 hours a day, 365 days a year.

Cost rationalization

Further cost reduction
Extremely high ratio of success combined with visible ROI

Time reduction
Cost benefits of RPA implementation is quick to realize

Non-intrusive

No impact to Systems
Interestingly RPA implementation does not impact any of the existing systems

Business Driven
Unlike traditional applications, RPA gives keys to businesses for any change. No IT support needed

4 RPA is highly Disruptive

RPA is extremely disruptive because it combines quick implementation with visible and tangible benefits. Further, its non-invasive nature ensures that RPA can be easily superimposed over existing applications. On the process side, it changes the support baton. Unlike traditional system setup, baton will be with the business, not the IT support personnel.

Below is the real example taken from an RPA implantation with a bank in North America. (Data from EY[2])

Benefits	Example	KPI before RPA	KPI after RPA
Time advantage (Improved customer satisfaction)	Time to open account and onboarding new customers	>16 days	<6 hours
Cost advantage	Elapsed time/month to prepare 10 reports	1.8 FTE	0.2 FTE
Governance, quality control and audit	Time to reimburse the payment of a claim to a customer	19 days	8 hours
Strategic program cost reduction	Time to value the process to migrate data from legacy systems	Months/years	Days/weeks
Employment	Creation of digital workforce	Provides serious opportunity to reclaim off-shored activities.	
Revenue enhancements	Accelerate innovation and growth	Product and service innovation can be accelerated. Rapid creation and piloting without expensive legacy system upgrades	

Processes that work best with RPA

Processes that are most effective with RPA have these 4 characteristics:

- Activity is repeated consistently
- Rule based Processes
- High usage of template for data entry or reporting, e.g. Tables, Excel and PDF
- Work involves working with multiple systems/screens at the same time

Examples of processes that fall into above mentioned categories

Finance	Supply chain
Transactional processing	Order management
Account audit requests	Materials requirements planning system
Foreign account payments	Consumption and procurement
Account closure and opening	Payment protection measures

People management	IT
On-boarding and off-boarding procedures	Password resetting
Job role changes	System maintenance
Amendment of address details	Data cleansing
Fraud investigation and time management	Data analytics

5   Robotiqa Framework for RPA™

Robotiqa advantage – implementing a Robotics Strategy

Our scope will focus on proving the value of RPA in Acleda's environment, while documenting lessons learned and best practices to help sustain momentum and rapidly scale

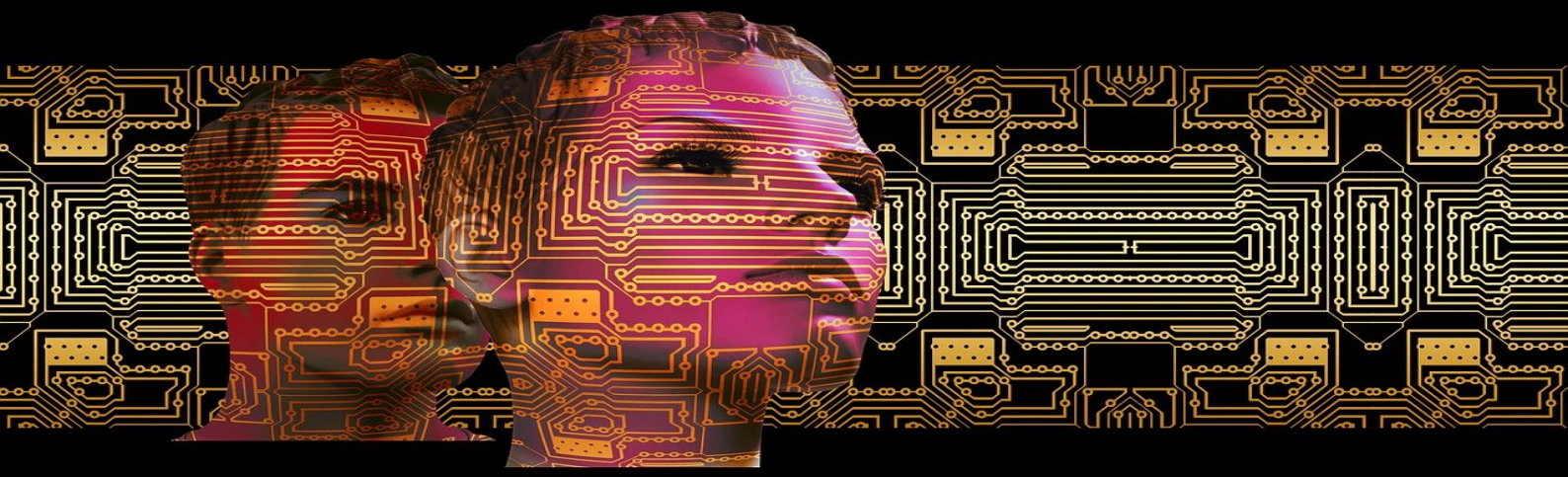|	CoE Foundation	POC / Pilot Implementation	Change Management
Key Components	**Build the Foundation (CoE)** *Identify and articulate a desired future state capability, define functional structures and interactions, and quantify the business value of Robotics*	**Prove The Value and Scale** *Evaluate Robotics vendors and conduct Proof-of-Concept to prove the value of Robotics*	**Transition to the Virtual Workforce** *Understand the impacts of Robotics and prepare the Enterprise for change*

Key Outcomes

CoE Foundation:
- Clearly Articulated Vision & Objectives
- Key Roles, Responsibilities & Interactions Defined
- Robotics Methodology Documented
- Leading Practices Documented ✓
- Process Selection Framework Established
- Robotics Opportunity Areas Identified ✓
- Robotics Enterprise Roadmap Developed
- Robotics Enterprise Investment Case Developed
- Interim-State Support Model Defined

POC / Pilot Implementation:
- Business & Technology Readiness Assessed ✓
- Vendors Assessed & Selected ✓
- Robotics Licenses Sourced ✓
- Pilot Architecture / Environment Provisioned & Set Up ✓
- Proof-of-Concept Configured ✓
- Robotics Training Delivered
- Robotics Use Cases Validated
- Pilot / Production Planning Completed
- Pilot / Production Process Configured
- Lessons Learned Documented ✓
- Steady State (BAU) Support Model Defined

Change Management:
- Change Mgmt. & Comms. Strategy Defined
- Change Mgmt. & Comms. Plan Developed
- Change & Comms. Tools & Templates Developed
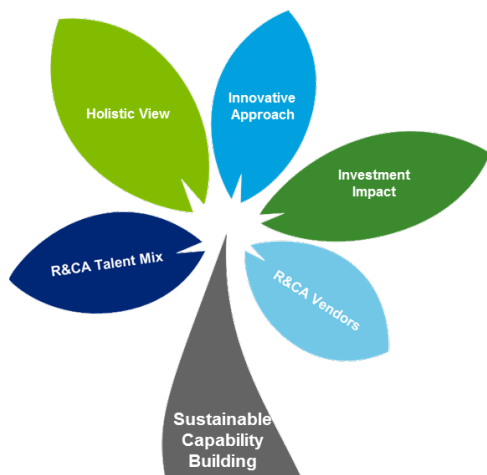- Workforce Transition Plan Developed

Our Value Proposition

We bring a holistic and innovative approach to Robotics implementations, along with an experienced team to rapidly execute against the program mandate

Sustainable Capability Building – We Understand How To Set You Up For Success
Our team will ensure your organization can sustainably support Robotics and continue to build this capability to scale.

Robotics Talent Mix – We Bring a Canadian Team with Local Leadership & Global SME's
We bring an integrated operations, process driven, technology and change management team, with hands-on Robotics implementation experience at several clients in the Canadian marketplace. We also bring a global client list, and critical lessons learned to accelerate your mandate.

Holistic View – This is more than Technology, it's about Op Model, Process and People
Robotics implementations are 10% Robotic & Cognitive Automation, and 90% vision, operating model, governance and change management. The impact of a virtual workforce is immense, and our holistic approach includes key ingredients for long-term success.

Innovative Approach – We Break Through Barriers to Unlock True Robotics Potential
We bring a differentiated hybrid agile approach to Robotics delivery, combined with strong process optimization expertise to help navigate / break through business, technology, risk, controls, and compliance barriers. Successful implementations require a change in mindset & innovative thinking!

Investment Impact – We Know How to Assess Enterprise Impact, it's about an Ecosystem
We understand how to implement Robotics technology into production to extrapolate value and impact across organizations. While clients can experience significant (15-30%) productivity gains, the true value of Robotics is about re-designing / re-imaging processes in a "human-bot ecosystem"
– these are key ingredients in creating and sustaining a virtual workplace of the future!

Robotics Vendors – We Understand the Vendor Landscape and Leading Robotics Platforms We bring a global Robotics team with practical experience using leading Robotics technologies (Blue Prism, Automation Anywhere, Work Fusion).

Process Observation – Top Discussion Items		Facilitation Materials
Key Process Steps	Exception Scenarios	
Data Inputs & Formats	Data Outputs & Destinations	
Business Decision Logic & Rules	Process Triggers	
Data Drivers Within Process	Risk & Compliance Considerations	
System Access Requirements	Possible Application Screens And Pop-up Windows	

*We will use our **Process Assessment Questionnaire** to guide the observation and ensure key requirements of the process are clarified and understood*
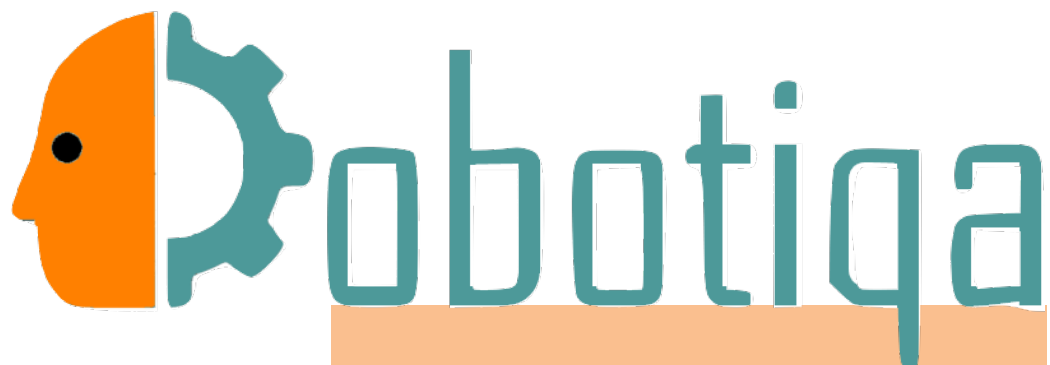
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