



GUIDE

# BEFORE UNLEASHING THE BOTS

READ THIS GUIDE TO PROCESS-FIRST RPA

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# EXECUTIVE SUMMARY

Automation can help organisations to optimise their resources while running leaner, more effective business processes.

One such technology is robotic process automation (RPA). This field of robotics operates virtually rather than physically – automating rote, rules-based tasks that tend to happen at high volume and monopolise employees' time. RPA solutions, also known as 'bots', can be configured to handle these mundane business activities independently of human intervention, operating on the same application user interfaces as people do.

RPA is no longer an emerging technology, but rather one that has been explored and implemented in a range of industries, with varying results. Live scenarios have demonstrated that RPA does deliver the desired business benefits – and the market for RPA solutions is growing at a healthy pace.



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# BUSINESS CASE FOR RPA

On the most fundamental level, RPA can be harnessed to relieve employees from procedural tasks. This can either reduce head count or, more strategically perhaps, liberate skilled employees from work that software can do for them – thus allowing them to focus on other areas of their roles that make better use of their knowledge, expertise and skill sets.

Deutsche Bank CEO, John Cryan, once said, “Right now, many finance jobs require people to act like robots, so they’ll easily be replaced by robots.” Instead of viewing bots as a threat to human jobs, however, it could rather be perceived as an opportunity for companies to rethink roles that could be re-designed to take the business forward.

With bots and humans supporting each other synergistically, organisations in the financial services industry and beyond can gain more value from both their human and digital workforce.

# Let's explore the value of RPA

The purpose of this guide is to outline the business benefits and challenges of implementing software robotics, as well as to explore how RPA adds value to a broader process transformation strategy.

We also provide step-by-step guidance on how to effectively implement an RPA solution in your organisation.

## CHAPTER ONE

# What can bots do for my business?

When developing a business case for any new technology, it's important to weigh the advantages against the implementation roadblocks. And when considering these pros and cons, it's advisable to look beyond the immediate outcomes and assess the enterprise-wide impact.

Let's first explore some common benefits...

# 1

## Quick productivity gains

Because RPA software interfaces with existing applications and systems, it can be rolled out rapidly, with minimal business disruption. At the same time, bots are typically applied to existing processes, so productivity gains can be realised in a short timeframe (sometimes only weeks).

When implemented effectively, this technology can increase productivity levels quickly. Once bots are up and running, they can work around the clock as they do not need sick days or annual leave.

# 2

## Reduced labour expenses

By delegating labour-intensive processes to RPA, companies can cut costs such as salaries, overheads and so forth, while adding more flexibility into the labour pool (because RPA resources are highly scalable).

Unlike outsourcing or offshoring, RPA keeps the work in-house. This means companies can manage the 'workforce' more closely; while those in regulated industries are also able to comply with data privacy and residency regulations, prove governance standards and so forth.

3

## ROI is easy to measure

Research firm Forrester has pointed out that ROI is easy to prove, because the cost of a bot ranges from USD 5,000 to USD 10,000 annually; and this can be directly compared to the expenses associated with workers who are replaced or re-assigned due to the technology.<sup>1</sup>

4

## Consistent, accurate output

RPA technology is designed to carry out the type of routine tasks that people are usually responsible for. Because this work is digitised and automated, the risk of human error and its potential costly consequences are reduced. At the same time, tasks are processed the same way every time, which enhances consistency and the quality of output.

# 5

## Compliance

With everything handled digitally, the firm has access to meta data that provides process oversight and supports regulatory compliance. When the software logs every action, it's easy to monitor progress and prove the who, what and how of processes – should this information be required by internal or external auditors.

# 6

## Data processing

Many industries are data-driven. Their processes rely on large volumes of documents and data, as well as multiple legacy systems that store and manage this information. RPA can reach across these systems to retrieve and collate data for reports, customer on-boarding processes and other process outputs.

# 7

## Growing the business

With the ability to work 24/7 and scale quickly to meet demand, RPA allows companies to increase output and expand operations or react rapidly to new business opportunities. Whether organisations want to increase the lifetime value of customers or explore new income opportunities, bots provide the efficiency and agility required to support these business goals.

Considering all these benefits, RPA may seem like an ideal solution to your business process pain points. However, as with any technology, it also has its limits.

## CHAPTER TWO

# Where does RPA fall short of expectations?

Bots can certainly optimise a range of tasks in the back office and beyond. However, in its current form, RPA technology is not a complete business process management solution, but rather one automation approach that can be leveraged as part of wider digital transformation strategy.

Here are some obstacles that organisations may encounter, as well as issues that need to be considered, when implementing software robotics at an enterprise level...

# Bots can't handle every process

Companies need to be strategic about the type of tasks that they choose to automate through RPA. This technology is currently only suited to tasks that are highly-definable, standardised and require minimal human intervention. Bots are not (yet) capable of making judgement-based decisions, handling exceptions to the rule or dealing efficiently with unstructured data.

However, artificial intelligence (AI) and machine learning technologies continue to develop. Gartner has predicted that smart machine technologies “will be the most disruptive class of technologies over the next 10 years due to radical computational power.” If RPA does become more intelligent, due to advances in machine learning, natural language processing and so forth, businesses could potentially use this type of automation solution more widely across the enterprise.

Right now, however, only certain structured processes can be delegated to software robotics.

## RPA can be a quick fix

The fact that RPA technology can be layered over legacy technology may be viewed as an advantage by some companies, but often – this becomes a challenge in time. This is because some organisations are tempted to use RPA to patch over and extend the lifespan of IT systems that are not serving business needs as well as they could. While RPA may streamline processes that run on these systems to a certain extent, this approach is not a forward-thinking one, as these legacy systems will become slower and more outdated as time marches on, putting the firm on the back foot.

# Security considerations

As with any new technology solution, RPA requires robust IT security coverage – and this puts pressure on the IT function, which may already be managing a range of other business optimisation tools. Firstly, it's important to choose a product from a trusted and reputable RPA software vendor. Secondly, it's important to manage security risks in data-related processes, especially those that involve the handling of sensitive data like banking details or confidential personal information. The IT team will need to provide bots with their own role-based user IDs and passwords, so that all data systems are access-controlled; and data handling is clearly monitored according to user rights. Robust data encryption measures also need to be in place.

## Bots need to be managed

Any firm implementing a digital workforce will need to update their governance and control strategies to ensure that bots' availability and performance is closely monitored and supervised. This calls for a management mind-set shift at all levels of the organisation. And when the RPA solutions are scaled across the enterprise, this will require a greater, ongoing time and effort investment from management.<sup>2</sup>

<sup>2</sup> <https://www.pwc.com.au/publications/assets/rpa-risk-controls.pdf>

## CHAPTER THREE

# The process-based approach

It's clear that while RPA has a lot of value to add in the business context, this is not ready-to-use, nor is it one-size-fits-all. When adopting this type of automation solution, it's essential to consider whether your technical foundation and core systems, your security policies, your management framework and your processes themselves are ready to harness the full potential of software robotics.

Rather than starting with the technology choice, begin by looking at your business processes. You need to identify the following...

# Which processes need to be improved, streamlined and automated?

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As discussed, RPA is well-suited to automating tasks that are stable, standardised and repetitive, such as copy-and-paste activities, multi-system data entry and validation, formatting documents and information retrieval, to name but a few examples. This type of work is often only part of a process and not the entire process.

# Are these processes well designed?

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It's important to understand that automating a poorly designed process is unlikely to provide an outcome that lives up to expectations. To truly save time, cut costs and reduce risks, for example, a process overhaul may be required before layering over the automation technology. In other words: you need to take a process-first approach.

# What are your business optimisation goals?

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Aiming for process excellence is not the final goal. You need to ask what process excellence can do for your business. This involves defining the business goals that are driving the need for automation. What are you hoping to achieve, ultimately?

If you are merely looking to control costs and improve operational efficiency in certain lines of business, RPA may be a good fit. But if you're looking to elevate corporate performance across the enterprise and increase competitive advantage through true digital transformation, then RPA may only be part of a wider process-based automation solution.

## CHAPTER FOUR

# Steps to achieving an effective RPA solution

## DISCOVERY

1

**Hold a discovery workshop** to identify processes that would benefit from automation.

**Involve employees** who are currently involved in each process, as their input can help to clarify areas for improvement. Also, being involved from the get-go will improve their chances of harnessing the full benefits of automation once it is rolled out.

**Aim to gain a thorough understanding of how processes are working** on the ground, where the roadblocks are and what could be done to address these.

**Consider the changes you might make** to people's roles if they're liberated from work that is planned for automation.

**Be sure to garner support from senior management and IT** early on, to ensure all decisions align with business strategy and IT policies

2

# PROCESS DESIGN

**Design each process** that has been identified for improvement in a workshop setting.

**Clarify which steps automation can handle** and which steps require human intervention.

**This will help you to produce a detailed functional blueprint** for each required process automation solution.

**You will also gain a better understanding** of the project scope and timescales.

**Aim to compile a project plan** with clear delivery milestones.

3

# TECH NOLOGY

Once process improvements have been clearly mapped, **consider whether RPA is the most suitable automation technology.**

It's important to consider **ROI in the short, medium- and long-term.**

# MODEL LING

4

It's worth devoting the time and effort towards carefully modelling each process that has been selected for robotic automation – to ensure all stakeholders' expectations are understood and met.

If only part of the process will be delegated to a bot, it's important to **clarify roles and responsibilities** for the rest of the process activities, and to identify the other tools that will be used to streamline the flow of work between people and bots.

# P.O.C.

5

For this phase, which is essentially a controlled experiment, it's ideal to **choose one standard, rules-based, high-volume process** that is perfectly suited to RPA, before looking to scale or tackle more complex processes.

**Build a business case for applying RPA** to this process and compare this to other potential automation and IT solutions. Consider the implementation timeframe, business impact and return on investment.

During this phase, be sure to **take governance, process ownership, monitoring, control and IT security issues into account.**

6

PIL  
OT

Focus on preparing the operational and technical environment for the implementation of an RPA-driven process.

This may involve **digitising paper-based assets**, and **cleaning and standardising data**.

You also need to **set up a digital process trigger** that will initiate the bot.

Once all this is in place, **the bots can be configured, tested and deployed**.

7

LEV  
ERA  
GE

Once the pilot RPA-driven process has been implemented, monitored and if relevant, further optimised to ensure maximum ROI, it's time to **identify all the other use cases for RPA across the organisation**.

## CHAPTER FIVE

# The value of an expert process automation partner

When RPA is not implemented strategically as part of a broader process improvement and business optimisation strategy, the technology solution you choose may not deliver the results you're expecting.

By collaborating with an independent partner that has expertise in process automation and does not come from within an RPA vendor organisation, you can overcome this challenge and optimise the ROI of your business automation solution.

# Position your process automation programme for success

Velocity IT can act as your independent and expert business process automation partner, providing guidance on how to choose technology that's fit-for-purpose and how to build a strategic foundation for process automation from the get-go.

We can also help you to determine how your governance and IT functions will work with the RPA team to support automation development and IT change management in line with broader business goals and any relevant regulatory compliance requirements.

With our in-depth support, you can implement process automation successfully across your enterprise – and put a framework in place that helps all people, processes, systems and machines in the business to transition seamlessly to a new operating model that is powered by automation.

Keen to find  
out more? Book a  
RPA Discovery Session  
with Velocity IT today:  
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