WorkFusion

The Four Phases of Digital Transformation

The Intelligent Automation Maturity Model

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As **Intelligent Automation** begins to mature, larger patterns around implementation are starting to emerge. We're learning that in order for a digital transformation to be successful, there's a need for certain program management and technical competencies. These competencies include use case selection, data privacy controls reducing the total cost of ownership, and more, as the IA experience widens. We benchmarked four stages of maturity that are relevant for most organizations. We have identified the programmatic competencies required to support each stage, and beyond, to help you move seamlessly through the continuum.

But, due to the nascent nature of Intelligent Automation, its maturity is not linear. As you examine the components of each stage, you may find that you have skipped to certain enablers without a clear sense of what's next.

Our aim is to provide a 10,000 foot view of these stages. We hope it will help you assess gaps and spot potentially missed opportunities along the way.

"Risk is essential. There is no growth of inspiration in staying within what is safe and comfortable. Once you find out what you do best, why not try something else?"

Alex Noble
Artist & Author

Four stages at-a-glance

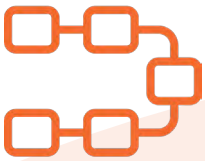
	Early Stage	Mid-Stage	Growth	Mature
	Planning and testing, forming partner relationships and organizational capabilities	Industrializing the capability, growing awareness and support, benchmarking value	Scaling across enterprise, integrating with other programs, developing value-added capabilities	BAU, rationalize footprint, continuous improvement and innovation
THEME	PoC and pilots	Production	Scaling	Optimizing
SCALE	<10 processes	5-20 processes	20-100 processes	100+ processes
GOALS	▪ Identify opportunities ▪ Select tools/ partners ▪ Test capabilities ▪ Develop approach	▪ Harden capability ▪ Benchmark ▪ Grow support ▪ Raise Awareness ▪ Start enablement ▪ Pick focus areas	▪ Mature CoE ▪ Define operating model ▪ Introduce change mgmt. ▪ Scale training ▪ Scale capability ▪ Federate the program	▪ Embed IA into service optimization model ▪ Embed IA into sourcing ▪ Effective governance ▪ CI ▪ Innovation
ADDRESSING THE 10 MOST COMMON PROBLEMS	Don't over-do business cases Train teams, manage comms proactively Get IT involved, establish infrastructure	Define strategy, establish sponsorship Develop an opportunity assessment methodology Build value realization framework Address security	Link to Lean and other techniques Be agile, do not automate 100% Treat Automation as business-led	

Best practices for moving through the continuum

At-a-glance tips for getting past common problems, and applying progress to your momentum

Don't be afraid to **change course**; adapting to emerging tech means shifting goalposts and setting the right expectations.

Successful implementations depend on strong **engagement** from all stakeholders.



Choose business processes that set your teams up for success. **Standardize** the approach by only collecting data that assists in making decisions easier, and use a digital intake site to collect this data.

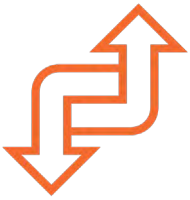
All deployments must account for the data in scope, meaning that you will have to assess the **security** you will need to ensure that access to your data stays private and in compliance.

Intelligent Automation connects systems of record to perform human actions; this means that those processes may need to be optimized first.

Define your business' vision for a **minimum viable product**, or minimum releasable feature, that represents success for your implementation. This keeps implementation confidence moving in the right direction.

Before you determine if you need to optimize a process prior to automation, we recommend calculating **calorie burn** on maintaining it as-is versus tackling a potential major adjustment that requires a configuration change.

As you transition into growth, **power users** are key players in the scaling of IA across multiple businesses.

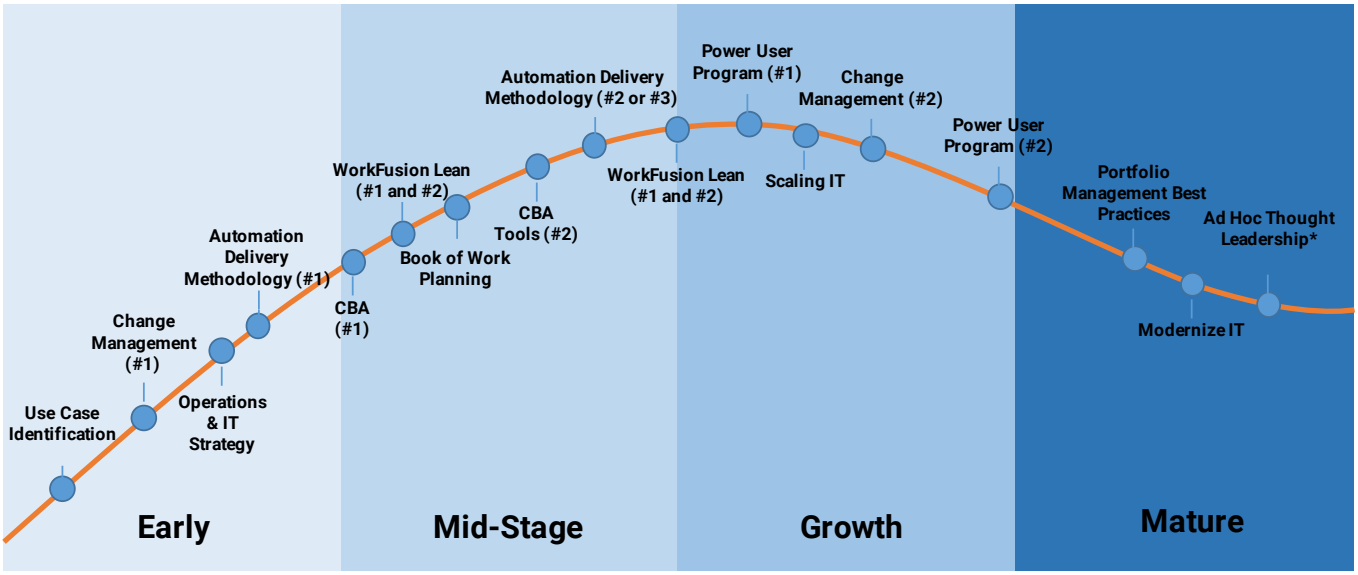


It is important to recognize and thoughtfully prepare your organization for **change**, both internally and externally.

Create a balanced **scorecard** for demonstrating value to your organization through quick wins, large impact, and creative technical strategies.

Client lifecycle by maturity stage

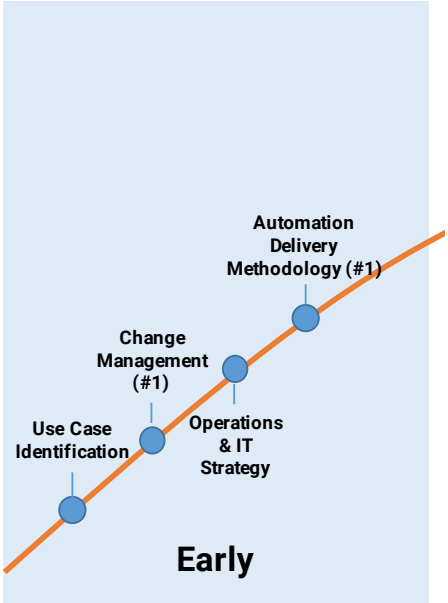
Best practices for scaling Intelligent Automation —
seen through the lens of WorkFusion's Maturity Model program



Early	Mid-Stage	Growth	Mature
Still evaluating tools/use cases and strategic fit within the organization; actively pursuing POC/pilot	At least one use case actively in production	Multiple disjointed use cases in production lacking enterprise cohesiveness	Centralized program ready to scale

Early stage

Still evaluating tools/use cases and strategic fit within the organization; actively pursuing POC/pilot



PROGRAMS

Use case identification:

Identifying the right starting point

Typically, this is where most implementations should start. Identifying the right (or wrong) use case is the first step towards understanding how to apply the chosen automation tool. This process is typically refined multiple times to ensure the right fit.

Change management #1:

Planning for the six pillars

The implementation of Intelligent Automation is considered a transformation, which differs greatly from BAU change management. Therefore, it's necessary to apply additional planning and implementation tools in order to ensure the smoothest transition possible. The first stage is examining the potential of the change.

Operations & IT strategy:

Developing an initial infrastructure platform

When we first start testing the functionality of the tool, large scale infrastructure acquisitions are unnecessary. Early POCs and pilots generally do not require large-scale installations up front. You just need to be able to support the production load for a few use cases in order to gauge what's necessary for scaling.

Automation Delivery Methodology #1:

Identifying the right delivery method

Although we recommend that organizations focus on applying Agile and Scrum to project long-term delivery, early delivery methodologies typically lean Waterfall. Though this is the most widely used project management style for enterprise software delivery, Waterfall tends to lengthen timelines for automation, and deliver sub-par products. We recommend that you explore different methodologies and delivery centers at this time in order to plan for the road ahead.

Mid-stage

At least one use case actively in production

PROGRAMS

Cost Benefit Analysis (CBA) #1:

Identifying the initial costs and benefits of your program

Your initial use cases will help you extrapolate high level costs in the first year of your program. This process will be scaled and refined post Book of Work planning.

WorkFusion Lean #1:

Optimization basics and gap assessment

Intelligent Automation (IA) means that business processes are automated by mimicking human actions via the application user interfaces they use. This presents unique opportunities for you to optimize those processes prior to automating them. The WorkFusion Lean Program gives you a basic understanding of best practices for reengineering processes prior to automation.

Book of Work Planning:

Scaling across multiple businesses and timelines

Initial use case identification can only take your vision so far. To get the enterprise-grade benefits of IA, you will need to perform large-scaling book of work modeling across multiple businesses and/or timelines. This will provide line of sight into your pipeline, and also act as a primary input into your second-stage CBA exercise.

Cost Benefit Analysis (CBA) #2:

Identifying the right delivery method

Waterfall is the most typical early delivery methodology. However, we recommend that you explore different methodologies at this time in order to get ready for the road ahead.

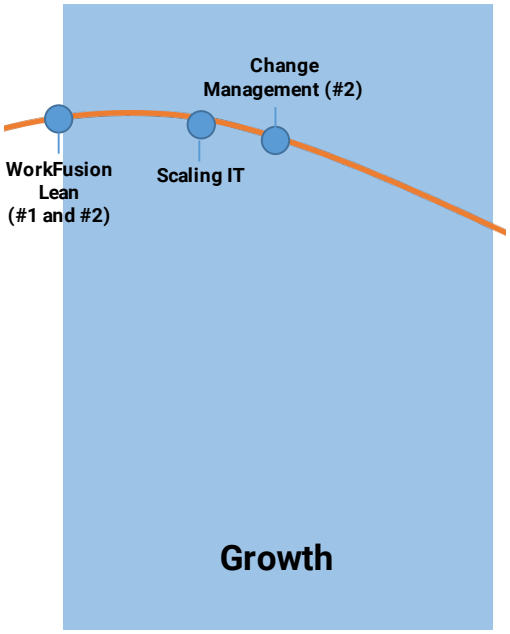
Automation Delivery Methodology #2 or #3:

Setting up your factory or augmenting your CoE

Whether your company has a mature Center of Excellence (CoE) framework (#2), or you are setting up a factory up for the first time (#3), this is where your methodology moves from tactical program and project management to decision-making about delivery and centralization.

Growth stage

Multiple disjointed use cases in production lacking enterprise cohesiveness



PROGRAMS

WorkFusion Lean #2:

Advancing reengineering techniques as part of your IA footprint

WorkFusion Lean's Practitioner Program offers the guidance you need if your organization does not have a formal Lean structure, or if you want to augment your existing practices with an optimization protocol that is specifically geared toward IA.

Power User Program #1:

Assessing how to scale and reduce costs

As you grow, the total cost of ownership will adjust downward considerably over time. But that will only happen if you leverage the tool's ability to be configured by non-technical staff. We call these citizen developers Power Users, and this is the right time to start identifying them.

Scaling IT:

Expanding your infrastructure to support your incoming productions

Building the appropriate infrastructure can begin as early as Mid-Stage, but we often find that expansion is best executed in the Growth Stage. At this point, you have learned enough to be able to make decisions that significantly impacts cost, such as on-premise versus cloud.

Change Management #2:

Reading the organization for transformation

As you embrace the full capabilities of Intelligent Automation, you will do business in a new way. This will impact every business, every customer, and every employee in your company. Typically, this is the stage when your Change Management plans are ready for execution.

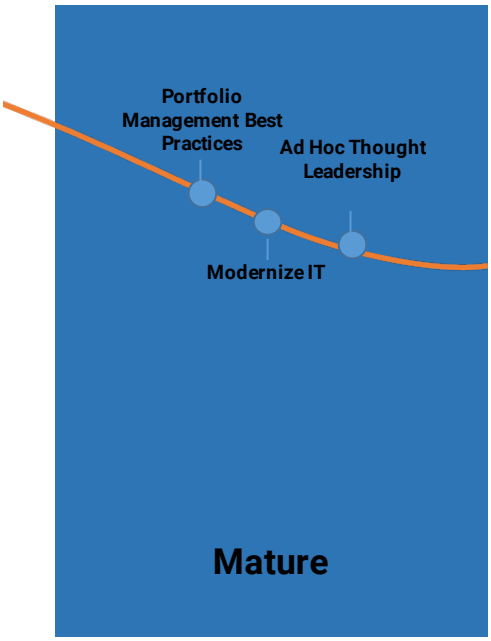
Power User Program #2

Setting up the factory or CoE 2.0

Toward the end of the Growth Stage, you will start transitioning developers and power users. As IA best practices get more widespread in the marketplace, you may be able to do this at an earlier stage. But, it is essential to "work out the kinks" before distributing this technology as an end user computing tool (EUC).

Mature stage

Centralized program ready to scale



PROGRAMS

Portfolio Management Best Practices

Advancing from KPIs to business intelligence

Once your program moves into maturity, overall refinements, shifts, and digital transformation will occur on a scale that requires you to apply enterprise-wide intelligence. We recommend getting ahead of dashboard standardization to be ready to connect to broader big data visuals and reporting.

Modernize IT

Implementing the newest and best

As technology changes, so do the available options for IA support. At this point, your organization may move to a Cloud platform, or even IA as a service.

Ad Hoc Thought Leadership

Reaching into your network for new ideas

When you reach maturity, you are ready to really scale. That means that your business is ready to perform in a new way. This presents an opportunity to reach out into a more mature network to leverage the best practices of others. Implementing a veteran approach, or using it to validate your own, is a necessary final step in becoming an IA BAU Enterprise.

ABOUT THE AUTHOR

Jennifer Valenti leads WorkFusion's management consulting arm, guiding clients through the implementation of artificial Intelligence technologies with the goal of driving efficiencies across business processes. Follow Jen on twitter @Jen_Valenti.

ABOUT WORKFUSION

WorkFusion's Intelligent Automation empowers enterprise operations to digitize. WorkFusion combines all of the RPA and AI-powered capabilities that global businesses need to digitize into enterprise-grade automation products purpose-built for operations professionals. Operations teams at data-intensive organizations, such as global banking and financial services companies, healthcare and insurance providers, and BPO firms use WorkFusion Intelligent Automation to become leaner, more productive and agile.

For more information on scaling intelligent automation within your organization, contact us at learn@workfusion.com or visit workfusion.com.

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