



Assisting Global Enterprises with Web, Mobile & Cloud Enabled Technologies & Solutions

3 Reasons SMBs Need to Automate Business Processes

Costs, Productivity & Quality

7/26/2018

USA | AFRICA | UAE | INDIA

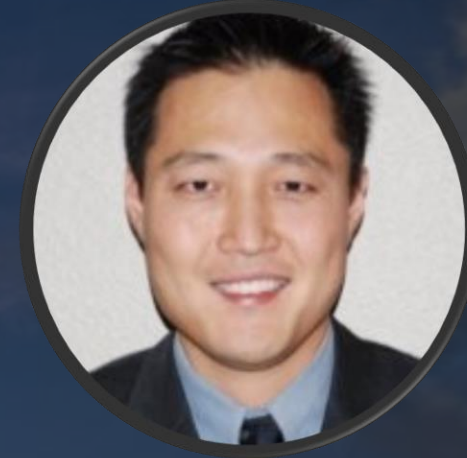
Speakers



Ritwik Bose
Senior Director Consulting



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Solution Architect



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CEO & President



Enabling Digital Transformation

Helping Companies Change How They Do **Business**



WHO WE ARE

We believe in staying in the cusp of innovation and at the forefront of technology that can be applied to solve business problems.



- **Latest Technologies**
- **Highly Successful Implementations**
- **Problem Solving, Opportunity Enabling Solutions**

IMPIGER SNAPSHOT

What we are today

225+ Clients

13 Years Old

300+ Workforce

300+ Mobile Apps

200+ Web Portals

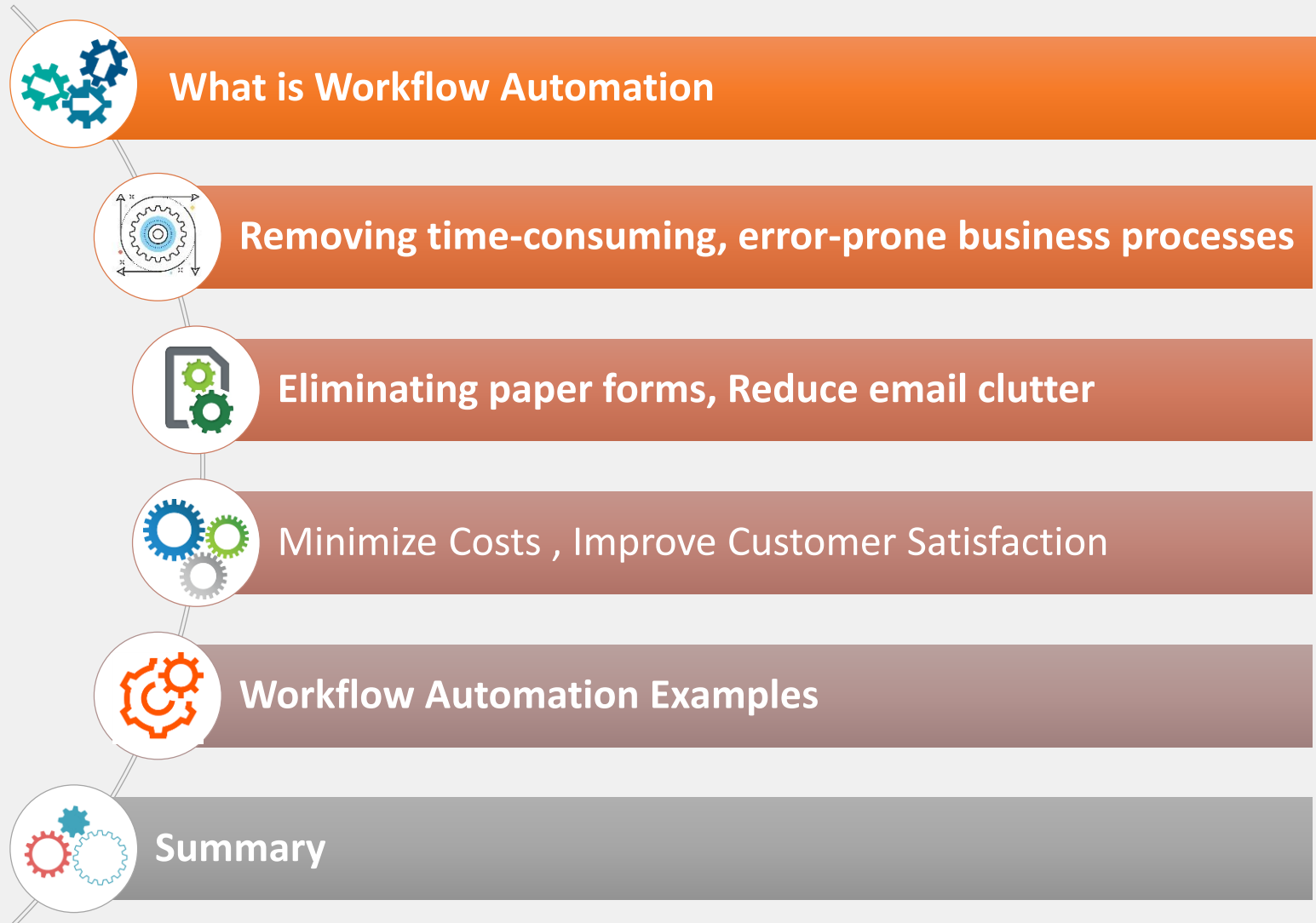
5 Locations

Mobile , Web & Cloud

RPA & AI

ITIS & IoT

AGENDA



DIGITAL TRANSFORMATION

Business-Model Transformation



Digitalizing business operations



Transforming Customer & User experience



Robots have been used for years on the factory floor

Automation of the production line has always been about reducing time, costs and improving quality.

Automation is not just for the production line!

Productivity

Innovation

Repeatability

Reliability

Control

AUTOMATION

Technology

Precision

Digital Waves

1st Wave

The Internet

Connected, online

Online consumer business

2nd Wave

The Mobile Internet

Real-time, anywhere

3rd Wave

The Internet of Things

Convergence of physical & digital

4th Wave

AI and Robotics

Knowledge & automation

Hyperconnected World

A huge impact for all industry

What is Intelligent Digital Automation?

Artificial Intelligence (AI) Chat Bots

Robotic Process Automation (RPA)

Process

Workflow Automation

Technology

Productivity

Innovation

Repeatability

Reliability

Control

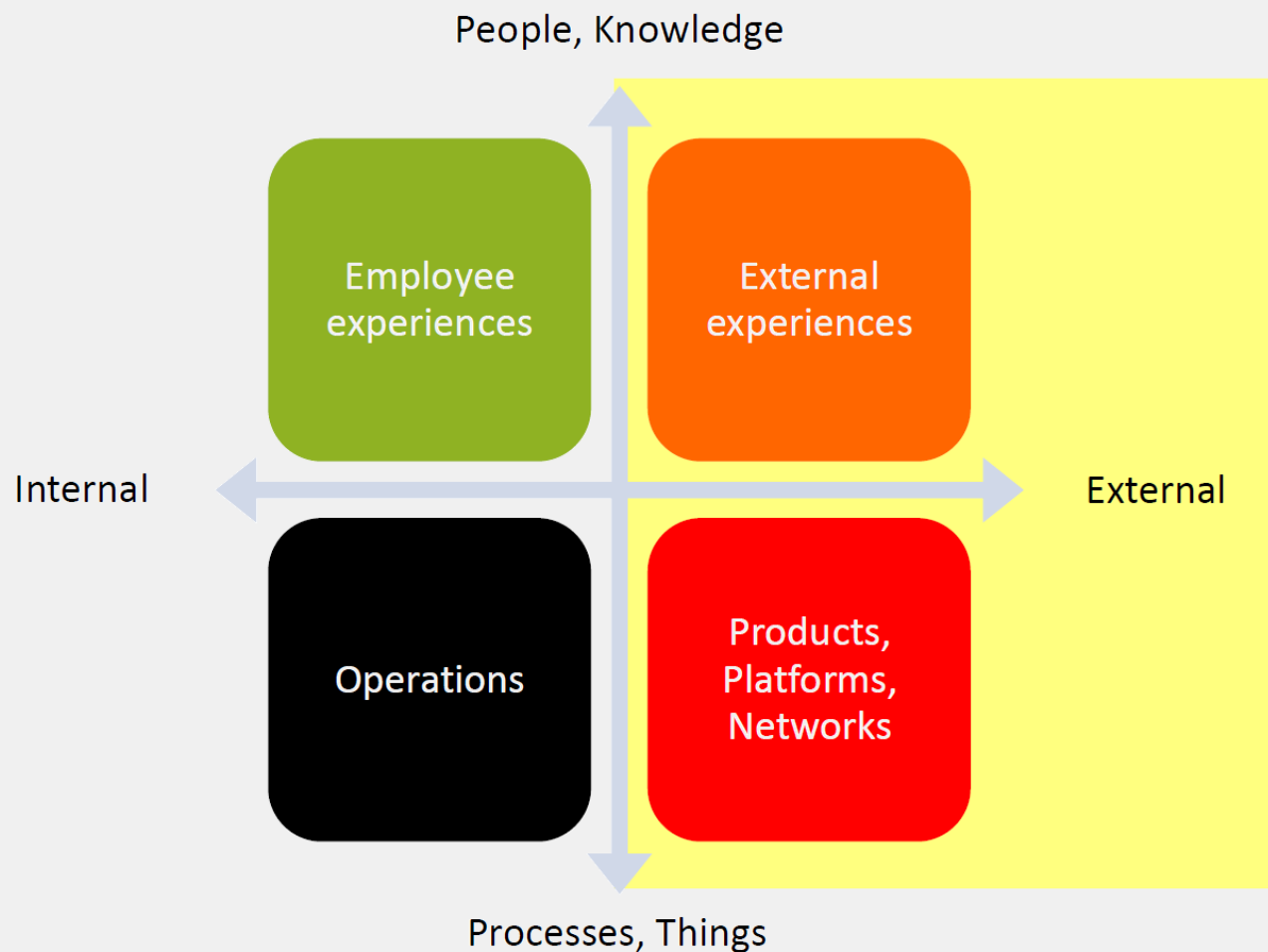


AUTOMATION

Precision

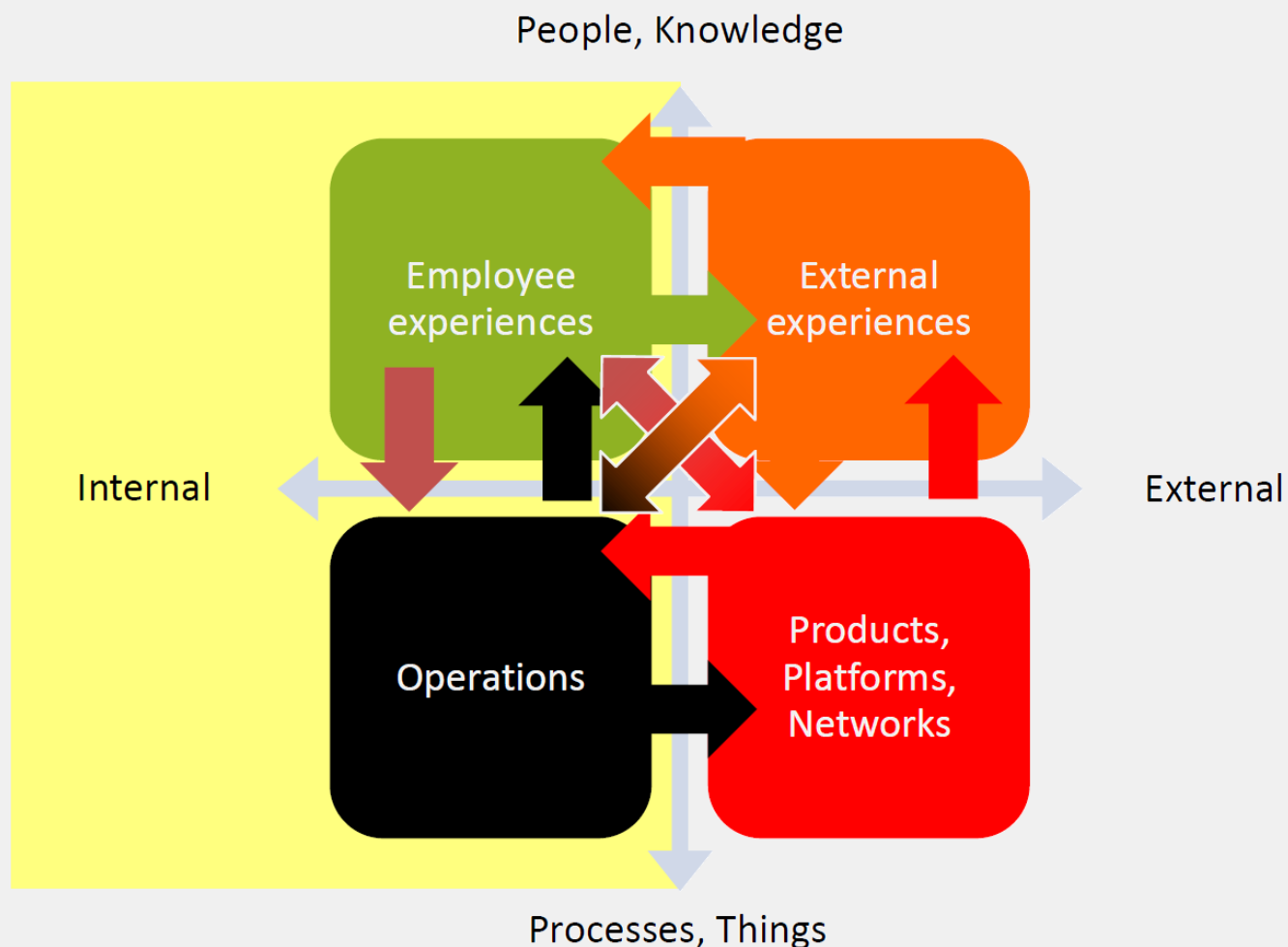
We Focus on Digital Outside

The power of Digital approaches:
more efficient co-ordination of resources



But 'Digital Outside' has to be supported by 'Digital Inside'

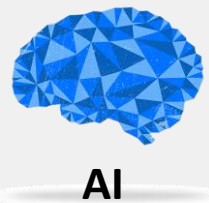
Boundaries Quickly becomes blurred...
Everything is connected



3 Common Focus Areas for Automation Tech

Work Discretion

Increase Impact of Experts



Expert Assistants

Make everyone as good as the Best



Decision Advisors

Workflow

Automate procedural routine tasks



Task Automators

Work Volume

What is Workflow Automation?

A digital workflow automation is the execution and automation of business processes where tasks, information or documents are passed from one participant to another for action, according to a set of procedural rules.

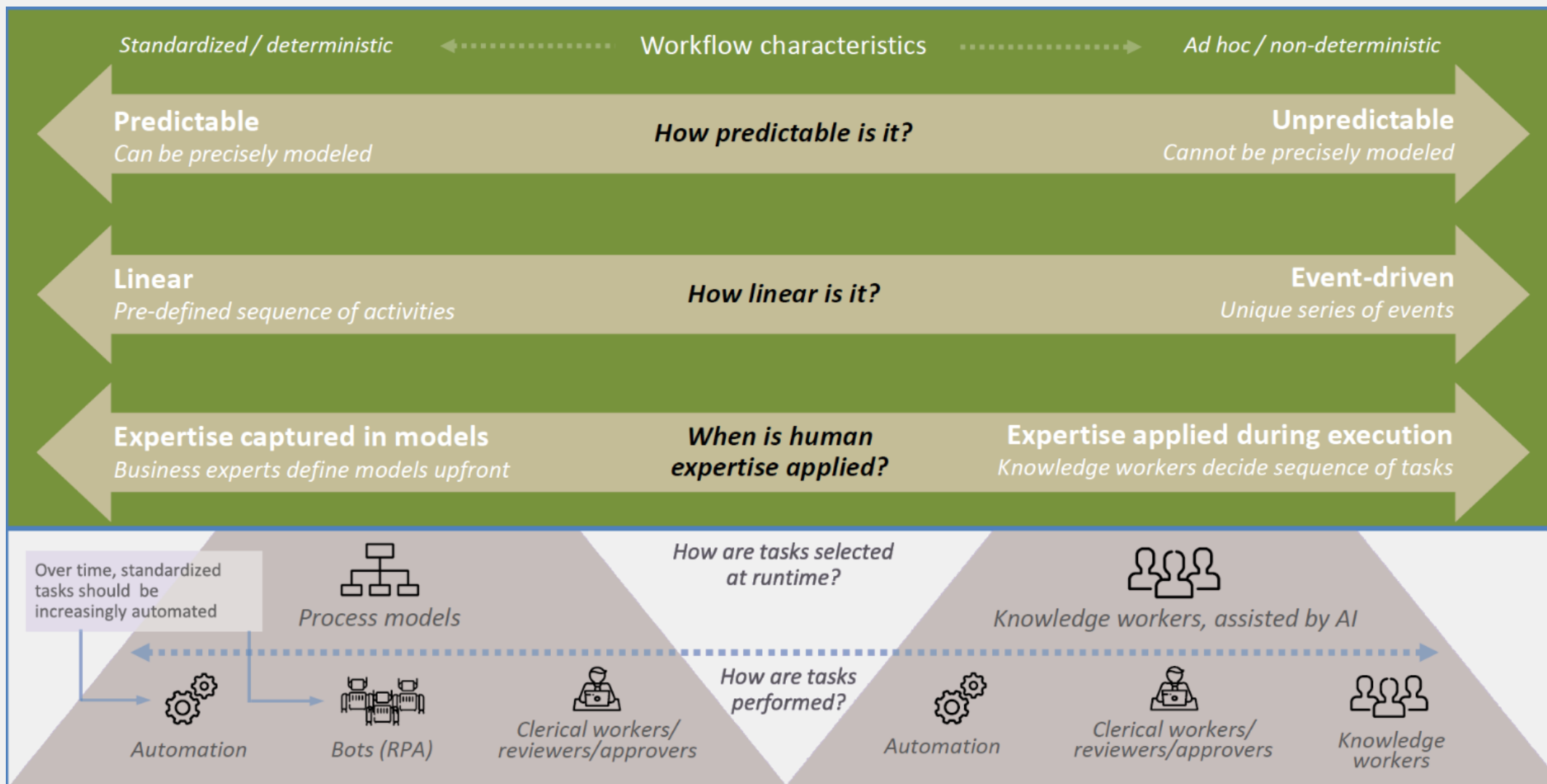


- **Improved Productivity**
 Automated digital workflows reduce the time spent on manual tasks.

- **Visibility**
 Workflows enable managers to see what is happening with business critical processes at every point along the process, and at any moment in time.

- **Improves Accountability**
 Monitoring time to execute business functions creates productivity measurement and continual process improvement

Workflow Characteristics



Workflow Are Everywhere



Insurance

- Automated claims processing
- Underwriting
- Fraud investigations



Healthcare

- Improved patient care processes
- Donor matching processes
- Acute medical investigations



Energy and utilities

- Power grid management
- Bill processing
- Energy consumption management



Retail

- Retail orders
- Customer service
- Customer loyalty programs



Banking

- Reduced loan processing times
- Customer onboarding
- Financial risk and regulatory investigations



Government

- Customs and border control
- Benefit claims and investigations
- Improved public safety



Travel and transportation

- Online ticketing and reservations
- Compensation management
- Customer service support



Manufacturing

- Manufacturing production quality and control
- Defect Investigations

But traditional applications can't completely solve the business workflow problem

Joint, Process-centric and Case-centric Workflows

What is Robotic Process Automation (RPA)?



1

Automate workflow processes

- By **mimicking** the way **people** interact with applications
- Through user **interface**
- Following **simple rules** to make decisions

2

Entire end-to-end processes can be performed by a robot

- Few **human** interactions - only to **manage exception**

3

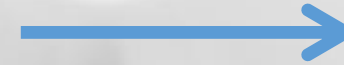
Automate any business activity involving users, data and systems

- Automate the acquisition and integration of information
- Create a single view on multiple datasource
- Transform data into valuable information

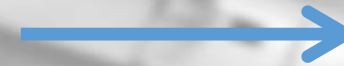
When does RPA make sense?

- **Inefficient processes** detected?
- **Manual workarounds** that fill IT gaps?
- Too **many errors** and inconsistencies?
- Too much **labor cost**?
- Refactoring processes necessary but **too expensive**?
- **Heterogeneous IT** systems which don't talk to each other?
- Employees **complain** about their work?
- Often makes **poor use of skills**?

Fast



Low cost



How Automation is changing Finance & Accounting

Finance & Accounting – ripe for automation

44%

of CFOs want to launch a digital project in the coming years.

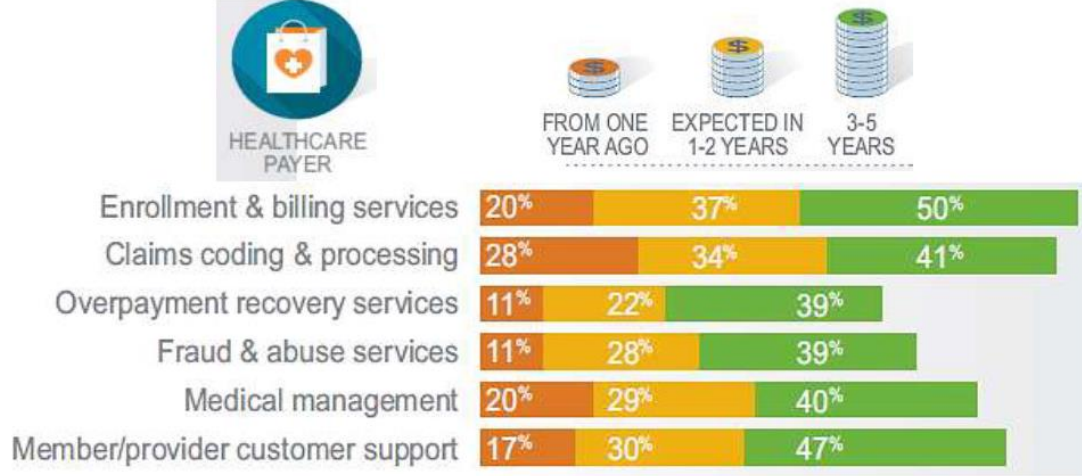
-71%

Reduction in costs when receiving a dematerialized invoice (P2P)

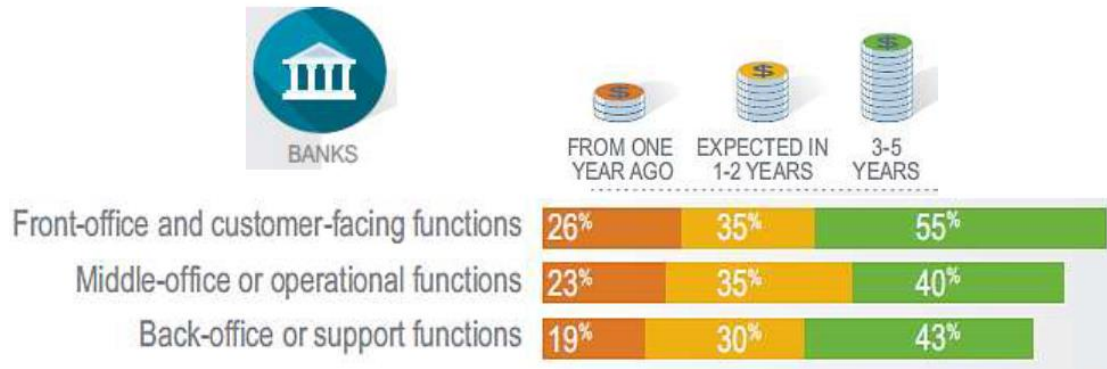
-65%

Reduction in costs when sending a dematerialized invoice (O2C)

RPA - Cost Saving Across Processes



As a result of automation 15% cost savings across front-office, middle-office and back-office functions



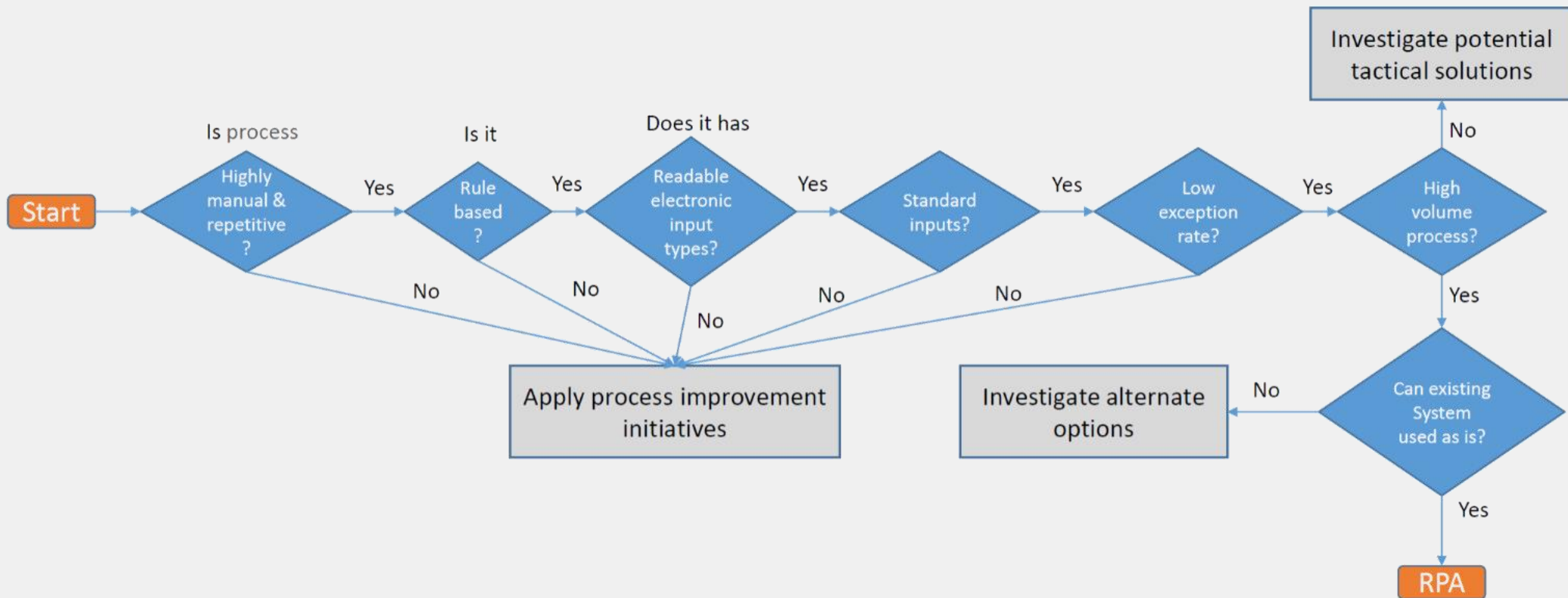
RPA Market – Trends that Drive implementation

RPA Qualifying Criteria Horizontal Processes	Multiple System Access	Prone to error	Can be broken into Business Rule	Low Human Involvement	Limited Exception Handling	High Volume / Value transaction
Finance and Accounting	●	●	●	●	●	●
Human Resources	●	●	●	●	●	●
Procurement	●	●	●	●	●	●
Supply Chain	●	●	●	○	○	●
Customer Experience Management	●	●	●	○	○	●

● High Applicability ● Low Applicability ○ No Applicability

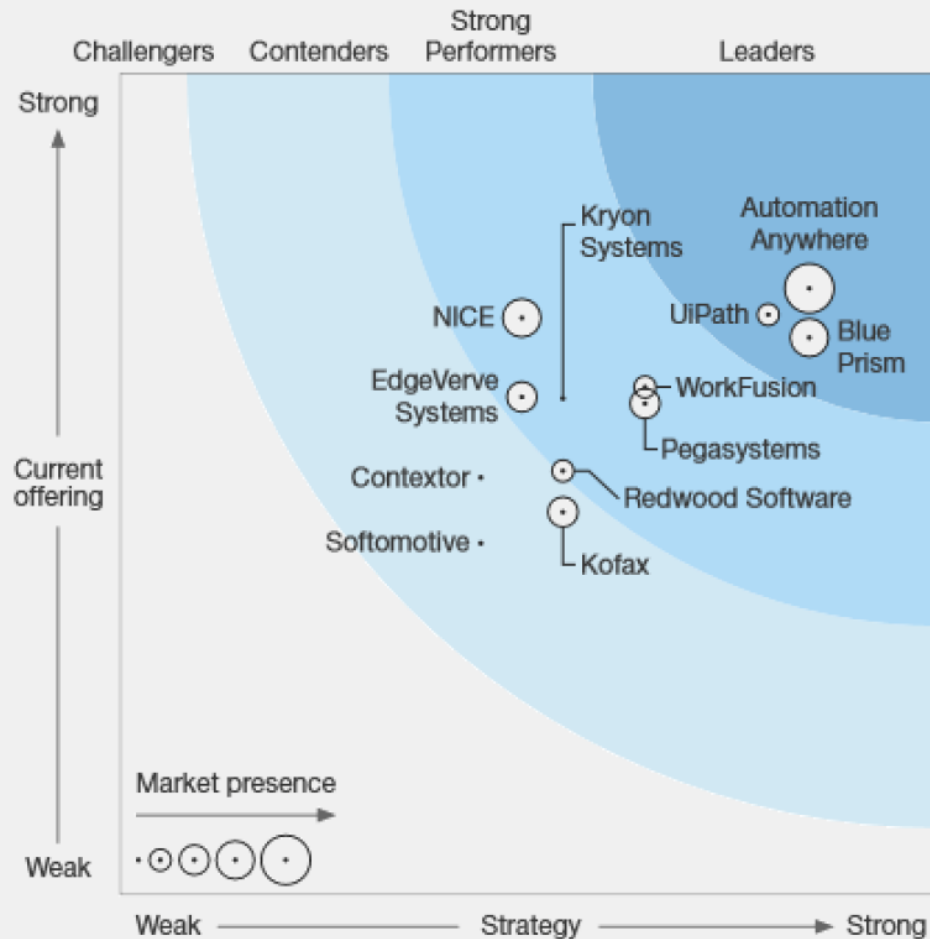
Services Outlook	Organization Outlook	Application Outlook	Regional Outlook
Professional services	Small and medium enterprise	BFSI	North America : U.S.
Training services	Large enterprises	Telecom/IT	North America: Canada
		Healthcare	Europe: Germany
		Retail	Europe: U.K.
		Manufacturing	Asia Pacific: China
		Others	Asia Pacific: India
			Asia Pacific: Japan
			Latin America: Brazil
			Middle East

How to choose the processes best fit for RPA?



Which Tools are Leading the Pack?

Evaluation Criteria: Current Offering | Strategy | Market Presence



Vendor Inclusion Criteria:

1. Has a **product orientation**, as opposed to a service orientation
2. Has strong breadth of RPA functionality
3. Markets actively in at least **2 major regions**
4. Meets at least **\$3M** in total software revenue derived from RPA
5. Has **significant market share** or is an innovator developing new capabilities
6. Generates **strong customer interest**

Which Tools are Leading the Pack?



- **Market share leader**
- Equal balance of direct and channel customers
- 90% back office/10% front office
- **RPA Pioneer founded in 2001**
- Strong partner focus and dependency – 80% of revenue from license fees
- No front office robots
- 90% of implementations delivered through partners– **success based on appeal to independent-minded partners and savvy end users**

Ease of Development

- More script based – need better programming skills
- Macro-recorder available
- Visual process designer
- Macro-recorder not available
- Visual process designer
- Macro-recorder available

Web-based vs. Client-based server

- Client based servers, accessible only through their apps.
- Client based servers, accessible only through their apps.
- “The Orchestrator” is web based, and can be accessed from the browser or mobile.

Pricing

- \$100K/year for the RPA platform, including:
 - 3 control rooms
 - 10 bot creators
 - 5 bot runners (5 bots)
- Additional licenses: \$10K control room, \$3K bot creator, 5K bot runner)
- Analytics Platform (\$50K)
- \$15K per robot/year (discounts start applying with 50+ robots)
- 10 min. licenses required **(\$150K min. investment)**
- no add-on costs for additional modules (analytics, control rooms, etc.)
- Lowest license cost
- Unattended bot: \$6K/year
- Attended bot: \$1.2K/year
- Orchestrator: \$20K/year
- Studio: \$3K-\$5K/year
- **No min. investment required**

Use Cases

Business Optimisation



Back Office & Clerical
e.g. Administration & Reporting



Front Office
e.g. Customer Support & Service Desk



End to End
i.e. Connecting Process Islands

IT Optimisation



IT Support
e.g. Service Desk, System Administration



Data Migration
e.g. Legacy System Integration / Transition / M&A

Strategic Change



Service Digitisation
i.e. Self Service & Channel Shift

Potential Application of Automation in the Finance Function

In the finance function, RPA can automate tasks that are of a repetitive nature and require tedious manual efforts.



Bank reconciliation process

- Automatic login to multiple bank accounts
- Automatic login to ERP system
- Extraction of relevant general ledgers by the Bot
- Preparation of templated bank reconciliation statement



Fixed asset management

- Acquisition of quotations from prescribed vendors
- Automatic preparation of report comparing multiple quotations
- Preparation of fixed asset budgets
- Fixed asset register reconciliations



Sales ordering and invoicing

- Automatic entry of sales inquiries
- Initiation of delivery process and updating of inventory records
- Preparation of sales invoice from sales order
- Posting of revenue entry into the system



Financial / External Reporting

- Financial reporting
- Regulatory reporting
- Statutory reporting
- Other reporting

Potential Application of Automation in the Finance Function

In the finance function, RPA can automate tasks that are of a repetitive nature and require tedious manual efforts.



Inventory management

- Verification of inventory received
- Calculating price and quantity variances
- Automatic shipping process
- Calculation and posting of year-end adjustment entry



Receivables & Payables Management

- Automated monitoring of receivables
- Sending of reminders to customers for long outstanding balances
- Cross-checking between documents to verify the accuracy of payments
- Compilation of payables listings



Financial statement closing

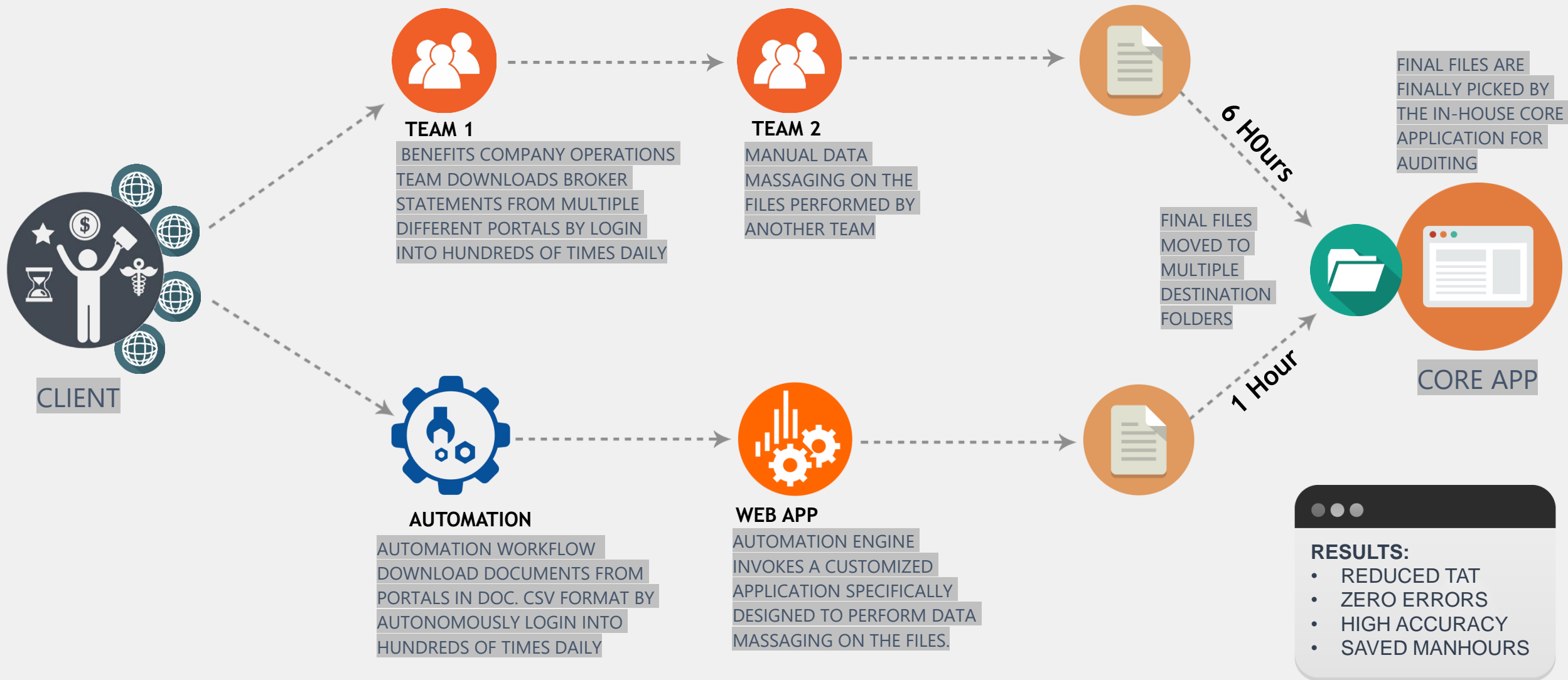
- Fair value adjustments and entries
- Collection of information for specific disclosures
- Financial statements and ratio analysis



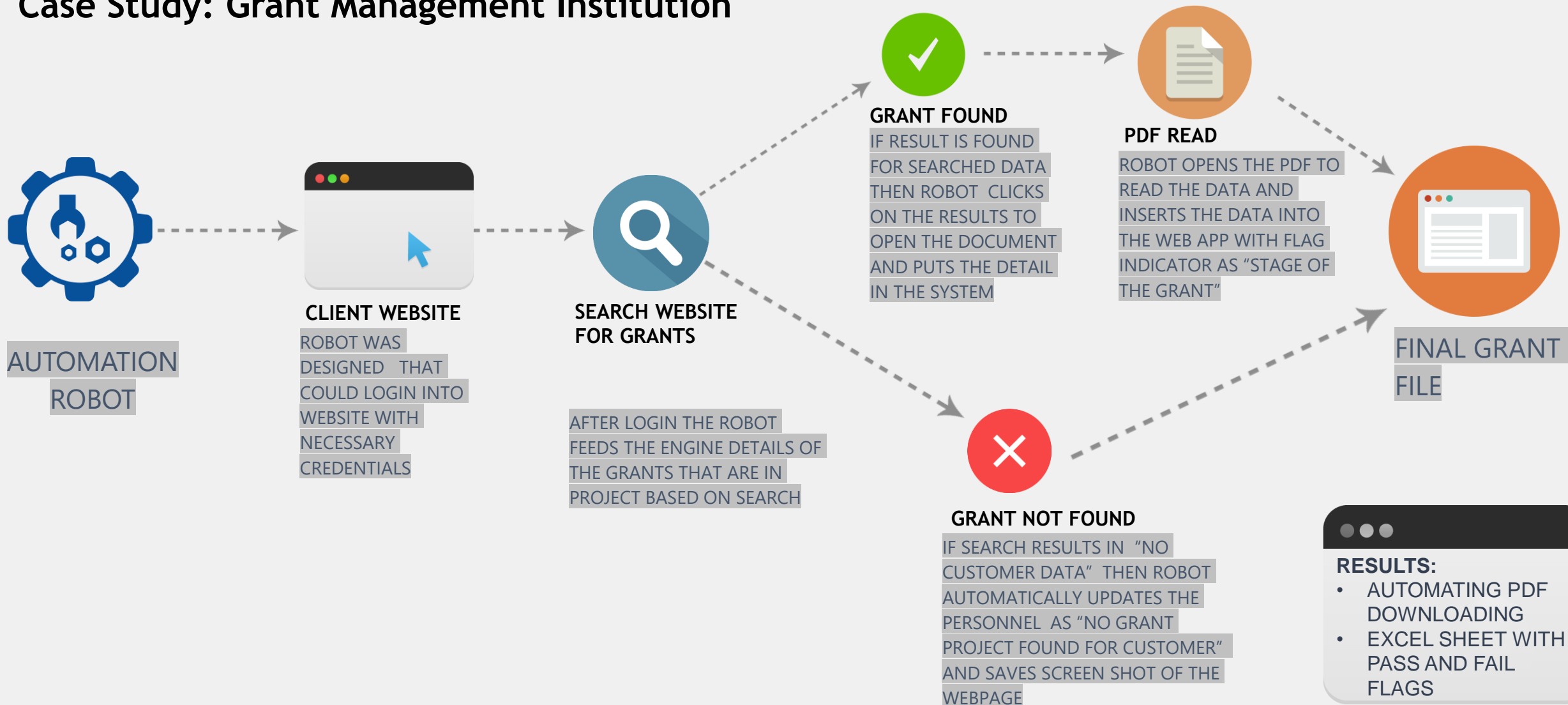
Tax planning and accounting

- Tax accounting and tax data management
- Tax accounting and analysis
- Tax accounting and preparation and review

Case Study: Insurance Benefits Service Provider



Case Study: Grant Management Institution



ACERO CROWNS

Company Overview

Acero Crowns – Pediatric Crown Manufacturer

Acero was created with smiles in mind. Whether giving or receiving, a smile can mean so many things. A job well done, a confidence boost or a reassurance that we, as dentists, have made a child's life forever better.

Our crowns are skillfully crafted from superior materials, labeled and presented in an industry-first, seamless tray system and at a price that is inclusive of every smile.

Acero Crowns were developed by two dentists in Dallas, TX, practicing in a busy Medicaid based office, purchasing an abundant supply of pediatric crowns. Pediatric crown pricing was escalating, despite decreasing reimbursement rates from Medicaid. Inspired by years of clinical experience, we began pursuing a vision of bringing a better pediatric crown option to the market.

Today, Acero Crowns is proud to offer a full line of the highest quality, preformed stainless steel and resin-covered stainless steel esthetic crowns to children.

Acero Crowns afford all dentists, especially those treating underserved children, the benefit of user friendly crowns line at reduced price points, without compromising on the quality.



ACERO CROWNS

Problem



- All Acero orders were coming in from distributors in email
- Couldn't easily track
- The process was completely manual
- Didn't easily know what crowns were selling
- It wasn't easy to know what inventory status was

- The process was time consuming and error prone
- There was no consistency in how orders were sent in
- Had to go through every email, interpret what the distributor was requesting
- Invoicing and payment was a similar challenge



ACERO CROWNS

Solution

- Automated the ordering, invoicing and inventory process
- Added all inventory into system
- Made it easy to see exactly what was in inventory and which products needed to be ordered to fill inventory gaps
- When an order comes into the system from a distributor the products in that order are automatically deducted from the current inventory
- The orders still come in through email, but the automation reads/interprets the emails and places the order.



ACERO CROWNS

Solution

- Email templates were setup to make it easy for the distributors to continue do business, create orders the way they were used to doing business
- Invoices were automatically created and send to distributor
- Analytics on what was ordered, inventory status, invoices, etc.

- There was an opportunity to take the automation one step further
- Impiger also automated the ship to labeling and tracking by integrating the system into Acero's shipping software, ShipStation
- Invoices were automatically created and send to distributor
- Analytics on what was ordered, inventory status, invoices, etc.



ACERO CROWNS

Results

- 100% improvement in efficiency
- Distributors love the automated notifications – Order received, Order in shipping, etc.
- Simple, fully automated, streamlined system
 - Easy to use, easy to train new employees
- Real-Time insights to inventory, orders, top selling products



Summary

Process-laden or paperwork intensive industries – like finance, healthcare, real estate, legal, government, education – are a particularly ***good fit*** for Workflow Automation & RPA

Workflow Automation is primed to ***interact with other applications*** so that businesses can be more fluid in how they work. Because processes aren't locked into one vendor or system, end-to-end workflows can be more flexible across applications.

Experts estimate that ***Workflow Automation will be a \$6B market by the year 2023.***

Key Takeaways

- ❑ An effective Workflow Automation roadmap should include a thorough analysis of the RPA opportunities, followed by an initial POC, with multiple checkpoints to plan and evaluate performance, benefits, and “lessons learned.”
- ❑ Establish a formal methodology to identify, quantify and prioritize RPA opportunities.
- ❑ Cycle times, volumetrics and operational/systems complexity are key drivers to the automation potential and business case.
- ❑ The RPA Operating Model requires an organization that is trained and focused on RPA design, operations and ongoing support.
- ❑ RPA can be deployed in a model where it is managed internally or by a development partner. An organization needs to determine which RPA deployment model fits its “DNA.”
- ❑ Automation can increase the effectiveness of your best, most valued employees, and provide a higher level of service to your customers, but be prepared that not everyone will embrace the change.

Homework

- ① Use these slides to help you identify a list of workflow automation candidates
- ② Assign a value of each candidate by complexity, impact, ease of implementation
- ③ Pick one. Segment a portion of your first project for a pilot



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