



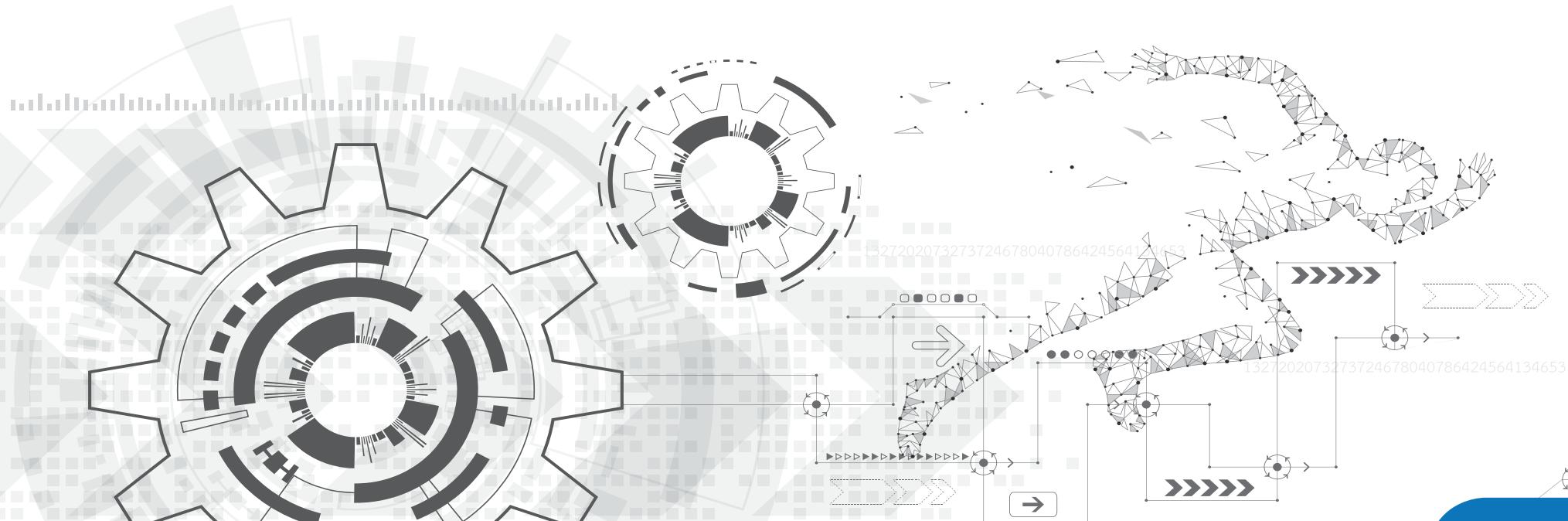
Roadmap to Success

Leveraging RPA to Drive Growth and Explore
New Opportunities for Efficiency



Introduction

Robotic process automation (RPA) is driving massive increases in productivity and innovation across enterprises worldwide. By allowing companies to multiply workforce productivity and utilize data more effectively, these technologies can help companies partially or fully automate nearly any task. From document processing to IT and accounting, RPA has had a major impact on almost every aspect of the way companies do business. As technologies mature and become a larger part of business operations, it is critical that every enterprise have an automation roadmap to stay competitive.



WHY RPA?

RPA can help companies improve efficiency, drive growth, and tackle new business opportunities. It encompasses any technology that allows processes to be performed automatically. This includes simple tasks, such as data entry, to more complicated tasks, such as IT issue identification and resolution. This allows companies to better leverage their workforces, make better use of existing systems, integrate with legacy applications, and use human workers to focus on high growth or more innovative tasks. This provides numerous advantages. It reduces labor costs and allows companies to engage in new opportunities and deliver customer-focused solutions. It also can allow enterprises to increase their throughput, giving them the ability to go after more business without adding headcount or ramp time. In labor-intensive areas, such as invoicing, accounting, financial processing, and IT, this can translate to sustained growth and greater market share at a lower cost.

THE IMPORTANCE OF AN RPA ROADMAP

Despite RPA's many benefits, it must be implemented correctly to drive business goals. Automation, like any major change, presents unique challenges. There are many common pitfalls that companies must work to avoid. In order to overcome these challenges, it is critical that RPA initiatives be guided by a comprehensive roadmap. This roadmap is not a simple to-do list, but a high-level plan that defines an overarching objective and captures milestones of enterprise-wide strategy. This allows it to be used as a communication tool to help build support for RPA initiatives and help business leaders learn how best to prepare for and leverage RPA.





Five challenges of implementing RPA in your organization

SELECTING THE WRONG TARGETS

Not all business processes can be fully automated. In many cases, tasks or data are too unstructured or abstract for RPA to perform the entire process. In these cases, implementing overly ambitious RPA solutions can create more difficulty and reduce productivity. By starting with low-hanging fruit and implementing hybrid robot-human solutions for more complex tasks, companies can build a solid automation foundation on which to grow.

RESISTANCE

RPA represents a major change in the way day-to-day processes are accomplished. This can often lead to resistance from business units that are used to doing things a certain way. To avoid this issue, it is critical that RPA leadership provide incentives for adopting new solutions and education to help employees understand that the tools will help them avoid repetitive work and increase accuracy in tasks, allowing them to focus on more high-value activities.

FEAR OF JOB DISPLACEMENT

Employees often fear that new automation tools will replace them. It is important that leadership make it clear that RPA serves primarily as a workforce multiplier, helping each employee be more productive. This will ultimately make the company as a whole stronger and open opportunities for better, more productive projects.

AUTOMATION AWARENESS

RPA is still a fairly new technology. As a result, there is often an “awareness gap” between RPA’s capabilities and possibilities and employees’ knowledge of what can be automated or how to do it. Working with an RPA vendor who can work with the automation team in a consultative way can help guide the company toward more high-impact RPA use and close the awareness gap.

LACK OF PLANNING

Many companies deploy automation solutions ad-hoc to meet specific business goals. This method often leads to uncoordinated implementations and silos of redundant tools that don’t fully leverage the power of automation to work across business unit boundaries. Coordinated solutions can share data and be managed through a centralized initiative that allows them to better meet overarching business goals.

Roadblock ahead?

Before you undertake an RPA implementation, it's important to understand which challenges you may face. A successful automation roadmap starts with setting realistic expectations.

The key phases of a successful automation roadmap

To overcome these challenges and implement RPA effectively, it is important to think carefully about how automation can best be implemented, executed, and leveraged. RPA is constantly evolving, and it is critical that the foundations of any implementation be strong, in order for solutions to be scalable and adaptable. To ensure that RPA is a success in the enterprise, companies must create a comprehensive roadmap.

The RPA roadmap should be divided into five key stages: plan, pilot, implement, scale and steady state. Each of these stages will build upon the previous one, so it is important that each step be solid. This helps companies prepare for the future and stay competitive as technologies and solutions evolve. By building a strong foundation for RPA, companies can rapidly innovate and achieve a positive ROI more quickly.

Plan

A comprehensive plan based on well-defined business objectives is important for any major initiative. This helps lay the foundation for the initiative and ensures that the goals of the project are aligned with the goals of the organization as a whole.

Understand RPA – The opportunities to leverage RPA are endless and can be implemented in many ways. It is important that the initiative leaders fully understand best practices for RPA and what it can and cannot do and how it aligns with business goals. A major component of this step is identifying the most suitable tasks for automation, since it is not suited to all processes. In general, the best candidates are ones that involve repetitive tasks with simple rules and that use a significant amount of manual resources.

- **Define RPA governance** – RPA ownership can be handled in many ways, each providing benefits and negatives. Which governance system the enterprise uses will depend on its particular needs and goals. A centralized governance structure can improve collaboration between business units and make it simpler to ensure compliance. This structure may make sense for highly regulated industries, such as those in the financial sector. A more decentralized approach in which each business unit implements RPA solutions on its own can improve innovation and allow for individual solutions for each unit, but may suffer from reduced organization and governance. In many cases, a hybrid approach with a centralized Center of Excellence (CoE) may make the most sense. The CoE can drive innovation and compliance standards, while allowing business units freedom to choose solutions that meet their own needs.



- **Build support** – Major initiatives need support from all key stakeholders, from business leaders to end users, to be successful. It is important that initiative leaders make the case for RPA early on and demonstrate how it can deliver value. After implementation, rigorous tracking of results and regular reporting out to key stakeholders is critical.
- **Choose the best approach** – There are many possible ways to implement automation in the enterprise and it is important that the company choose an approach that fits its needs. Narrow-focus automation can be implemented at the individual level for unique use cases or use cases that require high levels of human worker interaction. Automation also can be implemented at the backend to manage a high volume of mission-critical work across multiple teams. Creating a proof of concept can help companies determine what approach works best for them. The initial iteration also can be scaled up later to deliver more value.

Pilot

When a plan with support from all stakeholders has been finalized, the initiative can move onto the pilot stage. This stage will allow the company to demonstrate the value of RPA and learn how to implement it effectively with minimal risk.

Test on a small scale – Pilot projects should target low-hanging fruit that requires minimal investment. This allows the initiative to score easy wins and tests the ability of the enterprise to adapt without risking large amounts of time or resources. Examples include very repetitive data management processes, IT operations processes, and human resource processes such as form-filling for new employees.

- **Work with a trusted vendor** – It is important that the pilot project be in collaboration with a trusted vendor that can walk the team through the process and be ready to help if anything goes wrong. There are several important considerations when choosing a vendor, including product ease of use, experience in the field (which can translate to a more mature solution), implementation time and process (how quickly you can get up and running), scalability, pre-built automation actions, financial stability, transparent pricing, total cost of ownership, tool selection, support, and frequency of upgrades.





- **Review** – The pilot project should be viewed as a learning tool to help identify pitfalls and gaps in the plan. To this end, it is critical that the results of the project be carefully measured and reviewed. The team must decide whether the project met business goals, what areas can be improved, and how the plan needs to be adjusted for the full-scale implementation.

Implement

When the team has completed implementation of the pilot project and reviewed its successes and failures, it is time to move on to the full implementation. This is a critical step and it is important for the team to be prepared for new challenges when RPA is deployed at scale.

- **Set timeline and expectations** – The pilot project should allow the team to recalibrate their expectations and set more realistic benchmarks for success. Before deployment, the team should reconvene for an additional planning phase to learn from what went right and what went wrong in the pilot phase and add a timeline for solution deployment and assessment.
- **Work closely with your vendor** – The RPA vendor is a key partner in any RPA initiative. Its help and input are extremely important during the implementation stage. The team should work closely with the vendor to ensure necessary training and timely implementation. It also is important to review the deployment and ensure that the vendor is delivering everything that was agreed upon.

- **Conduct audits** – To improve solutions and identify areas of opportunity, it is critical for the enterprise to understand how solutions are performing. The team should regularly conduct internal RPA audits and focus on optimizing ROI. Underperforming solutions should be improved or eliminated, while effective solutions should be emulated and adopted in other areas of the business.

Scale

After the initial deployment, the RPA initiative team can begin looking for ways to improve current solutions and implement new ones. Automation is a rapidly evolving field with expanding opportunities. This makes it important that the enterprise continually scale its solutions to be more powerful and encompass a wider range of processes.

- **Look for new processes to automate** – An initial deployment may be focused on the most obvious targets for RPA solutions, such as document processing and data entry. However, there are many more areas where RPA can deliver significant benefits. Modern solutions can automatically diagnose and fix IT issues, deliver rapid customer service, and generate insights. This makes it important to regularly review business processes across the enterprise and identify new targets for automation.

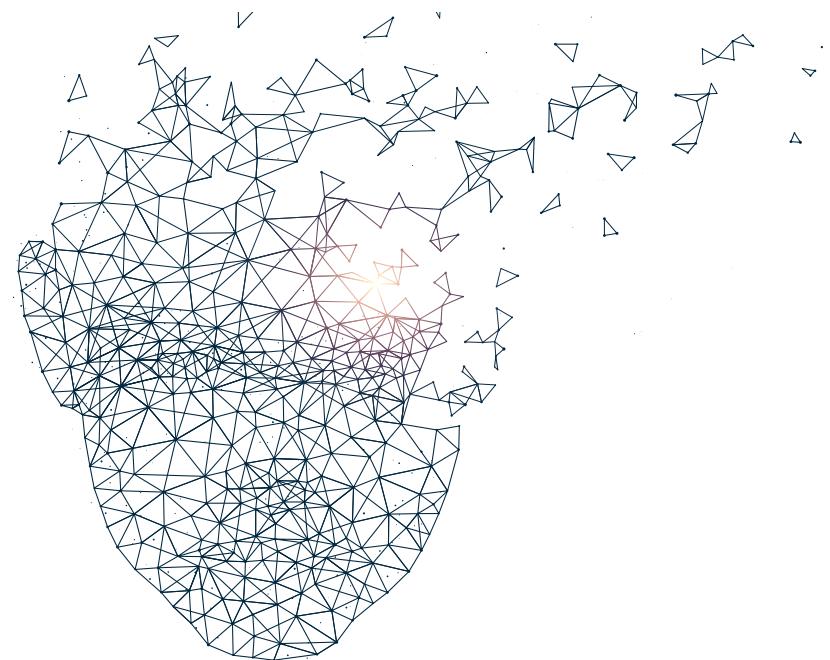
- **Build in cross-functionality** – Automated solutions provide significant opportunities for data sharing and collaboration across business units. Effective implementations can, for example, automatically forward customer service information about a customer looking for a new product to sales, allowing companies to more effectively leverage the data they collect. The RPA initiative team should regularly look for these opportunities and integrate them into existing solutions.

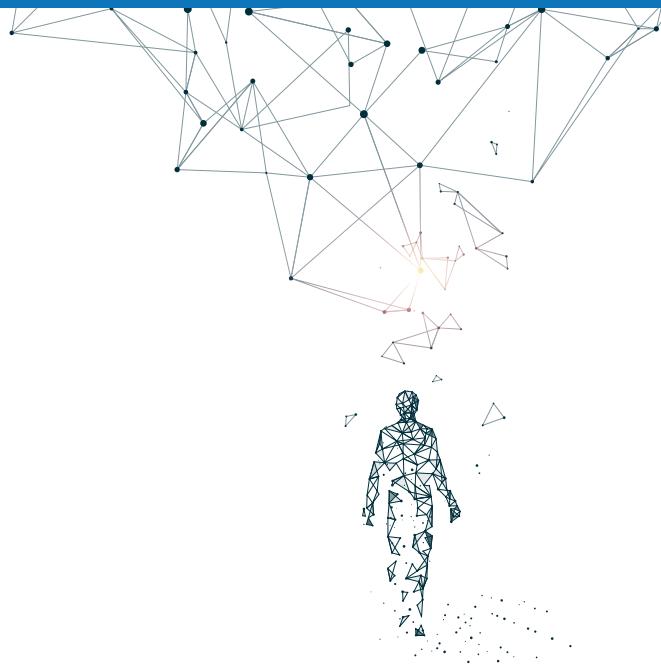
Steady state

As the enterprise adapts to the new RPA solutions, there may be a tendency for the team to stop innovating and looking for new ways to improve. RPA leadership in the enterprise must strive to avoid stagnation and constantly look to sustain and improve RPA systems by cultivating a culture of automation.

- **Manage and monitor** – The RPA CoE will continue to monitor systems throughout the organization and work to ensure RPA is sustained across the organization. Continuous testing with an integrated data gathering and analytics tool will allow the company to ensure ongoing optimization of processes, find additional automation opportunities, and determine the RPA solution's ROI.

- **Achieving RPA success** – Each organization must define what RPA success looks like and analyze the results of its solution to identify areas that can be improved. By analyzing, learning, and growing, the company can stay abreast of new solutions and continuously improve.





Conclusion

An RPA roadmap is not a static plan, but one that must continue to evolve and develop. By laying a strong foundation that aligns RPA initiatives with business objectives, companies can prepare themselves for the future and ensure that solutions are implemented as seamlessly as possible. Through initial planning, piloting, deployment, scaling, and maintenance, companies must identify their goals and ensure that they are on track to meet them. Each stage is an opportunity to learn and refine solutions to better meet the needs of the enterprise. This will help ensure that the company optimizes its RPA deployment and stays competitive as technologies evolve.

About HelpSystems

A leader in robotic process automation software and services, HelpSystems provides RPA software solutions to meet the needs of any organization, large or small. Building on over thirty years of expertise in automation and software robots, the HelpSystems Automate suite of products helps businesses increase operational efficiency and streamline mission critical processes in every department. More than 10,000 organizations around the world rely on HelpSystems to make IT and business users' lives easier, while keeping business running smoothly.

**Learn more about our RPA solutions at
www.helpsystems.com/rpa**

About IRPA AI

Founded in 2013, the Institute for Robotic Process Automation and Artificial Intelligence (IRPA AI) is an independent professional association and knowledge forum for the buyers, sellers, influencers, and analysts of robotic process automation, cognitive computing, and artificial intelligence. Our global network and advisory services offer leading-edge market intelligence, industry research, sourcing assistance, and events, as well as offering opportunities to learn and network with stakeholders across service industry functions.

To learn more, please visit www.irpanetwork.com

SMARTTECHnxt

About SmartTechNXT

We create simple, smarter automation. At SmartTechNXT we automate business processes with smart technology to unlock business value in manufacturing, finance, legal and people management. Converting your workforce to be citizen coders, freeing them to do rewarding tasks that win work.

www.smarttechnxt.com



About HelpSystems

Organizations around the world rely on HelpSystems to make IT lives easier and keep business running smoothly. Our software and services monitor and automate processes, encrypt and secure data, and provide easy access to the information people need.

www.helpsystems.com