HOW TO IMPLEMENT INTELLIGENT AUTOMATION

A simple guide for smart humans

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**HOW TO IMPLEMENT INTELLIGENT AUTOMATION**

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## SUMMARY
LET’S GET STRAIGHT TO BUSINESS

The pursuit of digitization and automation to replace manual business processes is nothing new. From the Lyons Electronic Office running the world’s first business application in 1951 to the arrival of contactless payments 10 years ago and the advent of chatbots today, organisations have recognised that some processes can be carried out more reliably and efficiently when they are automated. Even so, many businesses still depend heavily on people to carry out manual tasks for important business outcomes just think about the number of steps typically involved in receiving, processing and reconciling an invoice, updating a customer record across different applications, or inputting and interrogating a pipeline of sales leads.

What’s been missing up until fairly recently is the ability to automate those processes without changing the underlying systems and applications in use – which is often uneconomical, or just not an option. This has left people still tasked with manual processing, unfulfilling and repetitive work, and business operations that don’t always fulfil their potential or maximise productivity.

This whitepaper is designed to demonstrate how organisations can realise the benefits of intelligent automation in helping to achieve their ambitions – from reducing operating costs to driving revenue growth, and from improved customer experience to creating a happier workforce.
Technology is nothing without context so let’s frame the conversation by illustrating why people-based processes reduce organisational efficiency and the market dynamics currently at play.

THE PROBLEM WITH PEOPLE BASED PROCESSES
Almost perfect, but not quite

- Accuracy rates will never reach 100% as processes reliant on people are prone to error and inconsistency
- Repetitive, unimaginative work can lead to poor morale which negatively impacts productivity
- Employing a skilled person to carry out a necessary but low value task makes poor economic business sense
- Moving work to off-shore locations can reduce cost, but does not create greater efficiency – it simply delivers less expensive inefficiency
- Onboarding a new employee is high-cost - from providing equipment to time spent in training
- People work for around 1/3 or less of a 24-hour daily window – and are usually only productive for around 6 hours a day.
Inefficiency in human teams isn’t only at the task level. With skilled resources organised in departmental or functional silos, companies recruit or develop specialist skills to meet the demands of the business – whether experiencing growth, dealing with seasonal peaks or scaling back. With skills rarely immediately transferrable between teams (it would be unlikely, for example, that a financial controller and a sales manager would switch roles), this creates an additional layer of organisational inefficiency that directly impacts workforce productivity. Mass hiring when business demand picks up and then creating layoffs in a downturn is not good business practice.

The Shift to Service

The ability of any business to have a 24-hour online “shop window”, globalisation of commerce, and a new generation of digital native consumers has fuelled a demand for customers to choose the place and time that they want to do business. Online shopping enabled the transactional part of this process to be available round the clock, but what we now see is a requirement for – indeed an expectation – of 24-hour service. Organisations that can respond, react and resolve a customer’s requirement at a time that suits them have a distinct competitive advantage against those who rely on live agents during traditional office hours. One solution is to hire shift workers or configure ‘follow-the-sun’ customer service teams - but this can be prohibitively expensive.

The Ultimate Shift-Worker

It’s into this landscape that the emergence of Intelligent Automation has demonstrated the ability to deliver rapid and lasting business benefits. Using technologies like Robotic Process Automation (RPA) and Artificial Intelligence, software based “Virtual Workers” emulate humans by executing business processes in existing applications and systems using standard user interfaces. With a combination of defined workflow and simulated intelligence, the robotic workers can operate across functional and departmental boundaries, round the clock, at machine speeds and without ever succumbing to human error.
Risk & Opportunity

Some commentators have expressed concern at the potential impact of the combination of these two technologies, including the World Economic Forum, who used their 2016 Davos Report to make this ominous forecast: “Disruptive labour market changes, including the rise of robots and Artificial Intelligence, will result in a net loss of 5.1 million jobs over the next five years in 15 leading countries.”

Conversely, Forrester takes the view that “advances in automation technologies will mean humans increasingly work side by side with robots, software agents and other machines.” an approach commonly referred to as ‘co-bots’.

In fact, with the global pace of change, organisations that continue to rely on manual processing will lose their competitive edge.

As process automation enables large volumes of tasks to be carried out quickly and accurately, and in turn, reduces costs and improves efficiencies, Robotic Process Automation provides the foundation for organisations to achieve the nirvana of ‘outpacing the market’.

Lunch is for humans…and 6 other things a Virtual Worker will never need:

- A Desk to Work at
- Terms & Conditions of Employment
- An Excuse for Being Late
- Workplace benefits
- Management 1:2:1s
- Comfort Breaks & Holiday

WHAT IS ROBOTIC PROCESS AUTOMATION ANYWAY?

Robotic Process Automation (RPA) is a technology-based methodology where programmable software robots automate manual processes.

Software robots (referred to in this whitepaper as ‘Virtual Workers’) replicate what your employees do, using your current systems, tools and interfaces. This enables you to digitise the work, with Virtual Workers performing the same processes, with the same security and governance as you have today right down to using credentials and permissions in the same way a human employee would.

A SOLID FOUNDATION
Robotic Process Automation is the foundation layer of the Intelligent Automation stack. This layer is focused on very structured, highly repetitive, logical processes. Essentially the robot is the “do-er” that carries out tasks. It doesn’t “know” anything, but follows the pre-defined and logical workflow. If it encounters the unknown, an exception is flagged for human intervention.
MOVING UP THE STACK TOWARDS INTELLIGENT AUTOMATION

If RPA is the foundation layer of the automation stack i.e. the repetitive tasks; IA is the equivalent of the additional skills and experiences your employees have. These skills allow them to work with processes requiring decisions based on less defined workflow and more ambiguous information.

Organisations have many processes over and above the structured rules-based process that RPA alone can deliver. IA "skills" allow you to take unstructured data (free text emails, webforms, webchat etc) or electronic/scanned documents or application forms and extract data from them to form a coherent structure which will allow you to process in the correct manner.

Where RPA level Virtual Workers replicate the actions of people, at the Intelligent Automation level you can do much more; such as read and extract data from an invoice, or have an interaction with a chatbot that understands it is receiving a complaint from a client. What you can achieve will be dependent on your chosen automation platform.

With advanced platforms that offer more intelligent capabilities, Virtual Workers can utilise different capabilities to take semi/unstructured data. By building extensive rules, learning algorithms, regular expressions, pattern matching, exception handling and other variables into the automations; you can be more creative or intelligent with the problems you need to solve.

The below diagram illustrates the different levels of automation, from RPA which can be applied to a wide number of repetitive tasks within an organisation through the use of Artificial Intelligence to make self-determined decisions.

Common Terms in Intelligent Automation:

- Machine Learning
- OCR
- Cognitive Computing
- Artificial Intelligence
- Autonomics
- Chatbots
- ICR
- Natural Language Processing
THE AUTOMATION JOURNEY
Moving up the stack towards intelligent automation

Below is an infographic that demonstrates the percentage of use cases which can be automated by RPA & IA technologies

**Artificial Intelligence <10%**
Big data, using analytics to give insight and make self determined decisions

**COGNITIVE MACHINE LEARNING OCR/ICR 15-20%**
Manage unstructured data through OCR/ICR, Machine Learning & Natural Language Processing (NLP)

**CHATBOTS 10-15%**
Interaction with users through automated chat bots

**RPA 60-70%**
Repetitive, rules based, high volume actives
The theory of automating processes to achieve material efficiency gains and supportive analyst comments can be compelling, but the best way to express what’s possible is via real-world use case scenarios. Below are six RPA use cases as delivered by the thoughtonomy team, full details are available in the document 6 Real World Use Cases of Robotic Process Automation

**Business Function: Managed Services**
**Use Case:** Improve efficiency and customer satisfaction

**Outcome**
- 2-week deployment
- 83% reduction in execution time
- $1m productivity savings per annum

**Sector:** Managed Services

**Business Function: IT & Infrastructure Support**
**Use Case:** Faster time to deployment

**Outcome**
- 3 x fewer FTEs per Virtual Worker
- $250k annual productivity savings
- 24/7 service operations

**Sector:** Technology

**Business Function: Data Migration & Management**
**Use Case:** Efficiently and accurately manage data

**Outcome**
- 12 x reduction in FTEs
- $200k cost savings within 3 months
- 3-month backlog cleared within weeks

**Sector:** Business Process Services
“Most organisations still have a lot of routine processes that use employees to manually manipulate structured and unstructured data. The reason these processes have escaped automation until now is a mélange of traditional practices, cost of integration of systems and lack of organisational discipline.”

*Gartner, Use Cases for Robotic Process Automation: Providing a Team of ‘Virtual Workers’*

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**WHAT THE ANALYSTS SAY**

Business Function: **Human Resources**  
Use Case: **Improved workflow and collaboration**

Outcome  
90% reduction in processing time  
Reduced risk  
Improved employee satisfaction

**Sector:** Outsourcing Services

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Business Function: **Digital & Online**  
Use Case: **Improve customer experience**

Outcome  
Multi-million-pound cost savings  
15% reduction in appeals requiring re-submission  
Significantly improved customer satisfaction

**Sector:** Public Sector

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Business Function: **Back Office Administration**  
Use Case: **Optimise resources**

Outcome  
12 x FTE reductions  
10x faster execution  
$1.5m projected annual savings

**Sector:** Financial Services

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“For many companies successful Robotic Process Automation and Intelligent Automation projects have delivered significant benefits that positively impact shareholder value. Accenture reports that the benefits of automation include: reducing costs by 80%, saving time by 80-90% and reducing errors*.”

PROCESS AUTOMATION, NOT REPLACEMENT

A major challenge with process change is the management of how that change affects people. If you take Customer Relationship Management (CRM) software as an example, significant training is required to bring employees in line with a new way of working. Whilst their job title may have remained the same, the company’s expectations of how employees carry out their work is different and it’s not always easier. It is also notoriously difficult to enforce data entry rules – some people will go out of their way to avoid ‘mandatory fields’ or process steps that they feel get in the way of the parts of their job they enjoy most (and will therefore prioritise).

With process automation, the issue of change is avoided and business as usual can be preserved - and even enhanced in cases where you are able to free employees from the least enjoyable part of their job. Replicating existing processes is a good philosophy to adhere to when investigating RPA use cases as it avoids the delay caused by discussion or disagreement about change control.

Protecting existing investments
Just as RPA is not about replacing an organisation’s processes with new ones, it’s also not about replacing current technology investments. RPA fills in automation gaps and removes unnecessary manual tasks to optimise and enhance current processes – therefore driving further ROI within the existing infrastructure.

The argument for replicating existing processes:

- No lengthy process redesign programmes
- Proven way to successfully perform the task
- Conform to a compliance requirement or legislation
- Can be deployed alongside human workers
- Won’t require application changes
- No changes to existing applications so no technical lock-in
A FASTER ROUTE TO MORE EFFICIENT PROCESSES

Introducing change to an organisation via business process software and a change in the way in which the workforce is required to approach tasks introduces short to mid-term disruption that costs businesses time, money and introduces risk. Using process automation significantly shortens the time required to introduce change and greatly reduces disruption to the business.

<table>
<thead>
<tr>
<th>Steps required for traditional process change</th>
<th>Time Frame: Months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request change</td>
<td></td>
</tr>
<tr>
<td>Define high-level parameters</td>
<td></td>
</tr>
<tr>
<td>Make change request</td>
<td></td>
</tr>
<tr>
<td>Review change request</td>
<td></td>
</tr>
<tr>
<td>Create impact study</td>
<td></td>
</tr>
<tr>
<td>Define detailed parameters</td>
<td></td>
</tr>
<tr>
<td>Document options and changes</td>
<td></td>
</tr>
<tr>
<td>Finalise impact study</td>
<td></td>
</tr>
<tr>
<td>Create response documentation</td>
<td></td>
</tr>
<tr>
<td>Agree final change request</td>
<td></td>
</tr>
<tr>
<td>Build in test</td>
<td></td>
</tr>
<tr>
<td>UAT in test</td>
<td></td>
</tr>
<tr>
<td>Build in production</td>
<td></td>
</tr>
<tr>
<td>UAT in production</td>
<td></td>
</tr>
<tr>
<td>Final sign-off</td>
<td></td>
</tr>
<tr>
<td>Go live</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Steps required for process automation</th>
<th>Time Frame: 5-15 Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use RPA to replicate what your people do</td>
<td></td>
</tr>
<tr>
<td>Test</td>
<td></td>
</tr>
<tr>
<td>UAT and sign off</td>
<td></td>
</tr>
<tr>
<td>Go live</td>
<td></td>
</tr>
</tbody>
</table>

And if you don’t like it

Whilst we fundamentally believe that RPA introduces immediate efficiencies, an additional benefit of this approach is that if you don’t like it, you can simply put a person back in control of the process. No awkward re-engineering your way back to people-based services.
BUILDING A COMPELLING BUSINESS CASE FOR AUTOMATION

In many cases, Robotic Process Automation (RPA) is looked to as a cost-cutting exercise, and while it is important to make sure that any project comes with a strong ROI, it makes sense to consider the benefits that RPA can deliver over and above saving money. RPA enables you to build a business case to the board that will support (and perhaps even set) a number of strategic initiatives.

1. IT JUST WORKS
   Not only does RPA yield near real-time data in many instances, the “no-code” approach - whereby business experts, rather than IT developers configure process workflows - means it’s much quicker to build and deploy than traditional solutions, often hours and days instead of weeks or months (see table on the previous page). Interfaces are generally easy to learn and most don’t rely on the IT function’s limited resources.

2. NO RIP & REPLACE
   A leading RPA solution will complement, rather than replace, existing systems. With the ability to access data from multiple, disparate sources such as legacy, ERP and external systems, RPA doesn’t require re-engineering of old processes. In some cases (especially where the manual process is replicated by the robot), this also has the added benefit of fitting in with your compliance, security and governance programmes, which should allow the company to implement automation more smoothly.

3. INHERENTLY ADAPTABLE
   To be successful, a RPA solution must be adaptable to a variety of business needs and scalable to enterprise size. This helps a business to smooth out peaks and troughs whether seasonal or hourly.
4. A TRUE DRIVER OF EMPLOYEE SATISFACTION
RPA releases employees from repetitive tasks allowing them to apply their skills to scenarios that require human skills such as the ability to empathise, negotiate and deal with ambiguity. A consequence of this is the potential to lower staff turnover, as people who are freed from repetitive manual tasks to focus on more interesting “work” should be happier.

5. A SYSTEM THAT NEVER SLEEPS
With a workday that never ends, RPA maximises the ROI available from bolstering efficiency. With no need for holiday, no illness and the simple application of a little code rather than training to tweak performance, you’ve got your very own 24-hour workforce.

6. ELIMINATES HUMAN ERRORS
Automated technology eliminates human errors and completes processes the same way, every time – resulting in more accurate and reliable outcomes.
CRITICAL SUCCESS FACTORS TO ACHIEVING INTELLIGENT AUTOMATION

8 steps to get you there

1. GAIN AGREEMENT ON WHAT SUCCESS LOOKS LIKE

As Stephen Covey wrote in his book “7 Habits of Highly Effective People”, the best outcomes are delivered when one starts with the end in mind.

Knowing that intelligent automation will help your business is one thing, making sure that you get backing and buy-in to roll it out throughout your business is another. Being clear on what you want to achieve makes it easier to measure performance, manage the team and celebrate success.

It may be that success is measured in a clear metric “a 30% reduction in operating cost” or a “50% improvement in throughput”, or it may be less well defined point of value - hours saved, improved operational performance, reduction in errors, improvements in customer satisfaction. Whatever “good” looks like it should be something understood by the internal team, and shared with vendors and service providers collaborating on the project.

Typical success criteria:

- Replacing ‘x’ amount of job roles
- Effective task or process replication
- Giving back ‘x’ amount of time to the organisation
- Increased data accuracy / process execution
- Increased customer satisfaction
- Reducing the amount of time to process
- Minimal build & release timescales
- Successfully handling exceptions/unknown conditions
2. IDENTIFY AUTOMATION CANDIDATES

Some automation initiatives are driven by a desire to improve a specific process or activity, but for most – and particularly those who recognise the value of an intelligent automation platform as a digital workforce working across business functions and departments – building an automation roadmap helps to prioritise the activities which will benefit most from automation, and those which deliver the quickest win. Those which feature in both categories generally become the start point for the automation journey.

Since not all technology is created equal, the ideal candidates for automation may vary depending on the chosen product or platform. Broadly speaking, the following process characteristics are useful in deciding which processes are ripe for automation.

<table>
<thead>
<tr>
<th>Structured process</th>
<th>Could a set of task instructions be easily given to a new employee? If processes can be defined and communicated to new workers, they are typically good automation candidates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clear decision logic</td>
<td>Can the decision points be defined and documented? Automations follow defined workflow and rules based logic</td>
</tr>
<tr>
<td>Defined or definable workflow</td>
<td>Is there a workflow guide or runbook? An existing runbook or workflow is not essential but assists the speed to build the automation</td>
</tr>
<tr>
<td>Uses multiple application or tools</td>
<td>Does execution require the use of multiple systems and/or applications? Processes using humans as the interconnection between systems make good candidates for automation</td>
</tr>
<tr>
<td>No emotion or subjectivity</td>
<td>Is there room for ambiguity or feeling in the process? Processes requiring human judgement are not typically good candidates for hands-off automation. They may still be suitable for assisted automation</td>
</tr>
<tr>
<td>Prone to human error</td>
<td>Is there a high rate of error or high impact if errors occur? Automated processes will operate with zero human error</td>
</tr>
<tr>
<td>Unfulfilling</td>
<td>Is the process repetitive, mundane and unsatisfying, does it involve cutting and pasting? Removing low-end work improves employee satisfaction by making better use of human skills</td>
</tr>
<tr>
<td>High volume / low to medium complexity</td>
<td>Is there a high volume of activity? This will help to calculate the return on investment for the solution</td>
</tr>
<tr>
<td>Low volume / high complexity</td>
<td>Is there a lower volume but high complexity/long execution time? This will help support a return on investment for the solution</td>
</tr>
<tr>
<td>24-hour operation</td>
<td>Does the process (or could the process) run 24 hours a day? Virtual Workers can run 24/7 so are well suited to processes requiring 24-hour operation – or those that could be 24/7 given an unlimited workforce</td>
</tr>
<tr>
<td>Legacy or external applications</td>
<td>Does the process use legacy applications and/or external systems (i.e. owned by a provider or customer?) Automation can manage processes using legacy or external systems which could not be automated using other methods</td>
</tr>
<tr>
<td>Part automation</td>
<td>Is there a volume of repetitive and defined work which requires human judgement to initiate, approve or define? Processes do not need to be 100% automated to deliver benefit and often the Virtual Worker can be configured to do the bulk of the work, based on human initiation, approval, or authorisation</td>
</tr>
<tr>
<td>Document data extraction</td>
<td>When dealing with documents or application forms, are they standard formats or free text?</td>
</tr>
<tr>
<td>Scalability</td>
<td>Is the only way to scale the process by hiring more people? Or does the process have peaks and troughs in work?</td>
</tr>
</tbody>
</table>
3. START, START SMALL AND SCALE FAST

Some of the differentiators of RPA based automation are in the vastly reduced time to value compared with other forms of digital transformation. Taking full advantage of this will be undermined by lengthy product evaluation cycles, or weeks and months spent deciding whether RPA is the right solution. With non-invasive deployment, it is a technology that is incredibly easy to evaluate in action, because if it doesn’t prove its worth, stopping the use is as simple as turning it off.

There may be a tendency for organizations to want to run Proof of Concept exercises, standing up development applications to build processes into as one would in a standard IT project. But RPA is not like other technologies, and in most cases, this approach is of little value and a can be a waste of time and resource. A far better approach is to run a Proof of Value project – taking one or two real use cases and deploying production automation into that domain. This will provide the point of proof (or not) that the technology can deliver benefit, but also a real world metric on the benefit delivered, be it in hours saved, speed of execution, reduction in errors and rework or more. Furthermore, it allows the business to approach the exercise with a positive attitude – an expectation of success – and in the knowledge that once success is proven, the process can remain in production. Thus, the investment in a POV is not a waste of time and effort, but the start point of the automation journey.

At the start of the journey, it’s unlikely that an organisation will have answered all of the questions about how it would prepare itself to scale out its adoption, but once proven – or in anticipation of success, there are several important considerations for ongoing success.
Intelligent Automation should be considered a business initiative, and as with most initiatives, requires support at all levels in order to ensure it has the attention, time and focus of the organisation.

When seeking an Executive Sponsor it’s important to be clear about the expectations of the role, and its importance in the success of the overall project. Here’s what your Executive Sponsor needs to do:

- Provide clear direction for the project and how it links with the organisation’s overall strategy
- Ensure the project is on time, on budget and on scope
- Secure project resources
- Provide feedback on status reports
- Ensure the necessary stakeholders are involved across the organisation
- Champion the project at the executive level to secure buy-in

“One of the most common reasons why projects fail is a lack of executive sponsorship and management buy-in.” KPMG Management Survey
5. CHOOSE THE RIGHT OPERATING MODEL

The decision on which model to adopt will be familiar to most organisations; here we discuss the pros and cons of both the federated and consolidated approach.

**FEDERATED MODEL**

In the federated model, each business unit or functional team is responsible for designing and implementing its own process automation projects.

**BENEFITS**
- Low cost to set up in each business unit
- Rapid alignment and adoption as each business unit knows its own processes and exceptions
- Works well where the operations team retains ownership and responsibility for shared robotic process automation capability

**CHALLENGES**
- Lack of centralised control
- Ability to share knowledge and best practice with the rest of the business
- Level / knowledge of IT best practice and governance

**CENTRALISED MODEL**

In the centralised model, the project is designed, delivered and managed by centralised resource in conjunction with the relevant line of business teams.

**BENEFITS**
- Low cost to set up
- Ability to target areas according to impact on business strategy
- Easy to share knowledge and best practice

**CHALLENGES**
- Requires process to agree priorities across the business
- Reliance on IT resource that is not close to the functional process
- Maintaining positive relationships with teams whose projects are not prioritised

Whichever model is chosen, if there are multiple individuals involved in building and testing automations, it will be very helpful to build an approach to sharing developed automation in whole or part, in order to support consistency in approach, and to allow for re-use of common components. Some platforms include the ability to share and collaborate on automation components, or repositories which facilitate and encourage sharing and collective learning.
6. BUILD THE RIGHT TEAM

There are a number of critical roles in an automation team – and while an individual may assume multiple responsibilities early in the program, as the team grows they may become full time roles or teams in their own right.

Typical roles and responsibilities are highlighted below. Each will require a different level of understanding and skills with the automation tool, so develop a training program that ensures role based formal education, ideally with certification or accreditation of skills to validate capability.

**Business Analyst**
Responsible for identifying and scoping processes to be automated
The Business Analyst will either work as an individual to identify, assess and prioritise client/inter- nal processes for their suitability for automation.

These individuals will be able to assimilate the specifics of a process, working with SMEs or process owners to extract a granular list of steps that describe how the process is followed today.

Upon identification of a suitable process the individual will be responsible for compiling the process and capturing metrics in the form of a process definition document which explicitly depicts the actions the virtual workforce should take.

**Automation Designer**
Development & build of automated processes
The Automation Designer will be responsible for creating, updating and retiring automations which are executed by the Virtual Workforce.

Translating the steps identified by the Business Analysts these individuals will work with the designer to build the Application Objects and Processes which will then drive downstream applications as though they were a human. Automation Designers will apply Enterprise Robotic Process Automation (ERPA) best practices to the solutions they build, working with the exception handling team to enhance the automations through exception reduction.

Automation Designers do not need to be from a development background, but should be logically minded and take a methodical approach to analysing problems.

**Automation Tester**
Testing and release of automated processes
Alongside the Automation Designers, Automation Testers manage the test and release of production automations. It is recommended that these resources are separate from the Automation Developers to maintain independence of testing and review, though good practice is to alternate development and testing resource between these roles on a periodic basis.
7. COMMUNICATION IS KEY

Because it will impact the way an organisation’s workforce operates, Intelligent automation will have an impact on staff, and there are those who will feel uncertain, or even fearful, of the changes it may bring. An important factor in ensuring dispelling concerns and gaining the support of staff at all levels is clear and regular communication.

It is important to share the rationale for the initiative, highlighting the benefits for the business, its customers and its staff. Equally, reporting regularly on the benefits being realised will help to build momentum, and having focused on quick wins will allow successes to be shared early and help you get others on board. You are likely to see an almost instant result from the chosen automation that you implement, so make sure you provide early and consistent communication back to the sponsor and other stakeholders (including the SMEs that helped build the processes with your automation team). Quickly address any changes that need to be made to the automation and make sure it aligns to the success criteria. If there are changes in approach or improvements that are highlighted, ensure these are fed back to the automation team – especially important in a federated model.

For examples of the kinds of outcomes that you can expect, or ideas for the success criteria that you should seek to achieve, refer to the sections ‘Real business processes – real results’ and ‘Gain agreement on what success looks like’ in this document.
8. BUILD A CENTRE OF EXCELLENCE (COE)

An automation CoE is an organisational team that provides a central function for the delivery of automation goals to the business. It sets out and drives the automation strategy that aligns with the overall business objectives, while supporting the needs of the other business units and functions to achieve their goals.

**Key responsibilities of a CoE**

- Designing and establishing a roll out plan with effective governance, security and controls.
- Ensuring focus and prioritisation on delivering the “high value” projects.
- Coordination and control of projects and resources against objectives rather than the line of business that makes the most noise – the CoE should be the unbiased function of the business that determines the timeline of automation roll out.
- Reporting outcomes and benefits – what have the automation projects delivered?
- Knowledge share and skills – by having a focal point for the organisation’s skills, the CoE can assess the methodologies and approach that needs to be taken to the design, build, implementation and maintenance of the automations. This will allow you to embed best skill sets in the business, who are able to develop a community of skill sets to meet the organisational needs.
- Resource management – Given the recent demand for RPA and IA skills (across all skill sets – design, build, implementation and maintenance) an organisation will need to consider the management, development and potential impact of departure of these highly sought-after individuals.
- Supplier management – There have been cases where individual departments have different technology, leading to problems with cost and support management. Having a CoE to manage purchasing and support requirements can help with supplier relationships and contract negotiations.
- Challenge the current “ways” of doing business including encouraging staff to identify and propose automation candidates.
THE THOUGHTONOMY BEST PRACTICE MODEL

Whilst all organisations will have their own unique best practice, our clients find the Thoughtonomy best practice methodology for the creation of automated processes a useful starting point.
SUMMARY

Advances in Robotic Process Automation technology plus market forces and society’s approach to living a more digital lifestyle have combined to create a perfect opportunity for organisations to better serve their employees, stakeholders and customers.

Our guidance, as illustrated in this whitepaper, can be summarised as follows:

- **Set your context** – understand the capabilities and ambitions of your business, the scope and desires of your market and the available opportunities
- **Discuss the proof points** – with many organisations already on the path to Intelligent Automation, it’s possible to review evidence and model the outcomes for your business
- **Build a compelling business case** – taking into account the above, you’ll be able to create a business case that speaks to the board, and the needs of the business
- **Map out your critical success factors** – to create a path towards Intelligent Automation that works for you

With RPA forming a solid baseline, it’s become possible to incorporate machine learning, cognitive computing and AI to rapidly move to a position of Intelligent Automation with very little disruption to the business. The question now becomes not whether Intelligent Automation is appropriate, but when and how your organisation will deploy it, and what you’ll do with the efficiencies that you’ll gain.
ABOUT
THOUGHTONOMY

Our belief is that deploying automation should be easy. That’s why our technology focuses on automating the way your staff work today. It’s not a replacement for the tools or systems you use, it’s an automation platform designed to fit in to your processes and systems in place of manual activity. No process re-engineering, no tools replacement, no integration, no coding and no big change programs.

Our award winning SaaS automation platform takes the support and business processes and the system and tools interactions typically performed by humans, turns them into automation procedures and delivers them using Virtual Workers who emulate human staff. The Virtual Workers are “trained” how to use the systems and applications, procedures are replicated in process workflows, and the virtual workforce execute them on demand or against a predefined schedule.

Thoughtonomy is the leading global provider of RPA Software-as-a-Service and has automated many processes across sectors including Technology, ITO/BPO/Finance/Telco/Public Sector and Healthcare.

Thoughtonomy – accelerating automation.

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