

START YOUR RPA

JOURNEY WITH THIS FIRST STEP

Our expert team hosts a Kickstarter meeting when potential new clients want to explore their projects and processes that might work best with Robotic Process Automation technology.

This worksheet will help you assess your own projects and processes, as well as help you gather information that can be used during our Kickstarter session.

If you want to learn more about RPA, you can [download our infographic](#) or visit a host of content on our [website](#).

Want to schedule your own Kickstarter session with our RPA experts? [Email us](#).

1) Business Process Potential for RPA

A) What is the process you want to consider for intelligent automation?

i) Who is the customer?

ii) Are there any notable prerequisites/preconditions?

B) Why is this process important? What is the value of this process on operations, customer care, profit, etc.?

C) How does the process work?

i) What are the steps and what are the conditions that drive those steps?

ii) Be prepared to go into more depth.



2) Process Delivery Components

A) What Is needed to execute/deliver this service?

- i) Technology and systems
- ii) Data
- iii) People (aka role/positions)

B) What are the bookends?

- i) What kicks the process off?
- ii) What is the ultimate output?



3) Key Performance Indicators

A) How do you know that this process is successful?

B) What metrics indicate success?

C) How do you know that this process is delivering the expected value?

D) In what ways is this process falling short of expected or desired goals?

E) What impediments have kept this process from reaching its potential?



4) Barriers and Bottle Necks

- A) As you look at this process, where are the “break points” and bottlenecks that hold the process back or cause it to fail?
- B) Look at the map that you made of your process under the first question. Where to things break down and get in the way of a streamlined, efficient process?
- i) Quality due to human error?
 - ii) Waiting caused by busy resources?



5) Future State

- A) What would improve performance outcomes for this process look like?
- B) Let’s visualize a future state process that could incorporate digital assistants.
- C) What would an ideal future state process look like?
- D) Use the map of your process and the areas you’ve identified for improvement as a guide



6) Scope & Sizing

- A) What would it require to achieve the future state vision?

- B) What would be in an initial (Start Simple!) improvement that could have a measurable and meaningful impact?



7) RPA Readiness

- A) Is your process or system ready for intelligent automation?

- B) Is your process clearly documented and easy to explain?

- C) What discrete rules govern your process?

**NOT SURE IF
YOUR PROCESS
IS READY
FOR RPA?**

Our process analysis experts can assist with ensuring that your process is RPA-ready – standardized, using best practices and without errors or unnecessary steps.

Automation is only useful when it streamlines a stellar process or system. We can help you become “RPA Ready.”