

Identify potential use cases where your department, business unit, or organization can reap the benefits of Robotic Process Automation.

At its core, RPA can help with any high-volume, business-rules-driven, repeatable process.

To see all of the potential use cases, first, you need to understand the overarching capabilities of RPA robots. They are capable of mimicking human user actions. They can log into applications, move files and folders, copy and paste data, complete forms, extract structured and semi-structured data from documents, scrape browsers, and much more.

The benefits of RPA include significantly improving accuracy, compliance, efficiency, and scalability. In that light, the question emerges around where you need those characteristics, either, as a solution to a problem or as a strategic priority for growth and innovation.

Do you have any operational or strategic priorities that require automation?

If so, what are those directives? (i.e. streamline fulfillment administration, eliminate errors in order processing or account reconciliation, cut inventory reporting time)



What are the top five critical processes that your organization (department or business unit) relies on? (i.e. financial transaction management, customer onboarding, inventory management, or customer support requests)

Where are there broken, inefficient, or inadequate processes or workflows that are hurting key performance indicators? (i.e. credit limit requests take 15 minutes each and are rejected due to errors 30% of the time)



RPA Use Case Ideas Across Industries

The following shows potential use case areas for RPA across industries to give you more ideas of where RPA could fit.

Healthcare

- Claims Processing
- Patient Eligibility
- Physician Reporting
- Record Storage

Manufacturing

- Automating ERP
- Logistics Data
- Data Monitoring
- Pricing Comparisons

Technology/Software

- App Integration (API)
- Hardware Testing
- Software Testing

Financial & Banking

- Data Validations
- Data Migrations
- Report Creations

Retail

- Form Population
- Process Verification
- Legacy Integration
- Loyalty Analytics

Telecommunication

- Data Consolidation
- Data Extraction
- Call Routing

Which organizational functions do you think require enhancements to compliance, accuracy, and efficiency?

Where could improvements have the greatest impact on your bottom-line, your profitability, and customer/stakeholder/board expectations?

Think of these areas to narrow down your list:

- Finance & Administration
- Procurement
- Human Resources
- Marketing & Sales
- Product/Service Management
- Delivery & Customer Service
- Risk Management
- Information Technology & Security

Prioritizing Use Cases based on ROI

A [2017 Forrester report](#) offered a matrix, indicating potential use cases by level of risk and change management required against ROI potential. It's a useful way to take another look at what you've uncovered so far for your own use cases.

Areas with greatest ROI:

- Automation of market research processes
- Customer communication and self-service
- Order processing and management
- Regulatory and compliance reporting

Areas with low cost and medium ROI:

- Automation of document validation and categorization
- Business account onboarding
- Transaction duplication

Areas with significant benefits and higher investment:

- Automation of marketing campaigns
- Financial planning
- Internet application processing

Areas with significant investment and unproven benefits:

- Fraud chargeback processing
- Risk monitoring
- Check approvals

How does this information change your potential use case priorities?



As you look at your answers so far, where do you think your organization (department, business unit) would be more “on board” with RPA and its potential benefits?

Where do you see potential resistance to automation technologies and more need for organizational change management?

Starting Your RPA Journey

When reviewing your needs and identifying potential use cases, it's important to prioritize processes for automation by considering their potential outcomes, weighing the trade-offs between investments, risks, and rewards, as well as determining the areas where the benefits could have the greatest impact.

While this Use Case Planner Tool will help you identify functions or high-level processes to consider for automation, it will take further analysis to determine the quantifiable potential for each use case.

We can help you vet the use cases you've identified and determine what are the top priorities for your vision of value from RPA. To schedule your Whiteboarding Session, [contact us](#).