

Identifying and Quantifying High-Value, Quick-Win RPA Projects

A guidebook to discover and vet measurable automation outcomes.

sdic partners

Performance Enabled.

Contents

Introduction	3
Two Types of RPA - Assisted and Unassisted	4
Tasks Appropriate for RPA Technology	5
SDLC Partners' Process for Gathering & Vetting	
Client RPA Projects	6
Discovery Steps.....	6
Client Case Studies	8
Enterprise Functional Areas	9
Use Case Discovery Worksheet	10
Create a List of Potential RPA Projects	11
Feasibility Use Case Scoring	12
Conclusion	13

Introduction

Gartner defines Robotic Process Automation (RPA) as, “a noninvasive integration technology used to automate routine, repetitive, and predictable tasks through orchestrated UI interactions that emulate human actions.”

RPA is the use of software bots at an enterprise scale to automate transaction processing, data manipulation and cross-platform communication to improve process execution, quality and auditability.

Intelligent automation, and in particular RPA, includes methods that enable organizations to maximize human resources and deliver more of what they create to more people. Essentially, anywhere that there is repeatable, high-volume processing driven by timeliness and accuracy pressures, RPA can yield value.

Two Types of RPA – Attended and Unattended



Attended:

Bots are deployed on an individual desktop and the human worker carries out certain aspects of the task, relying on the bot to do other, more cumbersome, or technically-complex parts of the process.



Unattended:

Bots are deployed on a centralized server, allowing manual control. This type of RPA solution can automate end-to-end tasks and workflow scheduling from a central point of control.

Two Other Types of RPA – Autonomous and Cognitive



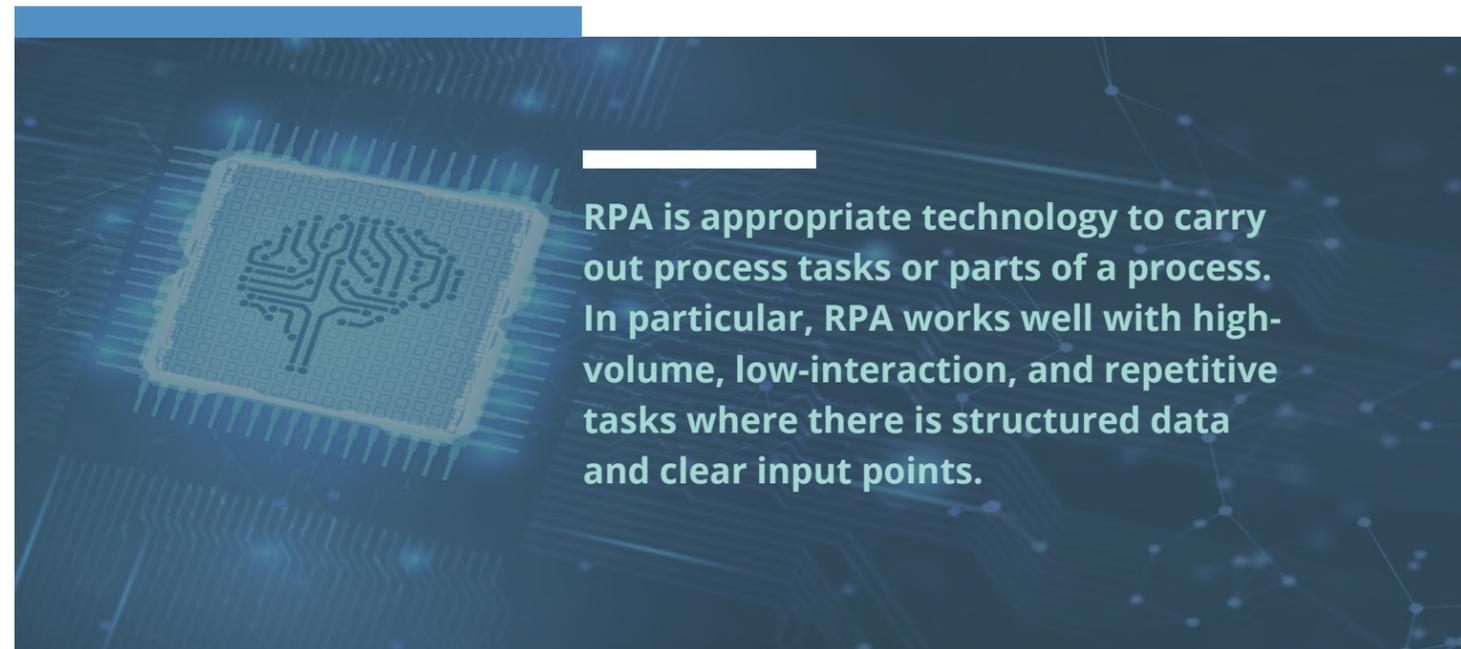
Autonomous:

As an advanced version of unassisted RPA, autonomous manages more complicated rules-based processes, using decision-making support in a live environment. This might include more dynamic styles of task management or cloud-based deployments.



Cognitive:

This type integrates various AI technologies like machine learning or natural language processing, enabling the bots to better handle unstructured data and advanced data identification and processing capabilities.

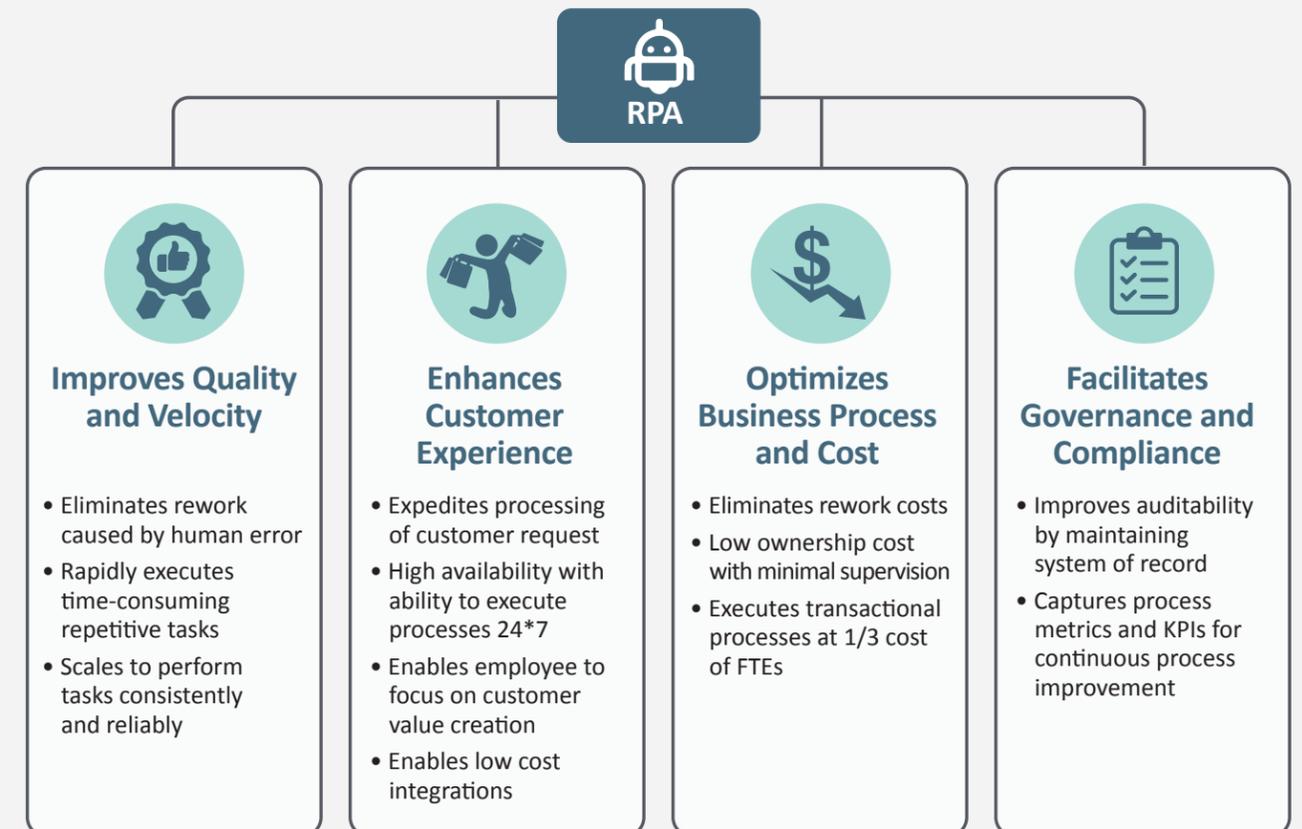


Tasks Appropriate for RPA Technology

RPA can carry out indispensable, high-volume and laborious tasks faster and with more accuracy, leading to faster service, less error correction, and less overall waste.

RPA “bots” – or digital workers – are capable of mimicking many human-user actions and carrying out a host of tasks, including but not limited to:

- Log into any application
- Connect to system APIs
- Copy and paste data
- Move files and folders
- Process structured and unstructured content
- Read and write to databases
- Open emails and attachments
- Scrape data from the web
- Make calculations
- Process data audits and reconciliations
- Work in Microsoft Excel
- Work in enterprise applications
- Fill out and read forms



Core Benefits to Deploying RPA

SDLC Partners' Process for Gathering & Vetting Client RPA Projects

SDLC Partners uses a discovery process to educate stakeholders, engage them, gather potential RPA use cases and assess the level of value each use case can deliver the organization, prioritizing and launching projects that meet business objectives.

Included in this document are **use case discovery questions that you can use to brainstorm** your own automation potential projects. Also, submit some automation use case information and our intelligent automation team will use their Feasibility Matrix to provide a score to help you prioritize and vet your use cases. **See pages 10-12 for details.**

Discovery Steps



Education as Preparation for RPA Planning

Conduct an RPA primer workshop with business leaders to educate on automation possibilities and how to discover and vet those potential projects.



Schedule Process Demo

Potential RPA projects that have passed through the assessment gate-check are scheduled for a demo walk-through of the manual business process.



Build RPA Project Pipeline Based on Priorities and Scoring

Repeat steps one through four to build an RPA project pipeline and work with key stakeholders and leaders to prioritize projects based on strategic value and speed.



Create Planning Documents and Launch Project

Finalize process definition documentation and other deliverables for each phase within the Automation Lifecycle.



Gather Automation Ideas for Key Functional Areas

Conduct follow-up break-out meetings with business unit or department leads to collect automation ideas from processes in each area.



Conduct Process Assessments

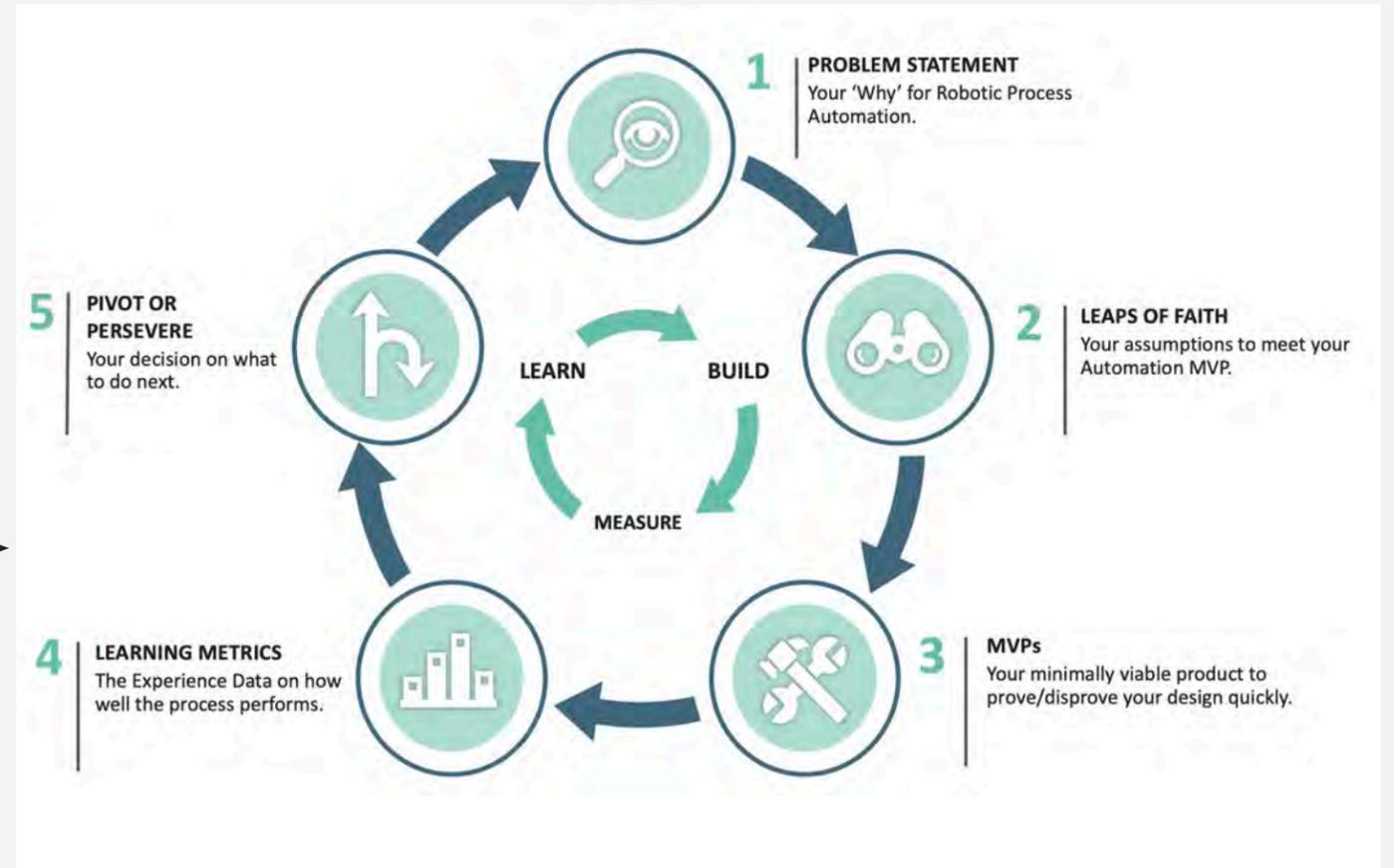
Using our **Feasibility Matrix tool**, we score each RPA idea and create a charter for each idea that yields target measures. The charter outlines the project, maps the current- and future-state of the target process, and identifies key performance outcomes desired. This ensures that any prioritized automation project aligns with business strategy and provides high-value or quick wins.

50-70%

OF INITIAL AUTOMATION PROJECTS SUCCEED because they avoid the hurdles that challenge early results and scaling successfully.

— Forbes

Automation Lifecycle



Experience makes SDLC Partners a low-risk, high-value automation partner.

We support digital transformation via intelligent automation by bringing personal attention, senior consultants, and seasoned automation experts.

Client Case Studies



Intelligently Automating High-Volume Invoicing for Major Fuels Distributor

A fuel distributor wanted to streamline their high-volume invoicing and approval processes. Our automation solution gave them greater control, efficiency, and accuracy to support cashflow.

[Read Full Case Study](#)



RPA Claims Processing: Automating 5,000 Claim Audits Per Week

Leveraging RPA to handle claims processing allowed a major healthcare organization to free up auditors to work on critical business growth priorities.

[Read Full Case Study](#)



RPA Automates License Credential Verification Cutting Costs by 30%

A major healthcare product and service organization was manually processing 800 provider license credential cases a day and needed to streamline and cut down the time and cost of this critical activities.

[Read Full Case Study](#)

Enterprise Functional Areas

Where in your organization is automation needed?

- Human Resources & Recruiting
- Sales & Marketing
- Customer Service
- Accounting & Finance
- Distribution
- Research & Development
- Administration & Management
- Production & Product Development
- Operations
- IT Support
- Purchasing & Vendor Relations
- Legal & Compliance

Some organizations choose to engage their enterprise by functional area using our Discovery Process to gather automation ideas and opportunities. The list of enterprise functional areas, above, is a good place to start, and will be used in the next section to uncover potential use cases for vetting.

In any organization, those critical areas that affect business profitability, efficiency and compliance, and require a high degree of manual effort, accuracy, and speed are appropriate use cases for Intelligent automation, particularly RPA.

Depending on the department, business unit and industry, the specific areas of value vary, but the benefits remain high, including back-office and front-office operations, centralized processes (like shared services), outsourced processes (like BPO), and distributed, global processes.

Back-office operations examples include accounts receivable, payable, general ledger, payroll, hiring, candidate management and onboarding tasks like benefits. Procurement processes including invoice processing, requisition-to-purchase order. Front-office operations like customer service, call center operations, database management, grievance and remediation, transaction management and reporting.

CLIENT SUCCESS STATS



30%

REDUCTION of provider credential verification costs



80%

REDUCTION in email translation processing time for 150K claims



5,000

Automated Claim audits per week

Use Case Discovery Worksheet

Moving through each functional area of the organization, or focusing on a particular department or business unit, review the following questions to gather intelligence on manual processes that should be assessed.

Use the following worksheet to document the functional area and identify manual processes to explore further for automation value.

Functional Area: _____

Manual Process: _____

1. Where do systems and processes tend to break down?
2. Where are there frequent or voluminous errors?
3. Where does most re-work or repeat work occur?
4. Where are you continually reinventing the wheel?
5. When an employee is promoted, moves to another area or leaves, which processes need to be recreated?
6. Where do you have high turnover?
7. Which processes lack standards and are too ad hoc?
8. Where do you think there's lots of time wasted?
9. What takes a lot of time but yields little strategic value?

Continue on next page

10. Where would you like to see more efficiency?
11. What are the must-do tasks and processes that you'd like to invest less time doing?
12. What are the processes or functions that haven't changed in years?
13. Which tasks do staff dread doing or complain about most?
14. Which areas get bogged down in lots of documents, back/forth communication, or tracking?
15. What processes require data entry in multiple systems?

Create a List of Potential RPA Projects

After documenting answers regarding the manual processes identified, list here those specific projects to use in the next section for assessment and feasibility scoring:

Use Case #1: _____

Use Case #2: _____

Use Case #3: _____

Use Case #4: _____

Use Case #5: _____

Feasibility Use Case Scoring

Once use cases have been identified, the next step is to score each automation project candidate based on metrics that indicate value to the organization. Submit key information to SDLC Partners for a feasibility score via link below.

Complimentary Feasibility Score

SDLC Partners' Intelligent Automation team is offering a complimentary feasibility scoring for up to five use cases submitted to them. Following are the questions included in our online form.

SUBMIT YOUR ANSWERS ONLINE HERE. You will be contacted to schedule a call to review your feasibility scores and provide feedback on your use cases

1. What percentage of your input is in a scanned format? (e.g. TIFF, PDF, TIFF mail attachment etc.) _____%
2. Do you have access to the scanned data in an electronic format? ___ Yes ___ No
3. What percentage of your input is electronic format which allows Ctrl C and Ctrl V? (e.g. workflow tool, database, Excel, email using standard template in mail body or as an attachment etc.) _____%
4. What percentage of your input is unstructured i.e. free flow text? (e.g. email body, notes) _____%
5. In cases using structured data, do you have standard template/layout? (e.g. Excel, email body, PDFs) ___ Yes ___ No
6. Are there frequent updates to the template? ___ Yes ___ No
7. Does this process involve working in Citrix? ___ Yes ___ No
 - If Yes:**
 - a. Can you do Ctrl+C of the data field you want to read and do Ctrl+V on the application you want to move the data? ___ Yes ___ No
 - If No:**
 - b. Can the data be extracted from any other system? ___ Yes ___ No
8. Does the process include judgmental decision making, considering multiple criteria? (e.g. Credit Assessment) ___ Yes ___ No
9. Are there any changes anticipated to this process or related applications in the near future? ___ Yes ___ No
10. What percentage of volume has dependency on clarification from customer through calls/emails? _____%
11. How many FTEs are involved in this process? _____ FTEs
12. What is the average daily volume flowing through this process? _____
13. What is the Average Handling Time in minutes? _____

Conclusion

Organizations are looking for ways to grow strategically, increase customer and employee satisfaction while gaining cost and time efficiencies. And, intelligent automation technologies, like RPA, have become the foundation of any digital transformation or business growth initiative.

But, in order to deploy successful and scalable automation solutions, every use case must have a measurable goal and likelihood of achieving outcomes that positively impact the organization.

This guidebook focuses on helping you identify and quantify high-value, quick-win RPA projects. Providing input on your use cases and requesting a feasibility score is your first step to uncovering and vetting your best automation potentials.

About SDLC Partners and our Intelligent Automation Services

Intelligent automation is a critical lever for your organization's growth and competitive profile. SDLC Partners equips organizations with flexible, scalable IA technology to increase efficiency, achieve higher-quality outputs, decrease cost, and elevate customer satisfaction.

Our seasoned IA team designs complete, smarter solutions across the IA spectrum -- Robotic Process Automation (RPA), artificial intelligence (AI), machine learning, and hyperautomation.

Business and technology leaders look to SDLC Partners for advisory services, technologies, and execution assistance that achieve business objectives.



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