

5 LESSONS LEARNED FROM OUR RECENT ROBOTICS PROCESS AUTOMATION IMPLEMENTATION

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ROBOTIC PROCESS AUTOMATION (RPA) CAN BE A POWERFUL TOOL IN ANY COMPANY'S ARSENAL, AND IS ON THE VERGE OF TRANSFORMING THE BUSINESS WORLD AS WE KNOW IT. Today, many companies are evaluating the costs and benefits of automating repetitive and rules-based tasks that are currently performed by people.

As West Monroe helps clients implement RPA through a combination of change management, technology, and workforce consulting, we decided to try it for ourselves. Over a recent couple of months, we incorporated RPA into our new-employee onboarding process and accounts receivable process. We wanted to know exactly the type of hurdles, challenges, and rewards that come from an RPA implementation. And we are happy to share the following lessons learned, fresh from our own experience.

1 UNDERSTAND THE COMPLEXITY OF THE PROCESSES YOU WANT TO AUTOMATE WELL IN ADVANCE.

Today, rules-based processes are prime candidates for automation. However, these same processes can cause complications for RPA software implementations when complexity is not completely understood and documented. While people can make decisions by learning patterns, RPA software has difficulty mimicking this human ability. A process that is almost entirely rules-based but requires just one ambiguous decision may prohibit an RPA implementation from being effective. In addition, data entry processes that touch multiple applications can become increasingly complex to automate if the data format differs between systems.

There are workarounds for these nuances, but the resulting increase in process complexity can cause RPA software to become more tedious and costly to configure than continuing to use a human to perform the same task. While

more complex processes requiring human decision-making may be automated by the robotic workforce in the coming years as machine learning becomes tightly coupled with RPA software, it may not make sense to automate now.

2 HOST FUNCTIONAL AND TECHNICAL DESIGN SESSIONS TO MAKE SURE BUSINESS USERS AND TECHNOLOGY USERS ARE ON THE SAME PAGE.

Before bringing RPA into your workflows, it's important to hold "design sessions" that answer key technical questions. From a functional perspective, this includes mapping out business processes, gathering requirements and information from end users, collecting information on the frequency of process execution, analyzing how often there are "exceptions to the rule," and documenting process outputs.

However, these are not the only details that influence your RPA implementation. Failing to hold technical design sessions can severely delay timeline and result in unnecessary re-work. A technical design session should cover the following:

- Secure application availability in advance for robot development and testing if system availability constraints are a factor.
- Establish user access to test environments for configuration. Also note any nuances between test and production environments that need to be accounted for in go-live.

- Consult with end users to confirm the type of robot being developed: Back-office robots may require the development of system log-in workflows that are not necessary for a user-triggered, front-office robot.

3 YOU WILL PROBABLY NEED TO ASK PEOPLE TO RE-ENGINEER THEIR PROCESSES – AND THIS REQUIRES CHANGE MANAGEMENT BEFORE GO-LIVE.

When evaluating processes to automate with RPA, process re-engineering is almost always recommended to increase the ease of implementation. The scale of these modifications, however, can vary. Factors such as data inputs required, pre-existing data standardization, number of system touches, and flexibility in the sequencing of tasks can influence the amount of upfront work required before configuration begins.

For a seamless RPA implementation, it is important to manage the expectations of the project team by establishing a communication schedule that outlines the reasons for the process re-design and the actions required by the team. Change management is critical throughout the lifecycle of an RPA project to ensure that employees are properly prepared to take on new tasks that come with process re-design and the upcoming robot deployment. In contrast to most change management initiatives, RPA requires a robust change management plan before go-live, given the magnitude of change required by your teams.

4 OVER-TEST THE ROBOT TO ENSURE IT HANDLES EXCEPTIONS PROPERLY.

It is easy to start celebrating once your robot successfully automates a process for the first time. However, the real work begins in the testing phase to ensure the robot handles exceptions properly. There's nothing worse than believing you have successfully deployed your first robot only to realize a week later that it fails when triggered on Employee X's computer because her screen resolution is different from Employee Y's. To ensure "robot sustainability," use activities in the workflow configuration that give the robot instructions on what to do in case of errors or when encountering Condition B instead of Condition A. Finally, check, double check, and triple check that the process runs in all scenarios

types before signing off on a successful implementation and handing over to the end user.

5 GROWTH MUST BE KEPT IN THE BACK OF YOUR COMPANY'S MIND. THERE ARE MULTIPLE WAYS TO PERFORM ONE OBJECTIVE, BUT SOME CONFIGURATIONS ARE MORE CONDUCTIVE TO SCALE THAN OTHERS.

As companies grow and change, processes tend to evolve. Consider this example: A company has a centralized accounts receivable department that processes all invoices out of the corporate headquarters in Chicago. When configuring a robot to automate invoicing, the RPA implementation team instructs the robot to type "Chicago, IL" into the address line of the invoice being sent to the customer by hardcoding this deep into the workflow. Years later, the company expands and decides to divide accounts receivable operations into East Coast and West Coast departments, as business offerings have differentiated and unique invoicing procedures must be followed. The company must now go back into the workflow and re-configure the value typed on the address line to reflect this change because the original invoicing robot was not developed with scalability in mind.

Although this is a minor theoretical example, there are countless scenarios where designing a robot to automate a task given the current situation could result in headaches down the road when change occurs. Based on our own experience, West Monroe recommends taking an agile, or iterative, approach to all RPA implementations – meaning every time a change or new exception is introduced to the process, the robot needs to be reprogrammed.

ACHIEVING A RETURN ON YOUR RPA INVESTMENT

Robotic process automation, when implemented thoughtfully, can create tremendous value across your organization, as it has for ours. This value includes:

- **COST SAVINGS AND EMPLOYEE ENGAGEMENT:** Automated processes reduce the number of employee hours required, giving you the flexibility to grow your operations quicker without adding headcount. It also allows you to reassign existing employees to

more challenging and engaging work. Employees with schedules once filled with mundane tasks may be retrained to analyze and interpret data, enabling intelligent decision-making across the enterprise.

- **ATTRACTING AND RETAINING EMPLOYEES:** Millennials are not actively pursuing data entry jobs, yet these functions are still critical to many organizations. Implementing RPA can help mitigate the risks of labor shortage and turnover.
- **INCREASED PRODUCTIVITY AND BETTER CUSTOMER EXPERIENCE:** As some services become more commoditized and customer demands increase, being able to deliver higher touch, more responsive service to customers can be a real differentiator.
- **REDUCTION IN HUMAN ERRORS:** Mistakes can be costly, and potentially damaging to your reputation. Routine, repeatable tasks that are automated by RPA can reduce the human error that is all too common. Studies have shown that the human brain is wired to avoid continuous decision-making, particularly in repetitive situations where the brain can easily slip into “autopilot” mode.
- **REGULATORY COMPLIANCE:** Data entry errors can lead to audit and compliance failures, which have real financial impacts. Particularly in highly regulated industries like banking, RPA offers additional checks to ensure compliance.

- **LAYING A FOUNDATION FOR THE FUTURE:** With cognitive capabilities such as machine learning and natural language processing becoming increasingly embedded in technology, the promise of RPA also lies in the future value of implementation. By deploying RPA now, firms can lay the groundwork to capitalize on artificial intelligence developments, and thus smarter robots down the road.

GETTING STARTED WITH RPA

West Monroe is assisting clients that are interested in taking advantage of robotic process automation capabilities by:

- Evaluating current processes to determine whether they could be automated through RPA,
- Facilitating design sessions to understand the people, process, and technical implications of RPA,
- Configuring and managing RPA software implementations, and
- Establishing an RPA “center of excellence” for sustainable maintenance of the robotic workforce.

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