Sensible RPA:
prepare your organization for automation!

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RPA is a fashion trend that carries with it a number of myths and traps. Not being aware of them can prove harmful for the organization wishing to implement automation by exposing it to significant costs and misused time. Meanwhile, the key aspect here is to prepare for the process through engaging your employees in optimization and standardization based on, for instance, the lean/six sigma methodology. How do you proceed to implement automation sensibly, i.e. quicker and cheaper?

A high-level decision is made at a certain modern business services sector organization to automate their processes. The IT provider that arrives at the site to take care of the software design for the "robot" is, however, faced with a number of challenges: no set order for the processes, tasks that are a daily waste of time for the specialists involved, high level of differentiation as regards the way in which processes that are seemingly the same are carried out, a large number of exceptions, deep-rooted feeling of anxiety and resistance in the face of change in the workforce. Ultimately, a few key staff members leave the BPO company for fear of losing their jobs and due to the pressure to share their knowledge, while implementation of the intended automation becomes delayed indefinitely as a consequence of numerous tests and necessary adjustments. All of the above is giving the president of the organization a major headache, and the bill for the "robot" keeps on growing. While having his morning coffee, the president reaches for the latest issue of his favourite industry knowledge source and by chance opens it on a page where the 5 myths/traps relating to implementation of RPA (see the inset) are discussed. He begins to wonder…

…whether he could possibly run the entire process in a completely different way?

How do we do it better?

Now, at a time when RPA is becoming an ever-present trend and seems to be a necessity for every organization in the industry, it would be worth asking ourselves a simple question as to why do we actually want to implement RPA. Most often, the business need here is to optimize costs and increase process security. Now that we are aware of the 5 RPA myths, we should be able to understand that the response to the above need should be to first and foremost establish a culture of continuous improvement, i.e. engaging employees in improving our processes using the lean/six sigma/BPM performance management tools. Many organizations falter at the beginning of this road without having utilized the enormous potential for elimination of waste and volatility in their processes through undertaking certain optimization measures that would require zero investment on their part. Our experience shows that applying a structured and methodical approach enables organizations to increase their productivity by 10-30% per annum, while at the same time ensuring that a culture of positive attitude and employee engagement is established. It is only the second step that should be about searching for solutions such as RPA that would enable us to automate those tasks that cannot be eliminated.

Automation will be effective, quicker and cheaper if you first take the 4 crucial steps enabling you to gradually establish your employees' awareness and engagement, where each of the measures follows naturally from the previous one. Our experience shows that this staged and coherent chain of actions will ultimately lead to "removal" of waste from processes and engagement of your workforce in standardization. Thanks to applying this type of approach, the "robot" will not be seen as a foreign body within the organization; on the contrary, it will be accepted by your employees as the natural consequence of the work environment improvement process where they will be happy to entrust certain tasks to it.

Let us look at the stages in a "backward" order, i.e. from the moment you successfully implement automation, back to the mapping and optimization of processes, then the elimination of waste, through to the initial engagement of employees achieved by means of introducing transparency in the service centre which in turn leads to employee awareness and approach to improvement based on data.

Step 5: Quick, cheap and effective RPA

The IT provider/RPA team is notified by the operational team that process X is now ready for automation. A short review of the key data relating to the volumes, process stability, quality of documentation and readiness of the specialists responsible for the process to entrust the task under consideration to the "robot" enables the team to quickly set to

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Before you make the decision to implement automation: learn about the 5 RPA myths.

1. You do not have automation, therefore you are being left behind, you have to learn and implement "it" quickly wherever you possibly can vs. It is only those organizations with employees and processes ready for automation that will be able to do implement it quickly and cheaply.

2. Automation means clear financial benefits (24 hours per day, error-free, etc.) vs. due to the fact that the organization is not properly prepared to implement RPA, the total cost and time dedicated to implementation of the robot often results in an extremely lengthy and risky 2-3 year period before any return on investment is achieved.

3. Automation can be implemented without engaging your employees, as it is all about suitable IT software and developer engagement vs. Employee engagement is the key factor of success and the prerequisite element of the automation strategy for the organization. Automation becomes easy developer work only when there are properly prepared processes in place and you have the engagement of prepared people.

4. Robots optimize your processes and costs vs. It is people that optimize your processes and reduce your costs. They eliminate volatility and search for the best possible way in which a given task can be performed and completed/standardization/. When performing the tasks entrusted to them, robots work like a simple binary mechanism.

5. Robots will replace humans vs. Robots can be exceptionally helpful tools for your employees and those working under their control when your human resources and processes are ready to pass the tasks at hand to the robots.

work. Two weeks later the "robot" is ready for testing. The tests run by the employees disclose the need for some minor adjustments, while proving their enthusiasm for the reduced time needed to perform their work and the fact that some unpopular and repetitive tasks are now eliminated from their duties. A month later the employees are free to fully utilize the freed-up time and dedicate it to other priorities, mainly adding value for their customers and further optimization/standardization of additional processes.

Step 4: Standardization: the shortest route

For automation to happen quickly and cheaply, as in step 5 discussed above, you need detailed documentation for all tasks. This new standard goes above and beyond your Standard Operating Procedure, which is often drawn up for a different purpose and at a different stage, and it should set out, in a clear and unambiguous manner, the shortest "first-time-right" route to completing a given task. While implementing our stan-

dardization processes, we apply the TWI methodology (already tested and proven in practice in the service sector), however the detailed description thereof goes beyond the framework of this article.

Why is standardization of the tasks that are actually carried out so important? Experience teaches us that a lot of the work that has to be completed by the external providers during implementation of RPA is to do with the fact that organizations are lacking in suitable process maturity. Which forces the solution provider to perform numerous jobs that precede the process of designing the software for the "robot" itself. They include detailed documentation analysis, preparation of a suitable description of the standard for the tasks to be performed, description of exceptions, solution testing, and subsequently specifying the scope of adjustments resulting from any business changes. These are not the core competence of RPA providers, and as a consequence the project becomes much more expensive as the additional jobs can account for as much as 50-80% of the total cost of automation.

Andrzej Kubiak of SmartMedia, a provider of automation solutions, comments: "Many organizations do not have the right documentation for their manual processes, the only place where given standards can be found is in their employees' memory, and often, even if they are put down on paper, they were drawn up a few years back and no one has taken the trouble to validate them since. Meanwhile, an up-to-date standard to which employees actually adhere when performing their tasks dramatically reduces the time needed to implement automation, which in turn translates into an even quicker ROI from the project; it becomes achievable in only 3 months!".

Which is why the most advantageous position for an organization would be to have its own on-site "standard masters" selected based on the data available and experience, where they would on a daily basis perform the tasks involved in the given process in a manner enabling them to do so following the shortest route and error-free. These experienced employees having the tool and capability to create the standards become partners for the RPA software designer. The

job entrusted to the "standard master" is to ensure that the "robot" is designed is such a way as to perform its tasks precisely in line with the standard, i.e. following best practice applied within the organization. Furthermore, the expert becomes a partner for detection of exceptions, testing and removal of potential errors in the "robot's" work. You could say that the "standard master" is the "robot's" manager, ensuring that it works in a productive manner.

Furthermore, it is the master that will be then responsible for creating suitable documentation to enable modifications to be introduced to the "robot" in the future, e.g. in line with any changes in the legal environment, as well as ensuring that the documentation in place reflects the actual business process as to make sure that, should the need arise, other operational specialists are able to perform the processes in a secure manner.

Step 3: End-to-end process: mapped and optimized

The step to be taken in preparation for standardization is the end-to-end mapping of the process as to enable identification of its key participants and points of interaction with the customer (be it internal or external), as well as determination of how the process actually runs. It is important to carry out an analysis and introduce improvements in terms of inputs and outputs as to allow for elimination of variations within the process; this will establish the foundations for subsequent standardization and enables you to identify any areas where further improvements might be needed.

Step 2: Improvements and elimination of waste

However, the starting point for taking any further steps should be implementation of improvements within specific areas, e.g. as regards the work of individual teams and employees. The employee attitudes established at this stage and the practical skills held by the staff will enable the organization to eliminate a lot of waste, and thus avoid automation of tasks that do not add any value for the customer. Which are to be understood as tasks that constitute the elements of unnecessary bureaucracy or chain links that could be reduced almost entirely to the absolute

minimum, e.g. one key touch or sending of one e-mail. An example here could be the careful copying of data from one system into another, which could potentially be automated. Looking at your processes from the perspective of conscious waste and subsequently engaging your employees in elimination of

its sources results in the process, a natural candidate for automation, being eliminated right at the outset. The golden rule that applies here is: optimize first, eliminate any unnecessary tasks, and then automate whatever is left and cannot be further optimized.

Step 1: Transparency and employee drive to change

Optimization, and consequently automation, is a change that requires the full engagement of employees. And we are not talking about a one-off "land rush" or a forced process; on the contrary, it is about your operational employees implementing real changes in their daily tasks and commonplace team habits. Improvements should be introduced starting with the smallest ones: at individual employee level to start with, then the more complex and end-to-end ones: in your cooperation with customers, and finally implementation of standardization in respect of processes from which all waste has been eliminated.

The key driver to significantly speed up and enable implementation of changes is transparency, which in turn is first effected by measuring all the tasks performed by employees. Furthermore, transparency covers the establishment of joint team awareness of all employees: which tasks add value for the customer (green), and

which ones fail to add any (red)? Being aware of the numbers is a real driver for change.

As a result of an ongoing and periodic data analysis, employees gain knowledge as to what factors impact on their team's performance. They are able to see for themselves what can be changed. And once change is implemented,

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they will be able to see the resulting progress and benefits possible to achieve following from implementation of best practice across the entire team. Ultimately, they will also see the benefits of freeing up their time resulting from entrusting their workload to a "robot".

It is easy to identify a few simple processes to be automated, however if you do not measure the tasks your employees perform, you will remain blind as to the possible broader application of RPA. Meanwhile, the data available shows you whether the given process is ready to be automated, it enables you to unambiguously calculate your ROI, and ultimately it allows you to verify the real impact of automation on freeing up your employees' time.

Our experience in working with clients that begin from the bottom, i.e. engaging their employees in improving the processes and establishing a real culture of continuous improvement, shows that their organizations will follow a well-prepared path to implementation of automation strategies. Whereas those organizations that wish to omit this particular stage could well find themselves in a wild and hostile environment, where any further moves are significantly more difficult to make and in actual fact could cause more harm than good.

Learn more about this approach on www.positiveproductivity.eu