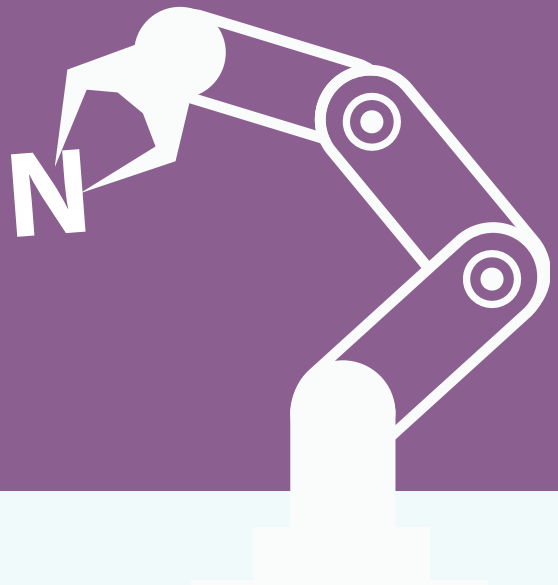


**Chazey  
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# **Advancing Your Shared Services with Robotic Process Automation**



# INTRODUCTION



Organizations continuously strive to achieve greater efficiencies and more streamlined operations as a matter of course, particularly with Shared Services. Each advancement has the potential to enable cost savings and greater scalability. The vast-majority though are incremental, delivering small scale targeted benefits while requiring constant resourcing and change management efforts. So, when an opportunity for a quantum advance arises there is heightened interest; large scale evolutionary progress in a single endeavor. Robotic Process Automation (RPA) is the latest proposition to promise a quantum advance for Shared Services.

Rob Serjeant  
RPA Leader  
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# BEYOND THE HEADLINES

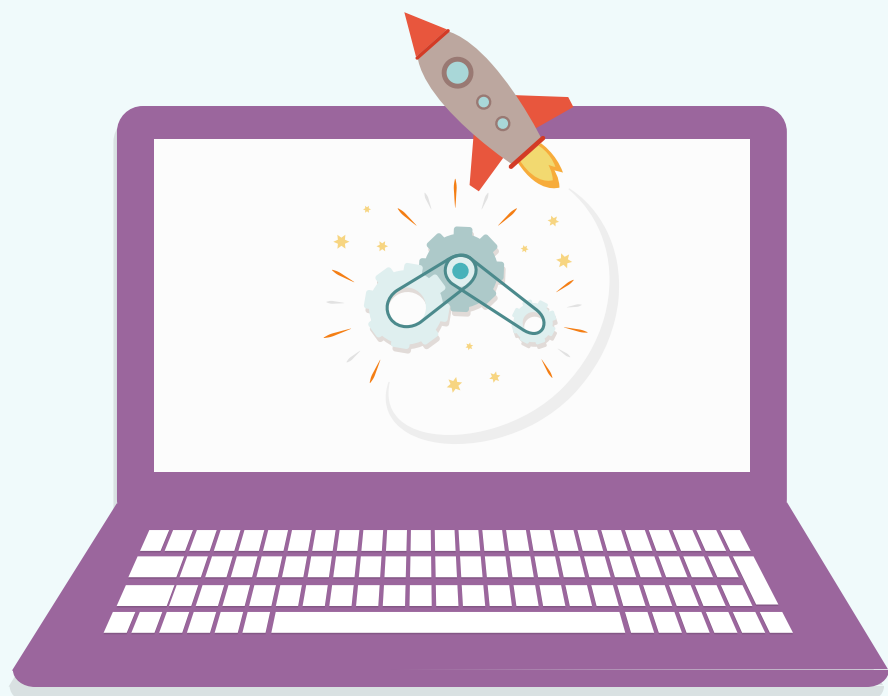
But what is RPA? Individually each word of the acronym is a key buzz word in business, so the combination captures the imagination. By its terminology RPA promises advancement, standardization, and efficiency on a far more progressive scale than previously seen. In common definitions RPA essentially comes down to removing human beings from operations that are repetitive evaluations requiring rules based decision criteria. Where-as automation addresses high volume repetitive tasks, RPA is the next step to include decision making under a controlled set of parameters.

A simple illustration to show this progression can be found in invoice processing. Currently automation is used in the matching process. A system screens incoming invoices to match them against authorized Purchase Orders (POs); PO numbers are matched and screened against a set criteria in a 'yes / no' fashion. Successive 'yes' answers then triggers the next level of automation (typically payment processing). Any 'no' answer shunts the invoice to a human being for discrepancy handling. This is where RPA offers the promise of new efficiencies.

Discrepancy handling has a human being confirming the system discrepancy, identifying the root issue, then deciding on how to properly address the discrepancy for resolution. Using the rules already in place for the human operator (albeit in greater detail)

RPA introduces a new level of automation with the same benefits of linear automation. RPA could issue the PO requestor with the means to complete a new / revised PO when the invoice amount exceeds the original PO tolerances, with the history already linked to accelerate the processing of the matter. Other specific discrepancies can be handled in such an automated fashion, removing the time required for human comprehension and processing at the decision point and closing out resolution. With RPA, it is possible for the number of discrepancies handled per hour by a human to be accomplished in a single minute.

More advanced applications of RPA can leverage processing across different systems and platforms. Using the Graphical User Interfaces (GUIs), RPA is an automated bridge between the systems / platforms that again can perform high volume, rules based tasks with greater speed, efficiency, and accuracy than human users. RPA actions are effectively those of a human user performing the same task. In this context RPA achieves the benefits of systems integration without the time and cost of an integration, and avoids the constraints of time and error rates associated with human users operating across different platforms and systems. Now tasks such as cross validation, data compilation, and consolidation that have been higher order can realize the benefits of automation.



# TOP 10 THINGS TO KNOW ABOUT RPA

1. RPA is a flexible **software** tool to automate manual activity for the delivery of business processes or IT services by replicating the actions of a human being interacting with the user interface of a computer system
2. RPA software is **non-invasive**, as it sits on top of existing systems, without the need to create, replace, or further develop other platforms; the RPA software accesses other computer systems through user interfaces with a logon ID and password (like a human), and through the presentation layer, so no underlying systems programming logic is touched
3. RPA is **enterprise-safe** as it is a robust platform designed to meet enterprise IT requirements for security, scalability, auditability, and change management
4. RPA has the ability to **cross multiple systems**, and include multiple decision points / calculations so it is not limited in working with a single instance or package
5. RPA **requires an electronic input or trigger** to commence working, it does not self-initiate
6. RPA is business user-friendly, there are low requirements for technical support and standard functionality typically originates inside business operations, not IT as RPA is **easy to configure** using an interface with code generated behind the scenes
7. RPA has a substantially **lower economic threshold** compared to traditional ERP implementation so it can be applied more broadly in a cost-effective manner
8. RPA is most **suited for rules driven, data-intensive processes** that are repetitive in nature (e.g. execution of data entry into SAP or a full end-to-end business process)
9. RPA is also **ideal for work-flow processes** that can be performed against a set of business rules programmed to either start and stop at a designated time or to continual perpetually as a continuous cycle
10. RPA is **not artificial intelligence**; it is a software application that processes data inputs in a linear fashion, choosing the next path in accordance with predefined specific criteria – it does not make subjective judgements or learn to interpret rules as human operator may



# KEY CONSIDERATIONS

As an organization, it should be quite straight forward to see the potential RPA has to promise. It introduces greater speed, efficiency, standardization, and accuracy to the repetitive high volume rules based tasks. At face value this suggests that RPA is a sound proposition to embrace. However, as with all sound propositions the devil is in the details. The key question for an organization falls back to a basic precept, 'is this right for me?'

There are many facets required to answer that question. That said there are some key considerations that an organization should address from the outset when considering RPA:

## Do you have clearly defined end-to-end processes?

It is one thing to have commonly understood processes and another to have them clearly defined. The latter means having each part of the process flow documented to show the clear roles, responsibilities, expectations, and performance criteria including the handoffs between various parties (e.g. Human Resources Business Partner and Benefits Specialist). This view allows for the identification of opportunity areas in the flow for RPA that show a clear scope and operational parameters for its application.

## Are these processes consistently adhered to by your people?

Having the processes clearly defined and documented is the starting point, ensuring they are valid and accurate is the second. The promise is about enhancing a consistently well performing set of repetitive tasks through automation. If the practice differs from the process, at best the automation will not enhance the performance beyond current levels. At worst, if there are a high degree of exceptions and inconsistencies the automation will create additional steps that risk amplifying the underlying inefficiencies in the system.

## How much time and effort do the proposed RPA tasks take today with human operation?

RPA can reduce an hour's worth of work into a minute by promise, but it requires proper design, setup, and calibration to achieve the result. So, in addition to the financial Return on Investment (ROI) there should be an effort based ROI consideration as well. Changing out tasks behind the same operation is of negligible benefit to the organization. Similarly automating a declining or sun setting task (being phased out) may require more effort than continuing the current human based operations. RPA has a lower economic threshold and requires less specialised resources to establish than ERP, so it should extend the benefits of automation further that has been possible without becoming a standardised solution to all high volume, repetitive, rules based human tasks.

## What is the organization's technology road-map for the future?

The essence here is how do the previous 3 questions align under the current view for the future. RPA lowers the threshold to realise the benefits of automation and serves as a bridge where integration or new systems are not plausible. But organizations need to be wary of the benefits being seen as a viable solution where more robust solutions such as ERP implementation or integration are appropriate. Instead the evidence should be used to bolster the technology road map for the right solution, not merely the latest or seemingly most expedient option.

These considerations are a starting point, there are still many essential evaluations that should be completed prior to any decisions just the same as any technology application.

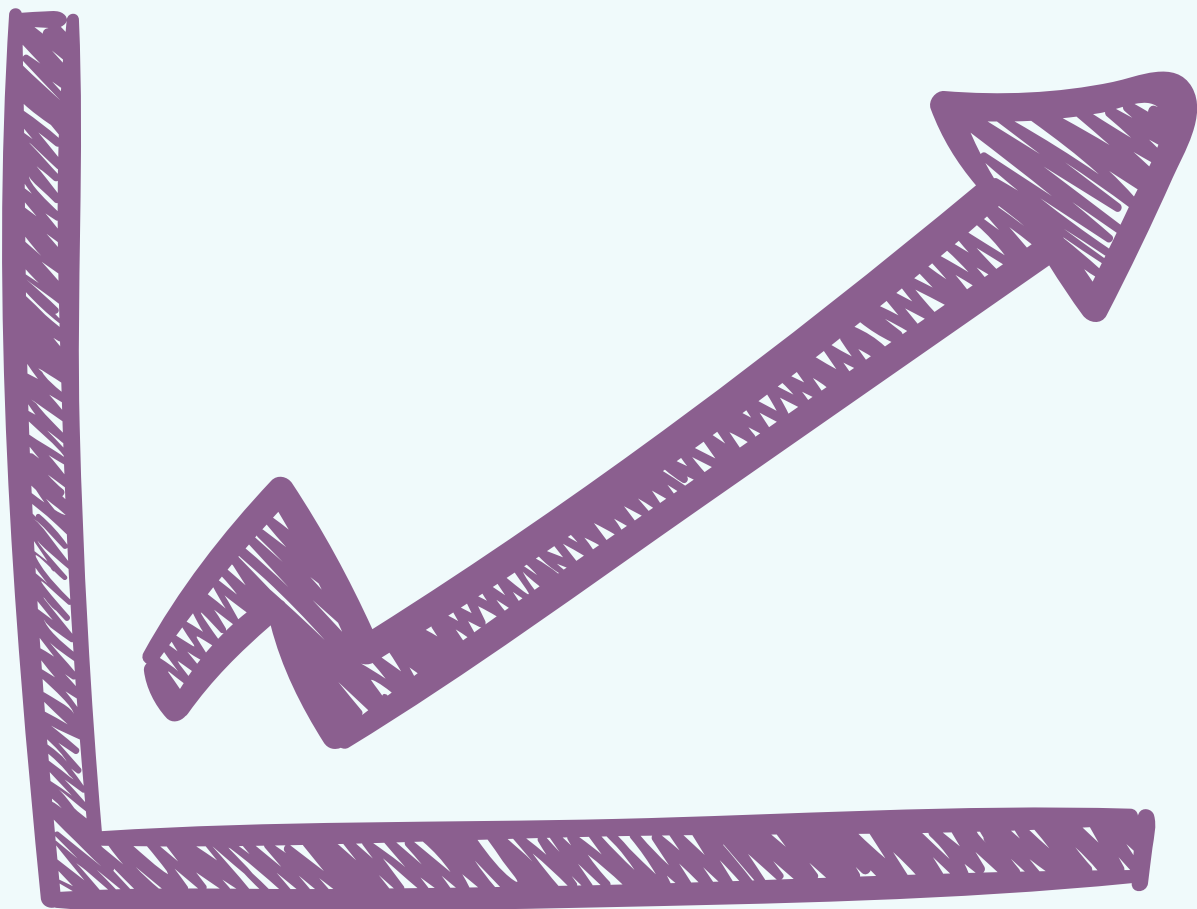
# CONCLUSION

RPA has tremendous potential and promises exponential gains in efficiency. Yet it is still in its infancy in the world of business operations. The concept has yet to produce the proven results it has promised for large scale operations; it has not yet had sufficient time and exposure to fully qualify its actual performance. For now, trials of varying size and scope are playing out in different organizations around the globe. In time the data will be sufficient to qualify the results and true potential for RPA.

That said, there is a sound logic for the early adopters moving ahead with larger scale implementations. RPA has a solid premise and rational technological plus there is a wealth of experience with automation in business processes. The questions at present are not if RPA will provide tangible results. Rather the unknown aspect is whether RPA is an evolutionary advancement or

another incremental progression. Early adopters can be among the first to benefit and set the tone for future development.

What makes sense for your organization? An early adopter strategy? Being a fast follower? Moving with maturity? Or an alternative approach? There are an array of choices and benefits available. Chazey Partners has professionals with decades of experience in business operations and deep technical expertise. We can help you chart a course with RPA that best suits your organization.



# Chazey Partners

Chazey Partners is a practitioners-led global management advisory business. We bring together a unique wealth of experience, empowering our clients to strive for world-class excellence through Business Transformation, Shared Services & Outsourcing, Technology Enablement, Process Enhancement and Corporate Strategy Optimization. We pride ourselves in having built, operated and turned around some of the world's most highly commended and ground breaking Shared Services Organizations, and for implementing many highly successful multi-sourced (shared services and outsourced) delivery solutions. Over the last 20 years, we have delivered numerous programs globally, in the US, Canada, UK, Continental Europe, Ireland, India, Eastern Europe, South America, Singapore, Australia, China, Middle-East and Africa. Our experience covers both Private and Public Sectors, providing expertise in a wide spectrum of business functions, including Finance, HR, IT and Procurement.

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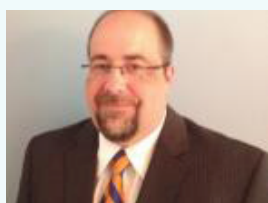
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