Enterprise RPA Best Practices

Recommendations for Achieving Large Scale RPA Programs

JANUARY 2019

Agenda

- The RPA Journey and Continuous Improvement
- Large Scale Awareness, Training, and Enablement
- Robotics Technology Center and Evolution to a CoE
- Process Development Approach
- Large Scale Digital Worker Team Management
- Large Scale Infrastructure
- Operations and Metrics
- Journey Roadmaps
  - Federated RTC with Citizen Developers
  - Federated RTC without Citizen Developers
  - Central RTC with Digital Assistants (Attended Robots)

The RPA Journey & Continuous Improvement

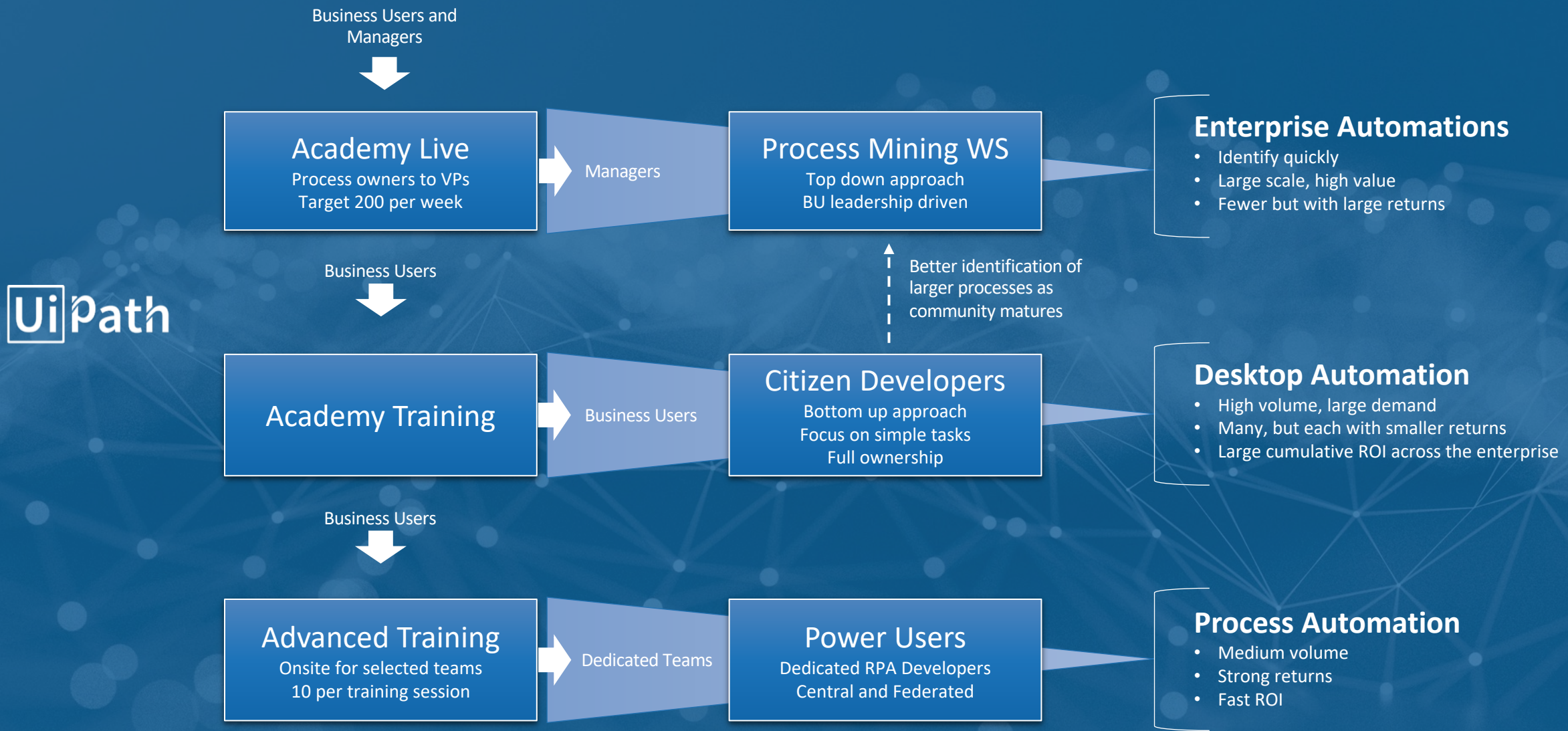
The Leading Enterprise RPA Platform

RPA Program Life Cycle

Large Scale Awareness, Training, and Enablement

The Leading Enterprise RPA Platform

Going From Academy Live to ROI



Robotics Technology Center and Evolution to a CoE

The Leading Enterprise RPA Platform

Starting Centralized, Prepare to Scale

- Start Central
- Establish Partnerships
- Define Policies & Procedures
- Implement Governance
- Create Enablement Programs
- Achieve Maturity
- Plan for Scale

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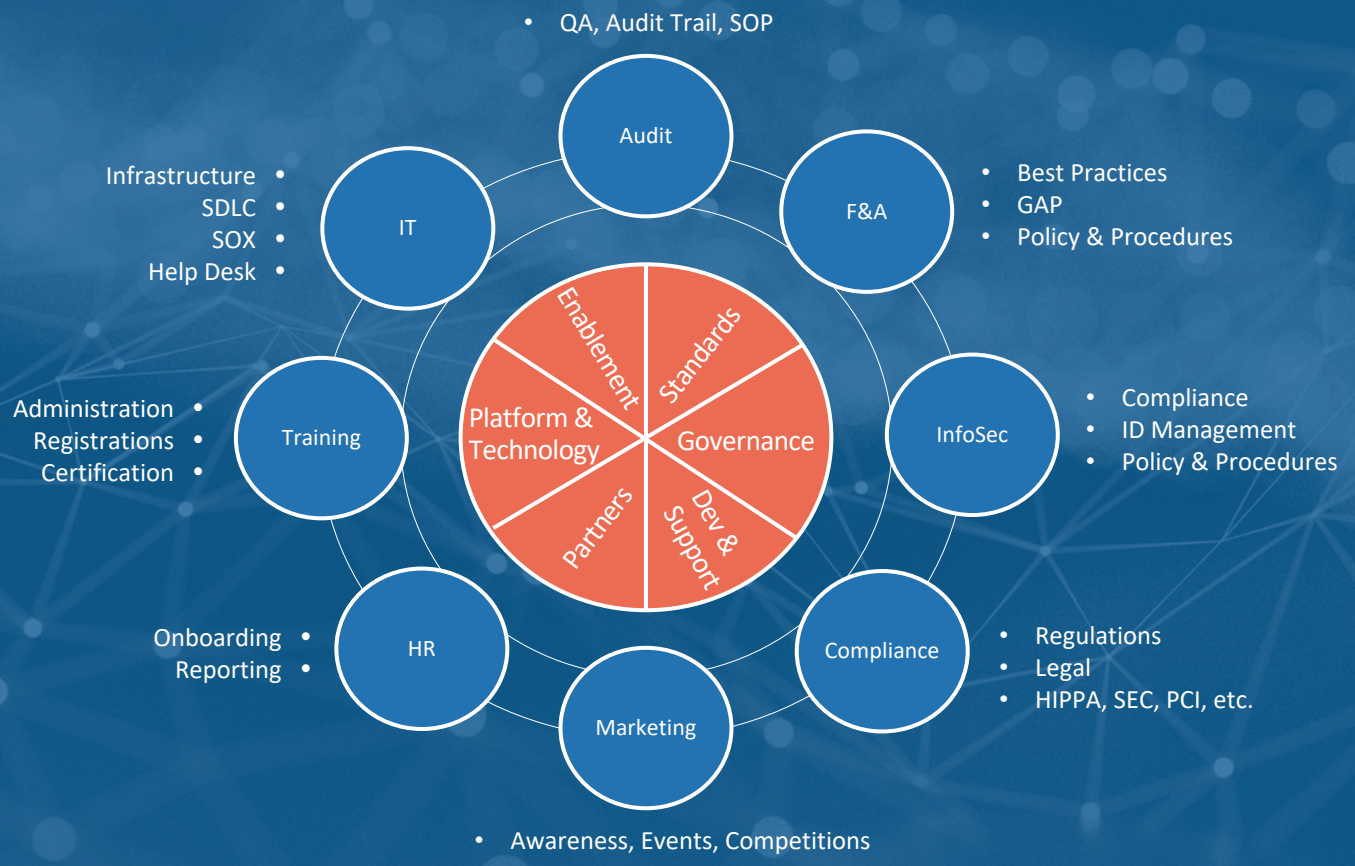
Central Robotics Technology Center (RTC)



Robotics Technology Center and Evolution to a CoE

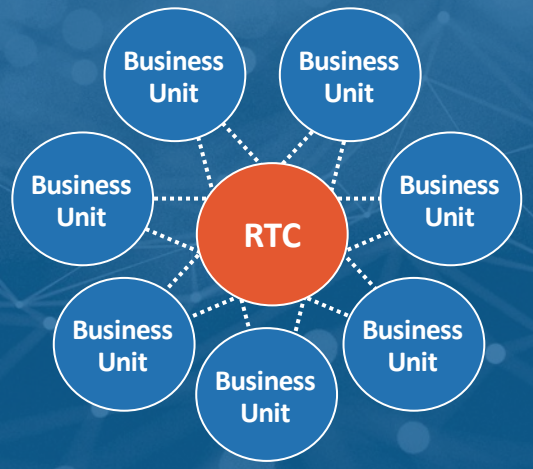
The Leading Enterprise RPA Platform

Evolution from a Central RTC to a Federated Model

Pilot Phase (1-6 Months) | **Scale Phase** | **Transformation**

CENTRALIZED

One RTC serving business units at the beginning of the journey.

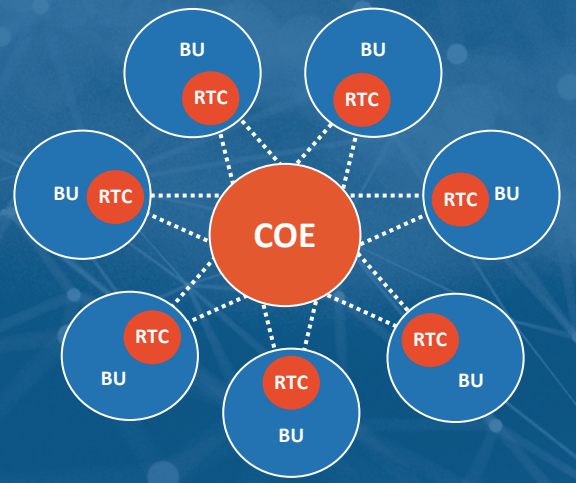


Evolution

BU enablement, training, and delegation of roles and responsibilities

Federated

One governing central COE, linked to several business focused RTC's



BU's run RTC's

- Process and pipeline ownership
- Accountable for ROI
- Process development
- Level 1 & 2 Support

Central owns platform and standards

- Infrastructure, licenses, IT ops
- Governance & standards
- Enablement
- Knowledge share
- Central development
- Evolves to a true CoE

Development Approach

The Leading Enterprise RPA Platform

Process Prioritization Methodology

- **Partners**
- Full Development Life Cycle
- Engage leadership to *strategize transformation*

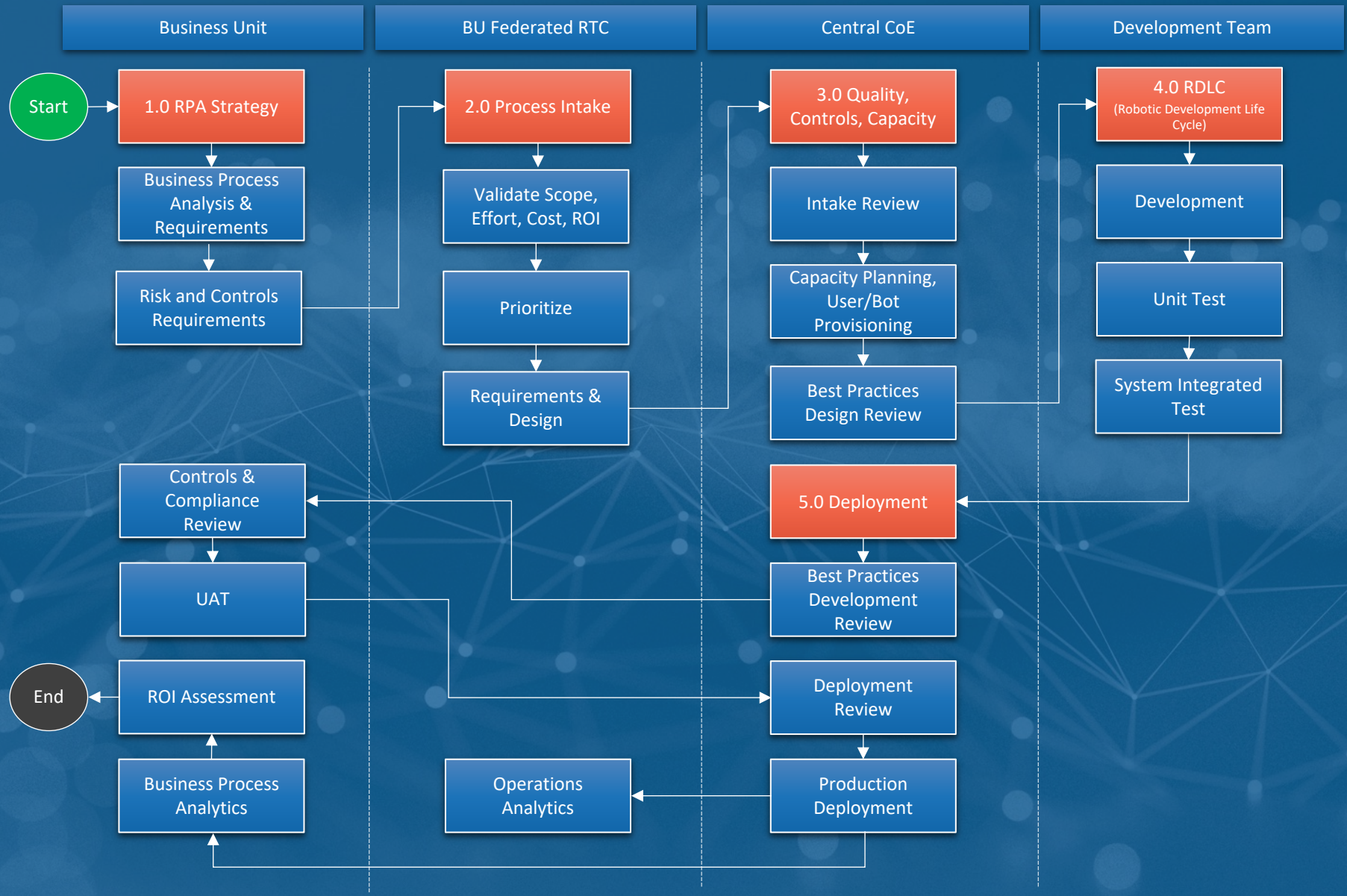
- **Power Users & Partners**
- Full to Partial Life Cycle
- Engage business for *change management*

- **Citizen Developers**
- Fastrack Development Life Cycle
- Empower citizen developer community

Development Approach

The Leading Enterprise RPA Platform

Sample RDLC (Robotics Development Life Cycle)



Large Scale Digital Worker Team Management

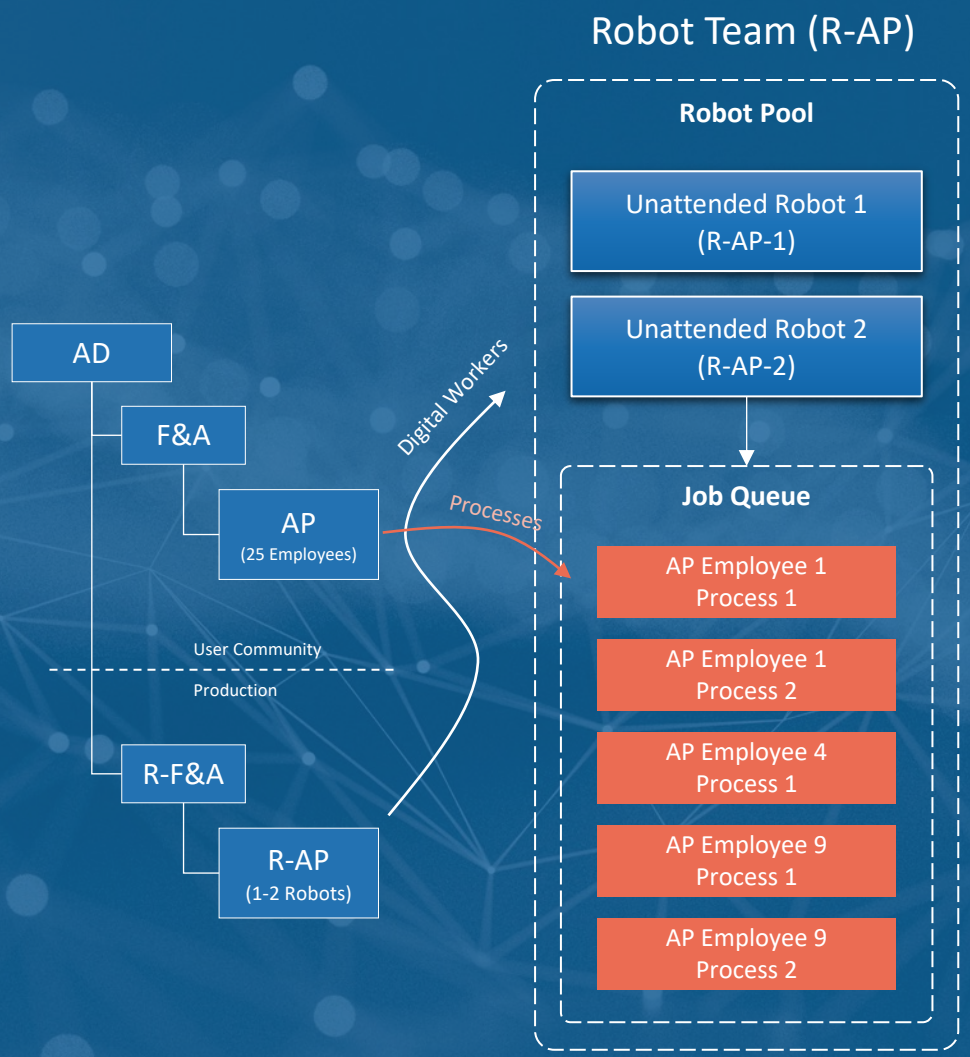
The Leading Enterprise RPA Platform

Robot ID's, Robot Teams, Provisioning, and Security

- Robot ID's mirror citizen development employees in AD groups
- Functional team of employees maps to a Robot Team
- One dedicated Robot Team per AD group
- Robot Teams use queues to run jobs
- Employees in a team share one Robot Team
- Automate Robot ID's, Teams, and Queues

Benefits:

- Minimize target application licenses for Robots
- Minimize Robot licenses
- Citizen developed processes are easy to deploy and secure
- Jobs are scheduled and queued to avoid conflicts within teams
- Separate production namespace allows interactive service accounts
- Easily scale with automated provisioning



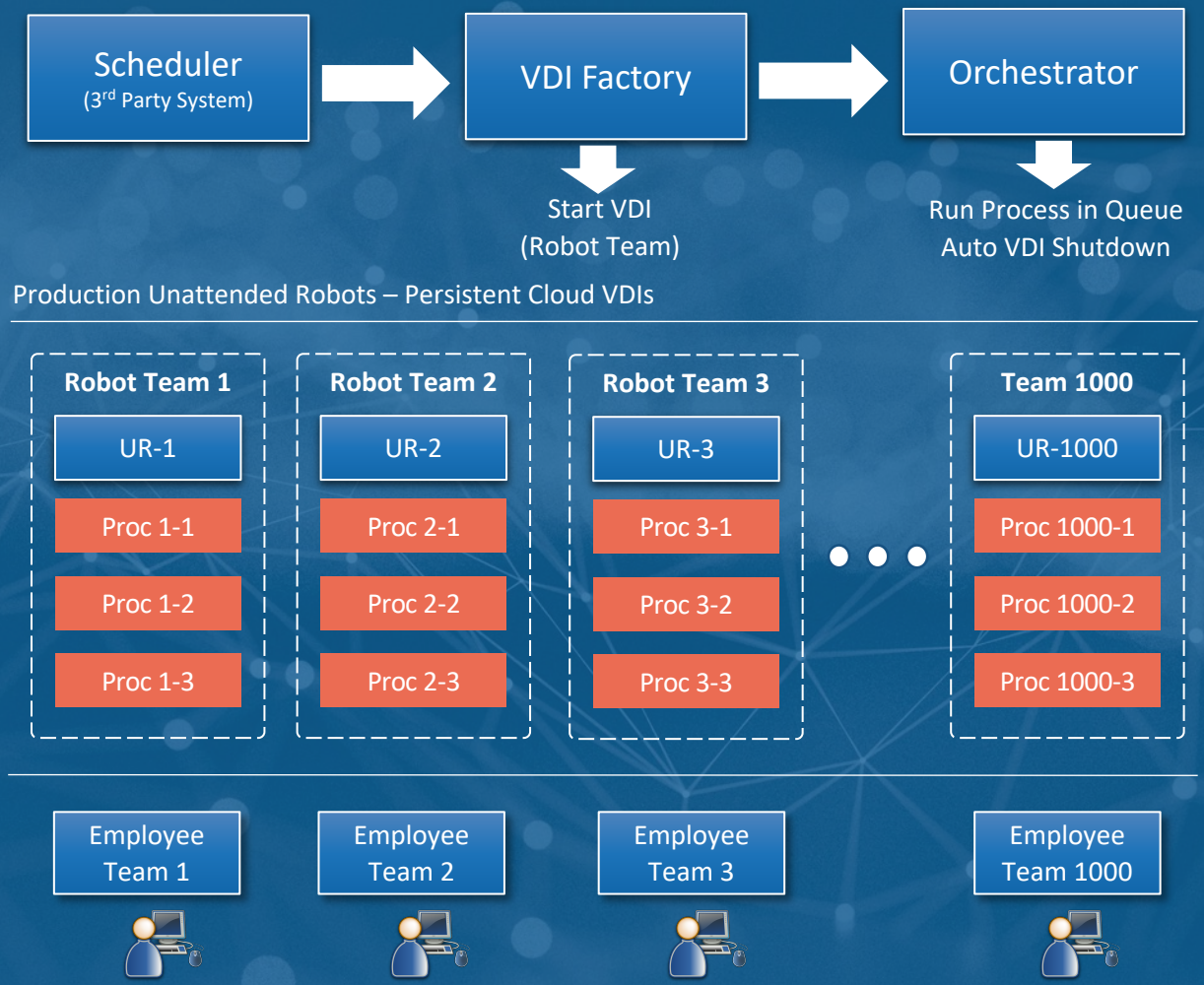
Large Scale Infrastructure

Enterprise Capabilities, Just In Time VDIs, Self Service Scheduling

- Dev/Test/Prod + Stage + HA + DR
- Integrated Cloud (Azure/AWS)
- Just in time persistent VDIs with auto shutdown
- Concurrent Robot license model
- Automated Robot Team provisioning
- Central + BU tenants

Benefits:

- VDIs auto start when needed, recycle when idle
- Minimize compute cycles, cloud costs
- Minimize Robot licenses
- Citizen self service scheduling, external system
- Simplify Orchestrator user access, roles



Operations and Metrics

Monitoring, Reporting, and Analytics

Program Metrics

- Savings
- Processes Live
- Processes in Pipeline
- Transactions
- Planned system changes

Success Rates

- Completed Transactions
- Exceptions Identified
- Errors

Business Analytics

- Transaction Intelligence
- Process Analytics
- Data Analytics
- Opportunity Discovery
- Optimization Discovery

Platform Capacity

- Studio Usage
- Robot Usage
- Robot VDIs
- Robot VDI Capacity
- Warnings & Indicators

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Processes

Finance AP Finance AR IT Ops HR Call Center

Total Processes
75

Productivity

Finance AP Finance AR IT Ops HR Call Center

Total Annual Savings
$4,500,000

Transactions

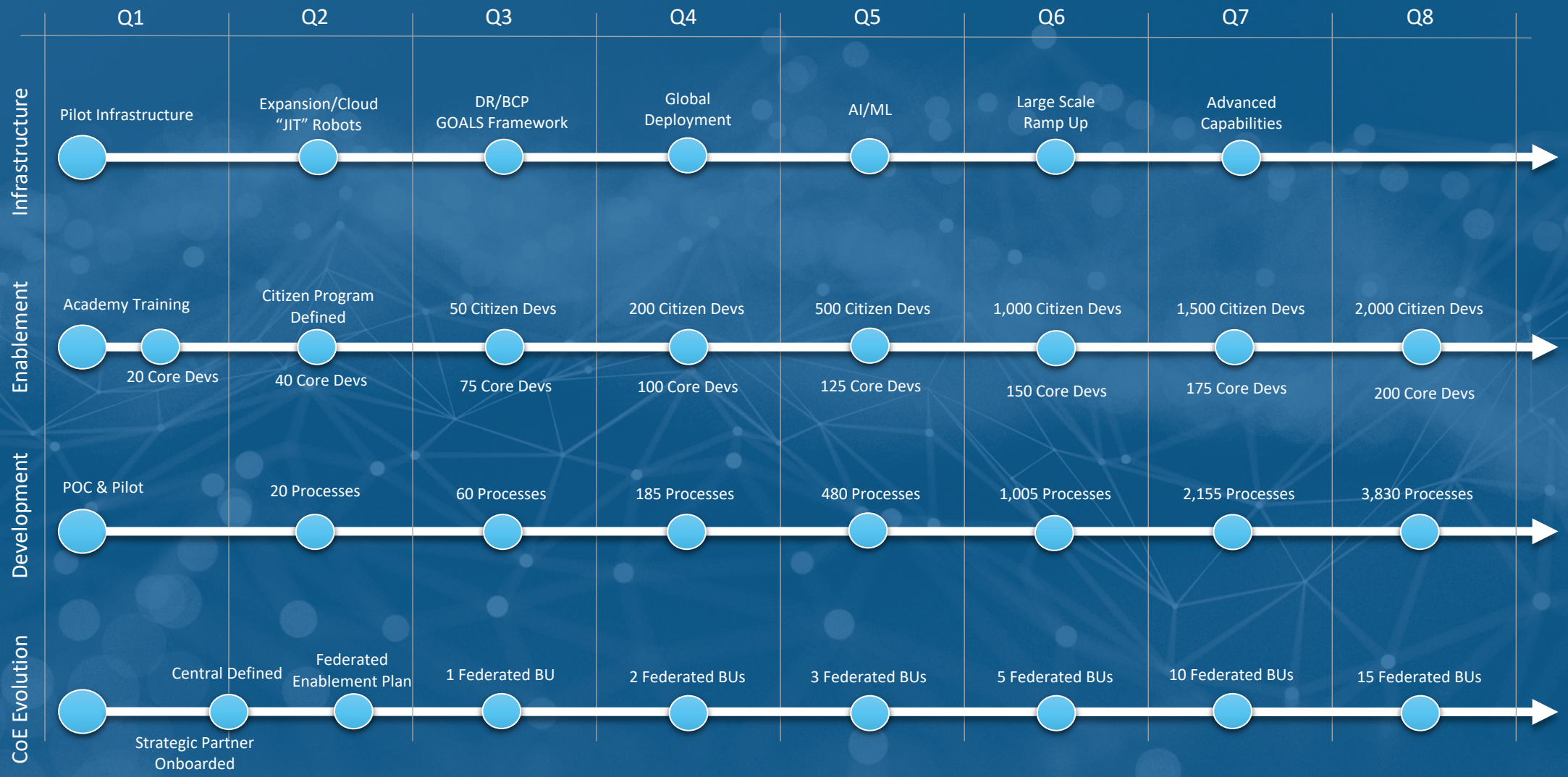
Finance AP Finance AR IT Ops HR Call Center

Total Completed Transactions
70,000

Journey Roadmap

The Leading Enterprise RPA Platform

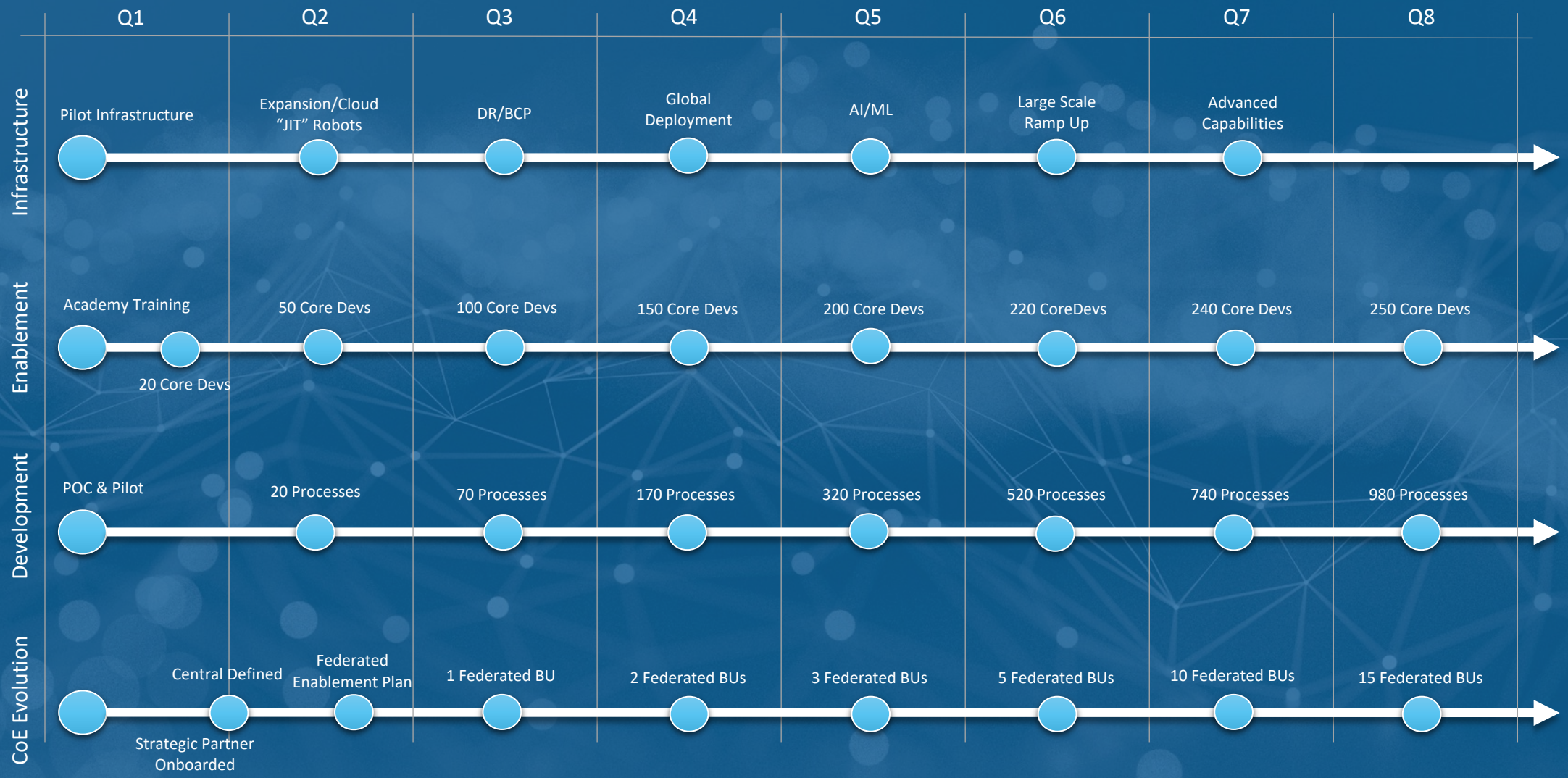
Federated CoE *with* Citizen Development



Journey Roadmap

The Leading Enterprise RPA Platform

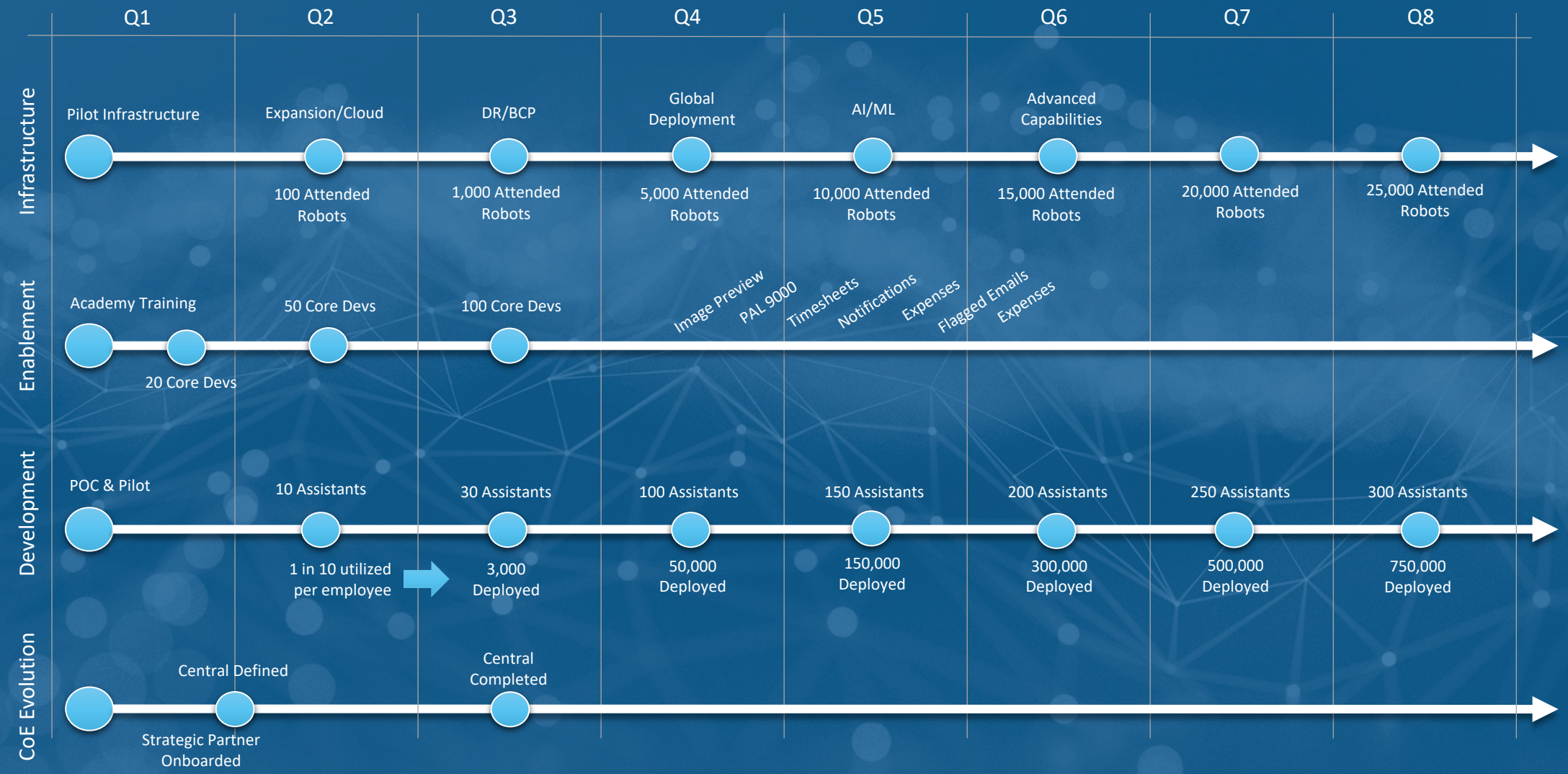
Federated CoE ***without*** Citizen Development



Journey Roadmap

The Leading Enterprise RPA Platform

Central CoE with Digital Assistants (Attended Robots)



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Journey Roadmap

Central CoE with Digital Assistants (Attended Robots)