



# INTRODUCTION TO ROBOTIC PROCESS AUTOMATION

EXPERTS WITH IMPACT™

# What is it? And why should you care?

Robotic Process Automation (or “RPA”) refers to **productivity software capability on top of existing systems** to mimic what humans do on a computer.

## **BOTS ARE YOUR DIGITAL WORKFORCE**

- RPA frees up capacity in businesses and allows organisations to reduce operating costs or reallocate employees to other, more value-driving tasks

## **EXAMPLES OF WHAT A BOT CAN DO**

- ‘Read’ contracts
- Continuously check if transactions are still ‘in compliance’
- Produce reporting with zero manual effort while combining data from any structured data source
- Send and receive messages
- Match invoices
- Perform calculations
- Identify and escalate exceptions
- Compare records or tables across multiple applications

## **HOW CAN RPA KEEP MY COMPANY COMPETITIVE IN 2020 AND BEYOND?**

- Reduce operational cost by 40%+
- Focus your team on value-added tasks and revenue generation
- Increase speed of internal processes
- Maintain accuracy and compliance
- Enable better decision making

# From launch to handover

## Our approach

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A typical approach to adopt RPA is to launch one or two pilots, learn best practices, and then expand the scope into other processes and functional areas.

### PILOT

A pilot will generally last between three and six weeks, and consists of four steps:

- 1. Proof of concept.** Conduct demos, prioritise use cases, identify a core team for the pilot, align key stakeholders and develop the business case.
- 2. Process redesign.** Interview the process owners, map the process, identify triggers, cycle time and systems used and conduct root-cause analysis.
- 3. Programming, testing and roll-out.** Install RPA software, develop an automation solution, test solution, train end users, roll out pilot process.
- 4. Operate and optimise.** Establish a benefit tracking process, replicate pilot in other locations and regions and identify additional opportunity to further automate the future state.

### BUSINESS-WIDE RPA PROGRAM

After the pilot process, we will move forward with the program roll out, which typically takes three to nine months.

- 5. Prioritise new use cases.** Create detailed change management plans for business users, identify production-ready steps and establish pipeline to receive new ideas or use cases from business requestors.
- 6. Replicate pilot approach and establish your own RPA team.** Establish system governance procedures, consider training technical and business users on RPA technology and analyse 'target rich' environments to replicate the RPA pilot approach across the organisation.

# The benefits of RPA

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## REDUCED OPERATIONAL COSTS

**Average costs are much less than  
equivalent FTE costs**

Cost decreases with scale

Easy access from multiple devices  
and platforms

**Reduces change management**

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REDUCED OPERATIONAL COSTS BY

**40–75%**



## ACCURACY & COMPLIANCE

Enables compliance

**Avoids costs arising from human error**

Conducts automated knowledge management &  
diagnostics

Displays real-time unified view

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WORK TO ACCURACY LEVELS OF

**100%**



## INCREASED SPEED & PRODUCTIVITY

**Operates 24/7**

Positively impacts operational metrics

Enhances user experience

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INCREASED PRODUCTIVITY BY UP TO

**30%**



## SCALABILITY & FLEXIBILITY

**Upskills the workforce to  
decision-making roles**

Integrates enterprise systems in  
a non-intrusive manner

Provides guided support through  
structured collaboration

Scales accordingly to demand  
fluctuations and seasonal variations

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FASTER THAN HUMANS BY

**2–3x**

# Considerations

## Don't just 'install software'

When embarking on a RPA journey, organisations frequently underestimate the non-technical complexities. We assist you in making sure that 'all boxes are ticked' to maximise your benefits and minimise change resistance and ramp-up time.



### AUTOMATION STRATEGY

#### What processes should be automated?

- What is the vision, charter, roadmap and measures of success for automation?
- How to identify attractive automation candidates?
- How to prioritise and justify automation investment with a compelling business case?



### TECHNOLOGY STRATEGY

#### What is the right RPA technical architecture?

- What is the right technology solution?
- How and when to embrace more advanced technologies (assisted automation, chatbots, OCR, artificial intelligence/machine learning)?
- How to build a scalable automation architecture?



### GOVERNANCE

#### How do we govern decision making?

- What types of governance bodies are required?
- How should automation investments be funded and who should have what decision rights?
- What are the new roles and responsibilities?



### PEOPLE ENABLEMENT

#### How do we address the impact of RPA on people?

- What kind of skill sets need to be built in order to support automation?
- What should your change management strategy be?
- How do I manage and reskill people for new ways of work?



### OPERATING MODEL

#### How do we operationalise the RPA centre of excellence?

- How to organise around RPA?
- Should RPA be a business or IT solution?
- What kind of controls need to be in place around the technology?



### BOT ENVELOPMENT & SUPPORT

#### How do we integrate RPA into our IT ecosystems?

- What are the right development methodology, tools and standards?
- How do we design for reusability and manage robots as an asset?
- How to manage and monitor an RPA environment?



# RPA cases

## Common uses

### Functional use cases



#### Finance

- Procure-to-pay
- AP invoice processing
- Order-to-cash
- AR collections
- Intercompany transactions



#### Customer Service

- Automating customer contacts
- Scheduled customer communications
- Automated transactions



#### HR

- Onboarding new employees
- Payroll processing
- User access controls testing



#### Supply Chain

- Inventory management
- Automated Bill of Material (BOM)
- Shipment tracking



#### Sales

- Sales quote automation
- CRM updates
- Aggregating marketing intelligence data



#### IT

- User access reviews
- Server monitoring
- User setup and configuration



#### Tax

- Data extraction
- E-filing

## Industry use cases



### Banking

- Automated loan application process
- Automated customer account management



### Healthcare

- Patient records management
- Member eligibility and billing
- Part number creation



### Retail

- Automated inventory status updates
- Order processing



### Telecom

- Collection of client data from phone system
- Extraction of competitor data



### Energy

- Automated land management well records
- Automated synchronisation of well data



### Insurance

- Claims processing
- Payments processing



### Utilities

- Customer data management
- Regulatory data aggregation



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## About FTI Consulting

FTI Consulting is an independent global business advisory firm dedicated to helping organisations manage change, mitigate risk and resolve disputes: financial, legal, operational, political & regulatory, reputational and transactional. FTI Consulting professionals, located in all major business centres throughout the world, work closely with clients to anticipate, illuminate and overcome complex business challenges and opportunities. For more information, visit [www.fticonsulting.com](http://www.fticonsulting.com) and connect with us on Twitter (@FTIConsulting), Facebook and LinkedIn.

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