Aceni

White paper

Think big, start small: introducing Robotic Process Automation for outbound communications

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Foreword.

Consistent and rapid advancements in technology have generated fierce competition for many industries. As a result, organisations are putting pressure on department heads to increase productivity, whilst also streamlining costs.

Many experts believe organisations who are early-adopters of automation technology will be the ones who gain the competitive edge: higher productivity, cost reduction, improved customer service and a more engaged and focused workforce.

In this paper we explore one of the automation technologies that are transforming the world of industry: Robotic Process Automation (RPA). We'll cover what RPA is, what it isn't and the many business benefits it creates. We'll focus on how you can achieve process automation success by starting with smaller projects that can be implemented in weeks not years. More specifically, we'll discuss automation projects for the communications you send out of the business to customers, suppliers, and employees. We'll also provide real business examples of RPA in action, showing how organisations, and departments, are successfully implementing and using automation tools for their outbound communications.

This white paper will be valuable for those who are at the start of their Robotic Process Automation journey and looking for advice and best practice on small scale automation projects.

Key takeaways

- Your human and digital workforce can coexist, working to their own strengths.
- Think big, start small with manageable process automation projects you can build and expand.
- Choose a Robotic Process Automation vendor who has the ability to scale with you as your business needs change and technology evolves.

We hope that you find this white paper useful and we look forward to hearing your feedback.

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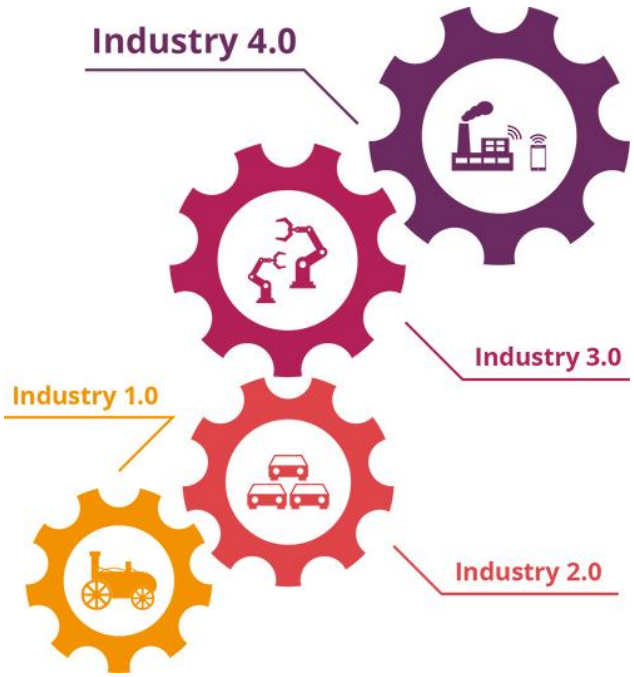
The 4th industrial revolution.

Smart technology has been playing a major role in our everyday lives for over a decade. Now, it's transforming the world of industry. Many experts believe we're entering the fourth industrial revolution, also known as Industry 4.0.



In the first industrial revolution we saw a move from traditional farming to large factory production. The second introduced Henry Ford's mass production era and the assembly line. Then the third industrial revolution saw the arrival of computers and the beginnings of automation, where robots and machines began to replace human employees on the factory floor. The fourth industrial revolution will see the move towards digitisation, where physical and digital technologies will combine to create organisations that are interconnected and interoperable.

Many organisations have some element of connectivity, mainly physical to digital processes (capturing information from the physical world and creating a digital record) and digital to digital processes (sharing information and insights using advanced analytics).

It is the process of moving back to physical from digital, so the ability to take information that has been analysed digitally and make changes or act upon them in the physical world that really adds value for Industry 4.0.

There are many technologies that are influencing the new industrial revolution: robotics, Internet of Things, cyber security, the cloud, blockchain, augmented reality, big data and analytics and artificial intelligence, just to name a few.

Organisations everywhere are thought to be able to benefit from using Industry 4.0 technologies to help make existing operations more efficient and cost effective by responding to the challenges of increasing cost pressure, evolving customer behaviours and an unstable competitive environment. Organisations will be able to offer proactive, truly customised services through multiple channels.

In this paper we're going to take a more detailed look at one of the technology tools that form the building blocks of Industry 4.0: Robotic Process Automation (RPA).

What is Robotic Process Automation?

Robotic Process Automation (RPA) is software, or a set of tools, that can be programmed to use structured data and logical rules to complete routine tasks. It's best suited for processes that are repetitive, time-critical, prone to error, data-driven and rules based.

Consider your organisation or department, what are the repetitive, labour-intensive, clerical tasks that your teams are carrying out? What data do they download, update and put in to different systems? What information needs to be merged, consolidated and output on customer, supplier or employee documents? What do you need to track and monitor? And the big question is how much time do staff spend carrying out these tasks?

Most of these tasks are core to how the business operates, but aren't often core responsibilities of employees. RPA can mimic human actions and automate these tasks easily and is less disruptive than other technologies because its outcomes are often valued by human employees. Think of it as a back-office processing centre but without the human resource. All those mundane tasks that employees loathe because they take a long time to complete and are distracting them from completing higher-value work, can be automated.

Automation is not a new concept, but RPA and other automation tools are taking it to an entirely new level, in which physical and digital systems connect, communicate and cooperate with each other and with human employees in real time.

What RPA isn't.

Artificial intelligence (AI) is one of the technology terms that often get mentioned alongside RPA in discussions around automation. AI can learn, it can interpret and analyse data, recognise patterns, make predictions, suggestions and recommendations. With RPA you have to set rules and basically tell it what to do, whereas AI will 'think' and 'learn' for itself and then act on what it thinks is the correct solution.

AI is powerful, but can be very disruptive. It is typically more expensive and can take longer to implement than RPA because it requires you to understand a process in great detail and be able to build complex scenarios for the intelligent automation to work from.

If you're just starting out on your process automation journey be aware of artificial intelligence, but it's worth considering smaller RPA projects that you can implement in weeks not years.

What are the business benefits of RPA?

Advancements in technology have allowed organisations to evolve and offer services that were once unimaginable. However, as the cost of such technology decreases, it's becoming much harder for organisations to differentiate their offering from competitors. As a result, organisations need to see an increase in speed and accuracy, whilst also reducing costs, to gain that competitive edge.

A logical starting point, is therefore to look at reducing the millions of hours employees waste on mundane, repetitive, labour-intensive tasks that could be automated.

Using Robotic Process Automation tools to automate internal processes offers numerous business benefits that can help organisations beat off the competition. RPA is non-invasive technology which leads to considerable saving potentials. RPA can seamlessly integrate with existing business systems, so it can be developed and changed with ease. As well as cost savings, it can improve consistency, boost productivity and increase efficiency.

Cost savings

Some organisations have reported up to 75% savings.

Flexibility & scalability

RPA can be scaled up or down to meet fluctuating volumes.

Improved consistency

Repetitve tasks completed consistently can remove output variations.

Boost in productivity

A 24 hour service can be delivered with a real-time response.

Increased efficiency

Robots can complete tasks in minutes rather than hours.

Staff time refocused

Employees can focus their time on high-value work.

Some of the most rewarding benefits include:

- **Cost savings** - due to the far reaching business uses of RPA, many organisations have yet to implement it on a wide-scale, but some organisations have reported up to 75% savings. Many firms say the percentage saved was higher than expected. Organisations have also benefited from a quick return-on-investment, in many cases less than 12 months.

- **Flexibility & scalability** - due to fluctuating seasonal business patterns resource planning can be extremely difficult. Robotic Process Automation technology can be scaled up or down as you need it, so you shouldn't have to think about the resource needed as RPA instantly adapts to your business needs.

- **Improved consistency and accuracy** - even the most conscientious and driven employees can make mistakes and are even more likely to do so when completing repetitive and mundane tasks. Small mistakes can cost organisations dearly. Using RPA the right result, decision or calculation is made every time and output variations are eliminated with consistent processes.

- **Staff time refocused** - many early commentators were concerned with the impact of RPA technology on human jobs. Robotic Process Automation should work alongside your human employees, not replace them. Their core activities are still there but now they can focus on these and more high-value work, and do the jobs only humans can do: creativity, making connections, strategy.

- **Increased efficiency** - tasks that previously took hours by humans can now take seconds or minutes to complete by a robot. Faster processing time will lead to an improved experience for both internal and external customers, to give you the competitive edge that is needed in your fast-paced industry.

- **Boost in productivity** - robots do not eat, sleep, take holidays or phone in sick. People expect a real-time response and 24 hour service, which you can now deliver effectively with the help of automation tools. Human employees also become more productive as they can now handle more customers, more projects, and more challenges without having to worry about completing the mundane, administrative tasks.

How to implement RPA successfully for outbound communications.

When providing examples of business processes to automate, many RPA experts and vendors focus on inbound communication, the information that comes in to your business, for example taking a document, scanning it, analysing the content and inputting the information into one of your operating systems.

There is no denying there are many benefits associated with this automation process. However the scope, content and layouts can be very broad and you can't control the business systems that are producing them. Therefore the RPA tool you choose to implement will have to be able to cope with many different formats. This makes your automation project more complex, require more intensive testing and will take longer to implement.

If you compare this with outbound communications, the information you send out of the business to customers, suppliers or employees, they come from centralised business systems. You have great knowledge of the people and processes involved in that activity, as a result your automation project is much smaller.

Consider the time-critical documents you send to customers, e.g. invoices, bills and statements, the data and information needed for these documents will be generated by your internal systems. However, incorrect data or inconsistent messaging and branding can have a negative impact on the customer experience and ultimately affecting your bottom line. Sending an invoice to a customer with a £0 balance creates extra work including calls into your customer services teams and the cost of reprinting and resending the letter.

RPA in action #1

RPA rules save an insurance provider £357,000 annually.

An insurance provider decided to automate the letters they sent to new and existing customers. The organisation has a legal requirement to deliver customer documentation within a specified time period. Overstretched customer service teams have limited resources to meet fluctuating demand and monitor the quality of outbound documents.

RPA helped improve the accuracy and speed of document distribution. Now, hundreds of service agents submit documents to a secure online production hub. Here Robotic Process Automation (RPA) rules confirm each document meets business standards. Complying files are immediately printed and despatched. Rejected documents are quarantined for business administrators to correct.

The control and automation of documents has enabled the team to save the time of 17 people per year, team members who can now focus on customer service rather than mundane back-office processing.

Rather than relying on overstretched teams to ensure the accuracy and consistency of these outbound communications, you could implement RPA rules to check the information and ensure your business standards are being met. This can be completed automatically in minutes rather than the hours it would take a human employee.

Let’s also consider the communications you send to employees, e.g. payslips, pay award letters, and contracts. With a diverse workforce your employee document distribution process may be fragmented, expensive and risks non-compliance with legal obligations. By automating production and distribution using RPA tools, these documents can be presented in print or digitally in a fraction of the time, releasing days of resource for human employees to focus on other priority projects.

Starting with RPA for outbound communications will enable you to demonstrate to the business all the benefits highlighted previously. You'll be able to build your automation knowledge for projects going forward.

RPA in action #2

RPA rules dramatically reduce missed appointments for a health care provider.

One healthcare provider decided to automate the production and delivery of appointment letters. On a daily basis, admin staff and clinical nurses spent hours creating thousands of appointment letters, using a high number of different letter templates. This resulted in patients receiving the wrong information, or the letter arrived after the appointment date.

Using a third-party RPA partner, RPA rules were created to make sure any data that met specific requirements was matched with the correct letter template. Other automation rules were put in place to control the distribution of documents, reducing the amount of missed appointments.

As a result of RPA, staff time was re-focused on higher-value work. There were reduced errors by removing human-decisions and inputs. Without changing their core systems they were able to implement RPA applications to automate their appointment letters in months not years.

Next steps.

The pressure to automate can feel daunting, but don't worry it doesn't have to be a big, costly project that will take years to implement. Think big, but start small. You're more likely to achieve automation success by piloting smaller projects first, learning from them and then building on them with the view to implement on a wider-scale.

Begin your journey by assessing your processes and understanding which ones will benefit from being automated. RPA tools work best for processes that have simple actions, repetition, standardisation and are impersonal. Don't automate complex, varied, creative or personal tasks.

You will need buy-in from other departments across the business including, the C-suite. To gain their approvals you need to understand what RPA will mean for your business, what processes would benefit from being automated and where RPA will add the most value.

You don't have to travel this RPA journey alone. Identify and choose an automation vendor that is agile and flexible, and that can evolve with you.

Make sure you test what works for your business. RPA is flexible, scalable and can be easily adapted to suit your needs. Analyse the areas that achieve the most success and then evolve and extend these across other business functions. The whole business can benefit from RPA.

Are you ready to start your Robotic Process Automation journey?

Talk to us.

By 2020, 72% of organisations are expected to have started their RPA journey.

If you're taking first steps in to RPA, why not talk to one of Datagraphic's RPA experts? Our Aceni suite of applications has specifically been designed to make automating outbound communications a reality for organisations: without capital expenditure, software licence fees or lengthy implementation projects.

Start seeing the benefits of RPA in months not years.

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Aceni

This white paper has been prepared for you by Datagraphic, a secure UK Strategic Document Outsourcing (SDO) company.

Datagraphic's Aceni suite – six powerful Software-as-a-Service (SaaS) applications – developed to transform the way organisations securely automate, control and output time-critical communications.

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