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TEAM

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# RPA Reality Check

Get to Grips with the Hidden Truths Behind  
Successful RPA Deployments

# Discover the hard facts, reality-based challenges and proven deployment tips to scale your RPA footprint smartly

Many enterprises have embarked on their journey towards higher levels of automation. However, they are finding that scaling and driving through the business benefits is more complicated than anticipated. To unleash the real value of their investments in robotic process automation (RPA), organizations should embrace the potential of a blended human-robot workforce.

Attended Automation is the glue that binds a human-robot workforce. Building on this relationship delivers higher levels of performance than one could get from people or technology alone. Developing this high-performance digital workforce demands strategic focus and investment, with a clear roadmap for scaling and broadening the use of automation technologies across the enterprise.

Focus and investment are especially true in the context of the COVID-19 pandemic. Some organizations have accelerated their investments in RPA and Attended Automation to keep pace with high customer service volumes, support employees working from home, and ensure business continuity during these challenging times.

Many of these implementations were tactical in nature, designed to address a sudden and urgent need to enable a remote workforce and to provide customers with efficient and reliable digital channels when they could not go to physical stores and offices. But the next step should be unlocking long-term value from these investments and using them as a catalyst for long-term business transformation.

*“ The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency ”*

Bill Gates



# How making humans part of the journey will improve the outcome of your automation journey

The hype about RPA and Artificial Intelligence (AI) is reaching fever pitch, with enterprises in every industry rapidly ramping up their spending on intelligent automation technologies.

While enterprises are reaping benefits such as efficiency gains, cost-savings, and customer service improvements from their RPA deployments, they are struggling to scale them into transformative programs. There are several key reasons why some organizations are disappointed with the results of their RPA programs and projects:

- **Processes are not optimized for automation:** Enterprises overlook the importance of optimizing business processes before automating them and taking a view from the robot's perspective to best optimize each process for automation. Each step of the process should be structured with an understanding that robots function differently to humans. Robotic technology can achieve significant efficiencies across all of the organizations' applications, e.g. minimizing navigations, data extractions, data comparisons, calculations and more.
- **The lack of a strategic roadmap:** Many RPA projects begin as piecemeal, bottom-up initiatives with no roadmap for ramping up deployment and transforming the workforce. The ad-hoc nature of many RPA initiatives means that organizations do not consider RPA's place in the bigger picture. They may either choose processes that are not well suited to automation or use the incorrect RPA tools for their needs. Enterprises may also find that they need to redesign and rework processes when scaling automation.
- **Not all processes can be automated:** There is a significant gap between the roles employees carry out each working day and the tasks that can be fully automated using today's technology.
- **No dedicated internal champion:** An internal champion is not only essential during the initial deployment of the first few automations, but also in the continuous cycle of discovering new automation opportunities and introducing them into the automation project scope.
- **A lack of the correct blend of business and industry skills:** Because RPA operates in a space where business and IT intersect, technical skills are not enough on their own to drive success. Some organizations do not build the in-house skills they need to drive successful RPA projects or do not have someone with the right experience to support them. The focus often falls either on acquiring people with industry and process expertise or knowledge about the tool. While in reality, success requires a combination of both.
- **Poorly understood costs:** RPA vendors typically do not include the full Total Cost of Ownership TCO – infrastructure, development, support, and training costs – in ROI calculations. Ensuring all operational costs are counted is critical to the long-term success of the RPA program.
- **Fragmented efforts:** Different departments in an organization may be running separate automation initiatives, often with different RPA tools. Combining these efforts helps create a stronger foundation to scale and prevent duplicate spending on overheads, such as licenses, support, and maintenance. It also helps to curtail the political struggles that often hamper automation initiatives.

NICE and PATeam believe that one of the most common shared characteristics of RPA projects that fail to meet expectations is a lack of focus on the human element. Automation is more than a tool to reduce costs by shaving the organization's headcount. Robotic and AI-driven technology has more power when used to augment human capabilities and help people realize their full potential.

Each enterprise needs a roadmap to chart its course from manual processes to full cognitive automation, with a focus on enabling people to become problem-solvers along the way. Bringing together traditional IT development, RPA, and AI in a unified strategy will allow organizations to graduate beyond small-scale automation projects to successful programs that span the enterprise.

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Organizations should decide what combination of RPA, Attended Automation and AI they need, based on process complexity and the inclusion of some human decision points.

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# The reality of RPA Investments during the pandemic

The economic upheaval of the pandemic means that it's more important than ever for organizations to stretch every dollar as far as possible and to elevate efficiency without compromising on quality or customer experience. Against this backdrop, some enterprises find themselves tempted to take shortcuts in their automation journey to unlock ROI faster. These tactical decisions may be valid during times of crisis, but they should not allow quick and dirty tactics to impede their longer-term strategy.

“ *A shortcut is the longest distance between two points.* ”

Charles Issawi

When systems integrators and in-house developers cut corners in a bid to jump-start ROI, in the longer term, the costs of keeping these automations may nullify any gains. Consider the example of a bot that runs 15 minutes per transaction versus a properly optimized one that executes the same process in less than five minutes.

Not considering this may waste precious compute time but also leads to high failure rates. When a high number of business exceptions happen, the bots may be processing a much lower percentage of the actual work than the impressive dashboards might indicate.

We encourage organizations to look at both short-term and long-term considerations, when intending to make sustainable investments that benefit them beyond the pandemic. Blending humans and robots is a better fit at this time for most processes than forcing them into an RPA-only box. NICE RPA provides an out of the box framework and solutions for such attended automations.

Attended automation can offer immediate advantages during this time, equipping the organization and its people to cope with higher work volumes and the need to work faster. The human attendant can address exceptions on the fly, rather than allowing them to pile up. Another useful tactic is to split a process into smaller chunks that can be ping-ponged between a robot and a human.

Surviving this crisis, many companies will be looking to grow their remote teams. Making the right investments today to automate processes and streamline onboarding will yield tremendous value in the future by establishing a firm or robust work-from-home working environment.

RPA does not bring the most value when used as a blunt instrument, but as a scalpel in these times. There will always be complications, which will require human input to resolve fully. Embedding data collection, analytics and key performance indicators into the design of every process automation will result in success and continuous improvement.

# Best practices for getting the most from human and robotic teams

In our experience, organizations can achieve better ROI from their automation investments when the automation program has the full support of the top management team. A strategic roadmap that allows the business to start small and rapidly scale is another key success factor. It is also vital to build the institutional structures and capabilities needed for effective stewardship and execution of the automation strategy. Finally, change management and support for the human workforce are also essential for success.

## 1 Drive through change with the support of top management

- Scaling usage of RPA and attended automation across the enterprise will have a profound effect on your business and how it operates. From IT and process governance to people management to the customer experience. For that reason, it is vital to ensure that projects that start from the bottom-up will gain executive support as they scale and align with the broader company strategy.
- For an automation initiative to be successful, there needs to be buy-in from the entire organization. It is imperative to inspire the people - from the bottom of the organization to the top - to become problem solvers. The people should understand what automation can do to become ambassadors and play a part in continuously creating new use cases for automation.

## 2 Walk before you run

- Organizations that want to drive true value from RPA, attended automation, and AI should start small, but with scalability in mind. Begin by identifying processes where optimization and automation can deliver high-impact results in a relatively short timeframe, learn from the deployments, and iteratively grow them. For example, stay away from processes that are long, infrequent, and complicated.
- RPA and attended automation are a better place to start than diving into advanced, AI-powered cognitive automations. Starting with fewer simpler, more contained automations lets the organization learn about the potential, pitfalls, and benefits before it commits to expensive decisions across multiple processes that it later regrets. For example, we have seen many enterprises create chatbot assistants for in-house workers, only to find that their employees would rather have a simple pop-up for help and guidance.
- Bottom-up projects, driven by a specific department without the support of top management, usually begin with small budgets because they first need to prove the value of the automation project to the broader business. This approach is effective when needing to kick-off an automation project with a limited budget, but it can prove to be challenging when attempting to scale. When embracing this approach, it's essential to carefully plan the budget spend to safeguard against overspending too quickly. An organization or department should thus not embark on this journey on its own but instead seek expert support from the broader market.
- When choosing a partner, an enterprise should ask how many implementations a service provider has done from end-to-end, how large they scaled, and for contactable references for those implementations. Starting with RPA is easy – scaling is where it becomes interesting. To ensure long-term success - continuous learning, and sustainable partnerships with peers are essential.

### 3 Create automation departments

- The structure and capabilities of the automation department is a critical success factor in scaling automation. As a business grows its usage of robots and AI, it should look at how the automation team or department will source and provide three key competencies - the Center of Excellence, the Robotic Development Center, and Robotic Operations Center. These can be combined in one team or be separated - consider what will work best for the organization rather than adopting a 'one-size-fits-all' approach.
- Enterprises use a wide range of models for these three competencies - from selective outsourcing of technical functions such as operations to managing most of them in-house. There is a choice of centralizing these functions, taking a decentralized approach, or using a federated model. The correct method depends on the size of the business and its in-house skills.
- **Center of Excellence (CoE):** This team or department will focus on developing knowledge and expertise around automation, and related best practices for governance, optimization, and automation of business processes. It will also provide leadership and support for automation. A CoE should be in-house as it needs to fit into the company's governance structure. For organizations that are just starting, having a fully-fledged CoE in the early stages creates a risk of getting caught up in bureaucracy. The process of setting up a CoE is best not done in a linear fashion or isolation - it is a dynamic entity, so it is essential to leverage existing knowledge in the market.
- **Robotic Development Center (RDC):** This department or function is tasked with planning, developing, building, and testing new automations. In a larger enterprise, it will often comprise a mix of in-house, externally sourced, on-site, and offshore resources. Success depends on clear communication between parties – no matter where they are based or whether they are employees or contracted from a vendor or service provider.

For example, having business analysts, team leads, and senior developers on-shore while having junior developers, testers, and scrum masters reside offshore could be an efficient and cost-effective mix. Some companies might choose a specialized delivery partner for most roles and retain only a program manager and subject matter experts internally.

This structure should allow the enterprise to either ramp resources up or down, depending on its automation backlog. A coherent, shared development methodology, with rigorous project and program management is a crucial ingredient for consistently successful automation projects.

- **Robotic Operations Center (ROC):** Robots need to be supported, maintained, and enhanced once they integrate into the enterprise. It makes sense to use dedicated people or teams for this work so that the robotic development team do not spend all of their time maintaining existing deployments.

Organizations often forget this because the people developing automations can usually also take care of maintaining and enhancing them in the early phases of the journey. As more processes go live, developers can quickly become overwhelmed with maintenance, support and enhancement requests, which cripples the output of new automations and cost savings. Realizing this at an early stage prevents later stagnation in the pipeline.

Having an outsourced ROC might be the most cost-effective way to go since much of the work required from this department is standardized. Working with specialized partners to take on this aspect of automation also provides a predictable expense, which an organization can use in the initial ROI assessment of any automation.

## 4 Get the Human Aspect Right

Change management is a vital component of any automation program or strategy. Organizations should be ready to support colleagues as they transition from routine, repetitive work and reskill themselves to focus on adding value, rather than just meeting compliance and efficiency-driven targets.

Take, for example, Bob. Bob works for your company and is happy with the work he is doing. He has been working for you for many years and has become an expert in his work. His co-workers consider him to be one of the most valued people in his department. This is what Bob's profile looks like:



A central part of Bob's work is now in the pipeline for automation. How can we enable him to keep on delivering value to the company? Traditionally, an administrator appreciates efficiency and compliance with an existing process. The efficiency now is delivered through a robot. Administrators like Bob will now be process experts, working together with bots to provide quality and spot new automation potential.

Bob's new role looks quite different, focusing on the value he brings through his long experience in the company.

### Before Automation

#### Tasks



Get in contact with internal/external customers and retrieve data from several systems



Validate a data file he receives daily and upload it to two different applications



Manages errors caused by him or his colleagues

#### Competences



Efficient in his everyday tasks



Task expert rather than overall process expert



Knowledgeable about the applications he works with on a transactional level

### After Automation

#### Tasks



Get in contact with internal and external customers answering questions that the bot cannot answer automatically



Supporting the RPA developers to automate manual processes



Checking error logs from the data uploaded by the robotic workforce

#### Competences



Subject matter expert with vast experience in the organization's administrative processes



Compliance and quality: up to date with existing rules and regulations



**Effectiveness:** understands the impact of technology and process improvements

# Key Elements to Successfully Scale Automation Projects

**Creating the organizational structures to oversee your automation journey and strategy:** As your organization grows beyond small, ad-hoc deployments of robots, it will need to put in place formal structures such as centres of excellence to help manage and scale automation projects.

**Enabling the people:** Think about how automation can enable, rather than replace people. Your organization needs to have a strategy to create a digital workforce made up of people and technology working in harmony.

**Using the right automation:** Each enterprise needs to evaluate which processes offer the most potential for automation carefully, then apply the right automation tools to the job. This can also be considered as process optimization or traditional IT development.

## Conclusion: Let's get to grips with the reality of automation

Attended automation is obtaining increased traction in the global market due to the multiple value drivers delivered to organizations as well as the unique ability to seamlessly combine the strengths and talents of robots and humans in the dynamic and digitally diverse workplace of today. Since attended bots augment human talent and potential, the growth of human bot collaborations means an accelerated growth and advancement of human abilities, that were previously unattainable.

### About NICE

NICE (Nasdaq:NICE) is the worldwide leading provider of both cloud and on-premises enterprise software solutions that empower organizations to make smarter decisions based on advanced analytics of structured and unstructured data. NICE helps organizations of all sizes deliver better customer service, ensure compliance, combat fraud and safeguard citizens. Over 22,000 organizations in more than 150 countries, including over 80 of the Fortune 100 companies, are using NICE solutions. [www.nice.com](http://www.nice.com).

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### About PAteam

PAteam was born from professionals who have been part of companies that helped bring RPA to the world stage. The whole team is organized around the belief that RPA is the 4th revolution which will exponentially grow productivity, customer service and employee satisfaction. We aim to create a world class organization fully dedicated to realize the full potential of RPA and it's adjacent technologies and to help our customers be the innovative leaders in their own domain. Empowering companies whose thoughts and ideas make them successful, by allowing them to independently take control of what is most important.

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