THE SOFTOMOTIVE PEOPLE1st APPROACH FOR RPA - INTRODUCING A NEW PERSPECTIVE

A PRACTITIONER'S GUIDE

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We talk automation

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AN OVERVIEW OF THE SOFTOMOTIVE PEOPLE¹ˢᵗ APPROACH TO RPA

RPA is quickly becoming a mainstream business activity to drive better performance. However, traditional approaches to RPA lead to higher costs, increased project risk, less innovation and low people engagement.

It is a time for a People¹ˢᵗ Approach to managing process automation.

The Softomotive People¹ˢᵗ Approach to RPA is a totally new way to deploy RPA. The power of innovation is firmly in the hands of those who have the knowledge, skills and understanding to select and develop the best tasks and processes to automate – the people that do the work. In a People¹ˢᵗ world, everyone is a "Citizen Developer."

Engaged people can be expected to ask the question, "what can I automate today to save even 1% of my time?" Magnify this saving over one year for the whole organisation and the numbers really add up.

A People¹ˢᵗ Approach to RPA reduces cost and project risk, supercharges innovation and increases people engagement. **A brand new business model is needed and this has three phases:**

1 Innovate to empower the many and accelerate performance collaboratively.

2 Incubate to filter and nurture the best output from the innovation phase.

3 Implement to scale what works, with main responsibility sitting with the COE.

Each phase is broken down further into different steps to provide a complete 7 stage blueprint for deployment, underpinned by IT Governance & Enablement.
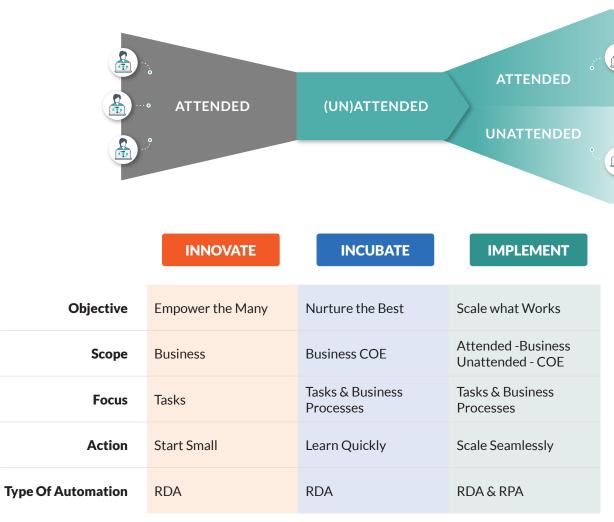
The Softomotive People¹ˢᵗ Approach turns conventional RPA thinking on its head by firmly putting people before robots to get the best results.

This Practitioner's Guide provides a detailed breakdown of the People¹ˢᵗ Methodology, including the **7 stage blueprint** for deployment.

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A PEOPLE1st BUSINESS MODEL FOR MANAGING PROCESS AUTOMATION

A brand new business model for managing process automation is required to address a People1st Approach.

	INNOVATE	INCUBATE	IMPLEMENT
Objective	Empower the Many	Nurture the Best	Scale what Works
Scope	Business	Business COE	Attended -Business Unattended - COE
Focus	Tasks	Tasks & Business Processes	Tasks & Business Processes
Action	Start Small	Learn Quickly	Scale Seamlessly
Type Of Automation	RDA	RDA	RDA & RPA

Source: Softomotive

This new business model splits managing process automation into three distinct phases, the 3 "I's": Innovate, Incubate and Implement. Each phase is broken down to different steps to provide a 7 stage blueprint for the adoption of this new approach, underpinned by IT Governance & Enablement.

THE 3 "I's"

INNOVATE → INCUBATE → IMPLEMENT

INNOVATION STAGE

The key objective for this phase is to empower the many and its scope is right across the business or in selected departments. The focus is on repetitive, mundane tasks that people perform day-to-day and the aim is to invite as much innovation as possible. There are two key steps to the Innovate phase, including empowering the many and encouraging collaboration.

INNOVATE

Empower the many → Encourage collaboration

Empower the many

This brings the democratization of RPA alive and involves providing everyone with their own "Digital Assistant", providing the mandate to automate whichever of their day-to-day tasks they want to; and any necessary training

▸ **Provide everyone with their own digital assistant** – this will become commonplace as everyone having Microsoft office installed on their workstation. In this case, it will be to put mundane work on autopilot to free up valuable time to do more interesting, productive work or even to take a "Latte moment" when the Digital Assistant carries on working without you.

▸ **Provide the mandate to automate** – aside from IT setting some organisational boundaries as to what can be automated, everyone should have the freedom and positive encouragement to automate what they like.

▸ **Provide training** – a key success factor of "empowering the many" is to ensure that the RPA automation tools are intuitive and extremely user friendly. This means that one does not need to be a programmer to get started and anyone can create their own automations quickly and easily. Even so, online training needs to be on hand if it is needed, especially for people who want to get involved in automating more complex tasks.

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This is where the power of the citizen developer come to the fore and automation discovery and innovation starts to become supercharged. Once innovation is stimulated, it becomes a question of how quickly this can be scaled to drive maximum impact in the business. This is when collaboration becomes important.

Encourage Collaboration

In the world of People[1st], collaboration can be on a spectrum from sharing successful automations within the company, with other companies or even publicly. The focus here is on internal collaboration.
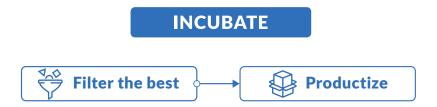
Basically, the aim is to have an automation store available to people to build and access a user library or database of existing automations. This allows people to either upload or download existing automations in order to accelerate the deployment of successful innovation throughout the business.

Together, these first two steps drive innovation at scale in order to have maximum impact on the business.

INCUBATION STAGE

The key objective for this phase is to nurture the best output from the innovation stage. The main responsibility for this typically falls to a centralised department, more often than not called the Centre of Excellence (COE). The focus is on both automated tasks and processes with the aim to learn quickly what could be deployed more broadly across the business for best results.

There are two key steps to the Incubate phase, including filtering and productizing automated tasks and processes to the point they are ready to be deployed and scaled.

INCUBATE

Filter the best → Productize

Filter the Best

Over a period of time, with the volume of automation innovation going on the best task automations will naturally rise to the surface as the most popular task automations are shared and used via online collaboration tools.
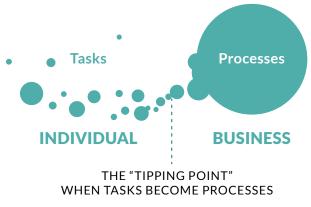
Productize

There are generally two opportunities for identifying opportunities to engineer automations – either engineer complete processes or as part of a value stream. This engineering is best done in the COE for central oversight.

▸ Engineer complete Processes
   In their simplest form, processes are the sum of their underlying tasks. Driven by collective innovation rather than by design, a tipping point might be reached when individual tasks collectively become a part of or complete, end-to-end processes.
   At this point, there could be the possibility of incubating these until they are ready to scale, either in an attended or unattended mode.
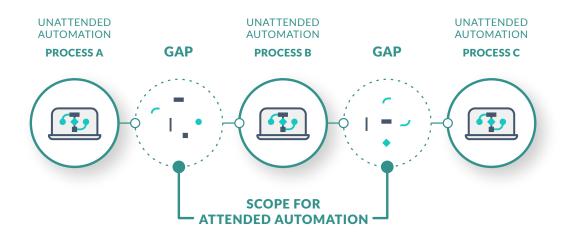
Tasks   Processes

INDIVIDUAL   BUSINESS

THE "TIPPING POINT"
WHEN TASKS BECOME PROCESSES

Source: Softomotive

▸ Engineer Value Stream
   There are not that many processes which can be fully automated end to end and this leaves fertile ground between automated processes to nurture task orientated, attended automation.

UNATTENDED AUTOMATION
PROCESS A

GAP

UNATTENDED AUTOMATION
PROCESS B

GAP

UNATTENDED AUTOMATION
PROCESS C

SCOPE FOR ATTENDED AUTOMATION

Source: Softomotive

In practice, both process and value stream engineering routes are likely to be followed by the COE. It is important with a People[1st] Approach to RPA that the "human worker" remains directly in control (in attended mode) even for processes ultimately intended to be operated in an unattended fashion. This will help to streamline development, especially fixing any bugs which might occur.

IMPLEMENTATION STAGE

This is more representative of a business as usual RPA roll-out since in a People[1st] Approach it is the first two phases (Innovate and Incubate) which really make the difference and deviate from conventional wisdom and normal practices.

The key objective for this phase is to scale what works and the main responsibility for this remains with the COE, albeit some activity may reside in the business for improved speed and agility. The focus is on both automated tasks and business processes with the aim to scale seamlessly.

There are three key steps to the Implement phase, including deploying, managing and scaling when ready.

IMPLEMENT

Deploy → **Manage** → **Scale**

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Deploy

Once the tasks (Attended Automation) and business processes (Unattended Automation) are production ready, respectively they can be deployed to augment the human worker or perform end-to-end processes in a lights out fashion.

The initial deployment should focus on one function or geography before scaling to full implementation at the final stage.

Manage

This is very important for both automated tasks and processes. Businesses are dynamic and ever changing and this means the deployed automations need to be managed and cared for. This falls into two camps – the maintenance of automated tasks and the management and care of the unattended automation.

▶ Maintenance of automated tasks (Attended Automations)
  Each automated task should have a nominated owner in the business. If an update is required to the automation, for instance, as a result of an application change, its owner should take this on board and share the updated task automation via the collaboration tool.

▶ Management of automated processes (Unattended Automations)
  This is the more conventional approach to managing Enterprise RPA including the likes of control, auditing, security etc. There is no need to go into detail here since existing best practices which are well established are transferable to a People1st environment. There are plenty of tools as part of any leading RPA platform to perform these governance and control functions. However, do look out for innovative features like remote access to "SoloBots" operating in unattended mode to check what is going on; or video recordings of automated processes to easily and quickly determine the root cause of any failure.

Depending on the circumstances, either automated tasks or processes might need to go back a stage if further incubation is required, particularly as updated automations will need to be re-assessed to see they are production ready.

Scale

The final step is to scale seamlessly what works. This is simple to say but experience to-date suggests that it is not so easy to do in practice. This is critical because at this stage the business should be maximising the investment it has made by reaping the benefits of having a full enterprise deployment.

It is important to recognize that there are different challenges to deal with when it comes to scaling attended v.s. unattended automation. This is simply because unattended automation can be more easily deployed by the COE. Successful attended automation depends significantly on winning "Hearts & Minds." Whilst the quality of the automation software should speak for itself, it is still too important to be left to chance.

A key question to address in order to successfully scale attended automation is,

Are the right change management practices and resources available, for example, an **"ignition" team** to act as a catalyst for full enterprise deployment, including the appropriate training and support?

What is an Ignition Team?

" A team of RPA experts to help our clients to successfully deploy a People1st approach to RPA by supporting them throughout their journey, especially the Innovation stage at the start and again at the Implementation stage when they are looking to scale. The goal of an Ignition team is to accelerate and broaden the impact of RPA on the business through a combination of training, communication and technical support services, for example, the custom development of complex processes; and by doing so, maximize the business outcomes at each stage. "

Argyris Kaninis, Co-founder & COO, Softomotive

For more information on Ignition teams read "The Softomotive guide on Ignition teams for a People1st Approach to RPA".
https://www.softomotive.com/People-1st-Approach/ignition-teams-white-paper

There are also three additional questions to ask when you are assessing attended or unattended automation solutions to support your journey covering design, technical and commercial features.

First, is it easy to use and intuitive for the end user?
Second, can it scale seamlessly from a technical perspective?
Finally, is it priced to scale?

These three key success factors (KSF's) are required to scale effectively. If any of these are missing it will most likely create problems and disappointment further down the line.
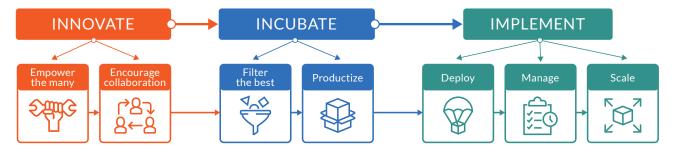
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THE COMPLETE 7 STEP BLUE PRINT
for introducing a People1st Approach for managing process automation

All the steps from each of the three phases can be brought together to form the complete 7 step blue print for introducing a People1st Approach, underpinned by IT Goverance & Enablement.

INNOVATE	INCUBATE	IMPLEMENT
Empower the many	Filter the best	Deploy
Encourage collaboration	Productize	Manage
		Scale

This People1st Approach turns conventional RPA thinking on its head by firmly putting people before robots to get the best results.

IT GOVERNANCE AND ENABLEMENT

It is important that IT is involved at the outset and recognize their evolving role in the new world of Citizen RPA developer when they need to take on a role of enabler as opposed to "game keeper". In other words, the introduction of new practices and ways of operating that set up the business led RPA development for success so it can provide better business outcomes. This path has already been trod by BI and Analytics and now is the turn of RPA. For instance, providing advice on choice of tools, non-functional requirements like TCO, usability and maintainability.

Gartner have developed a number of key recommendations for the adoption of best practices in the new era of Citizen developers.

To achieve faster enablement of digital business capabilities, CIOs of MSEs should:

- **Enable** "Citizen IT" by defining the opportunities and establishing the boundaries separating citizen IT activities into "permitted" and "prohibited" areas.

- **Identify** Citizen IT candidates among the business community based on interest and requisite technical skills.

- **Maximize** the effectiveness of Citizen IT initiatives by providing production-grade operational support to citizen IT resources and outputs.

- **Analyze** artifacts before production deployment by conducting joint reviews, as part of a change control process focusing on security issues, performance risk or intentional fraud.

Source: Boost Development Team Capacity at MSE's Using Citizen Developers and Integrators, Gartner, 29 January 2019

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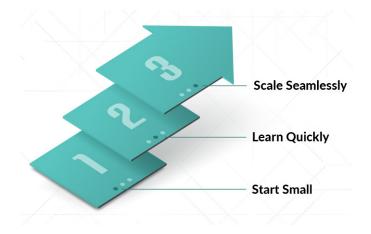
ABOUT SOFTOMOTIVE

Softomotive is the longest standing RPA vendor to offer both a desktop version WinAutomation, as well as server-based unattended and attended automation solutions ProcessRobot. Both of which are quick to deploy and are priced to scale.

These two leading RPA solutions working together are uniquely qualified to support a People1st Approach to RPA because the desktop version is easily installed on everyone's computer to accelerate innovation in process automation from the bottom up. Once the best automations have been filtered, tested and prepared by the COE, they can be scaled as business as usual using the enterprise RPA platform. The transition from one to the other is made easy since both solutions share the same RPA engine.

Scale Seamlessly

Learn Quickly

Start Small

Softomotive recognises that when it comes to automation one size does not fit all. We are the only provider of process automation technology to offer a portfolio of solutions designed to meet the diverse needs of individuals, small teams, growth companies, and large enterprises.

Softomotive provides the smoothest RPA journey by allowing enterprises to start small, learn quickly and scale seamlessly. This helps to reduce overall project risk and avoids high up-front costs which can make achieving a positive ROI that much harder.

For more information about People1st Approach visit: **www.softomotive.com/People-1st-Approach**

For any questions regarding this study please don't hesitate to contact us directly at: **marketing@softomotive.com**