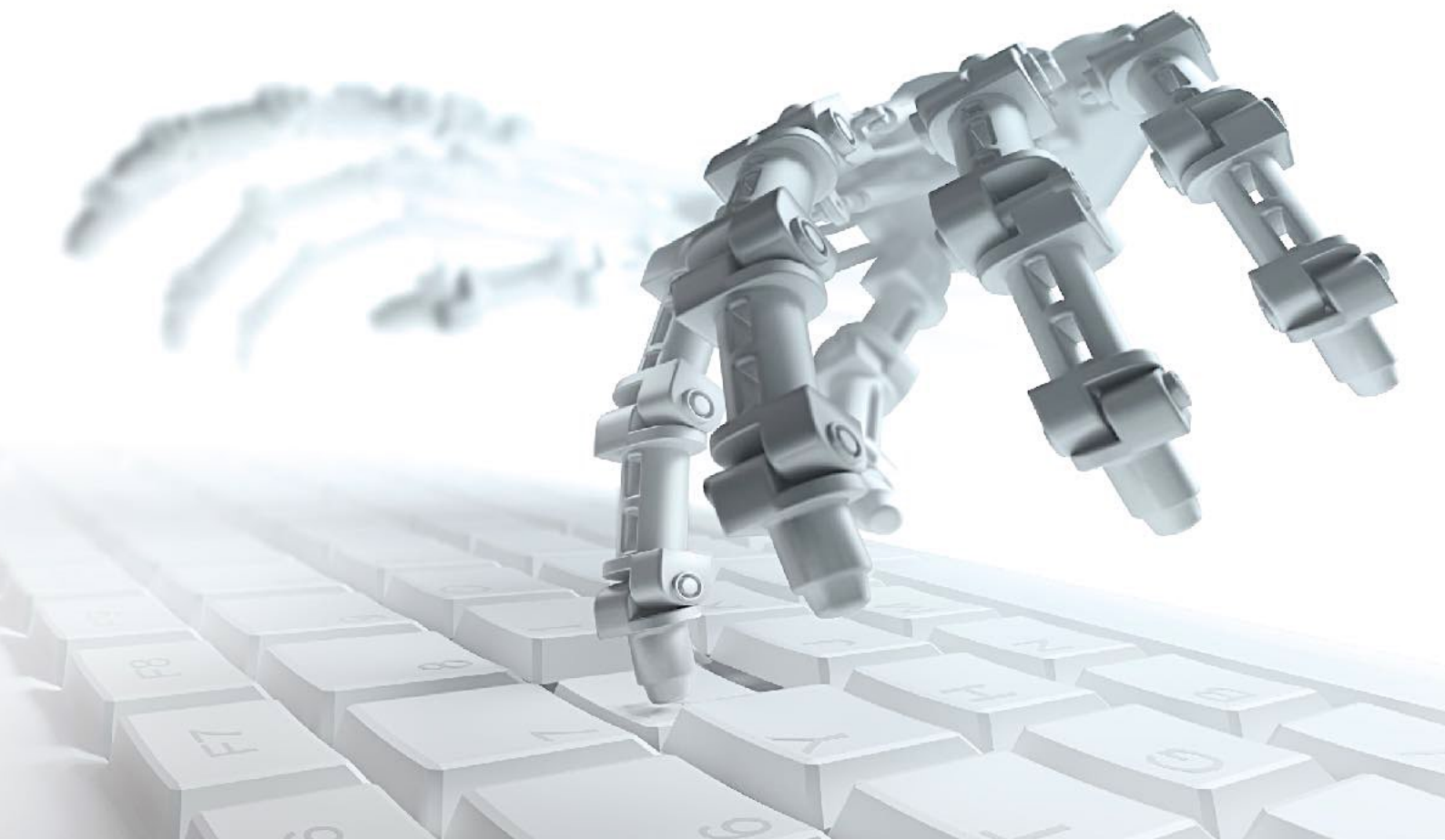




Creating Business Value with Robotic Process Automation

The opportunity with RPA is real. Organizations can leverage RPA to achieve higher efficiency, lower costs, higher

employee engagement and better overall customer experience, if they implement RPA right. However, there are tactical ways to do it and there are strategic ways to implement it. Business value is subject to certain prerequisites and best practices. Take the first steps now. Read this white paper to know how!

How is RPA linked with BPM?

RPA is the last mile task automation of human tasks in Process Automation.

A typical BPM effort involves straight-through process automation of tasks that need to be handed over the the systems or applications. Humans perform the activities where unstructured

decision making is needed or in cases where it is simply not possible to automate the task. this is where dual data-entry, swivel chair scenarios for data transfer and some of the mundane approval operations gained prominence among human tasks. Such tasks take up a sizeable amount of time from knowledge workers that are otherwise supposed to be doing the “unstructured thinking” and “exception handling”. RPA attempts to resolve “just that” problem.

RPA frees up the bandwidth of knowledge workers and allows for more efficient way of performing those repetitive mundane tasks. A lot of traditionally offshore transcription and operational activities fall in such buckets of tasks.

What RPA is?

- Software
- Rule Set
- Program
- Algorithm
- Workflow

What RPA is NOT?

- Physical Robot
- Messenger Bot
- UI Simulation
- Robotic Arm
- Screen Scraping



Let's take a typical business process. There are four types of tasks or operations that are performed by various participants of the process.

1. **System Tasks.** Tasks that are handed off to a system or application by through an API or a web service integration. Typically, a workflow is configured with these tasks as system task in these cases.
2. **Knowledge Worker Tasks.** Tasks that are performed by humans. They are assigned the task, which they perform either directly on the workflow task screen or perform elsewhere and then through any mechanism confirm having performed it.
3. **Mundane Human Tasks.** These are the tasks that are important enough to be performed by certain roles but still repetitive or mundane to make it seem like a waste of human energy. These are the candidates for RPA.

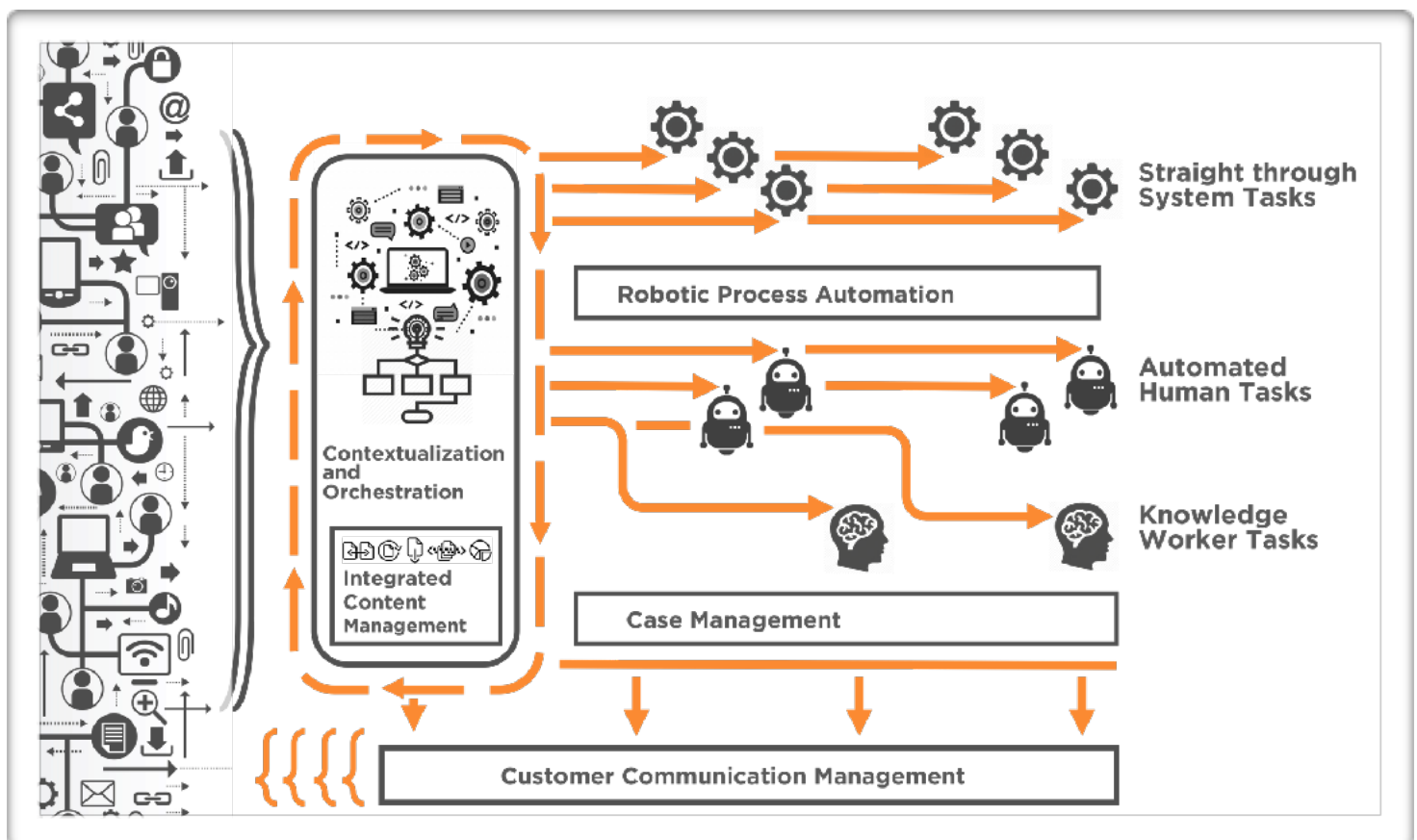


Fig 1: Automated Human Tasks in a BPM scenario handled with RPA

In order to make the most of a business process automation, a combination of RPA and Case Management is needed, thereby achieving efficiency on one hand and knowledge worker effectiveness on the other hand.

Where can you use RPA?



RPA is effective in a particular set of situations. In many others, it's akin to killing a symptom instead of the disease.

There are certain general characteristics of situations (processes, places, functions) where you can leverage RPA to create the promised business value. We talked about certain prerequisites, and those prerequisites in fact also drive some of the patterns that should reflect in an organizational process or set of task before an

RPA based implementation can be considered. Typically, any customer facing (or business value driven) end-to-end process spanning multiple systems and applications with scale is a good candidate.

Process Characteristics

- End-to-end process driven by a definable workflow
- Repeatable, structured, rules based
- Spans multiple applications and systems
- Problematic and prone to frequent data errors
- Carries high volume to justify automation at task levels
- Mature process in the organization with well defined field-set, rules, process model

Task Characteristics (Tasks that typically get automated with RPA)

- Data Entry and Validation (Maker-Checker)
- Swivel Chair Scenario (Copying fields between applications)
- Multi-form Preset Template Message creation (such as emails, texts, social posts)
- Standard Calculations based on third party data, such as exchange rate, stock rates
- Reading/Processing of Images and Documents (KYC, Applications processing, financial documents, lease, legal)
- Data Reconciliation, Data manipulations
- Web scraping and Text Mining

RPA in Accounts Payable

Using a combination of BPM and RPA technologies, Newgen is able to achieve higher efficiency in invoice processing for numerous client organizations.

Automated Paper Invoice Processing

STP for the Soft Invoices submitted via Portal

- Auto Validations using ERP integrations

PO, ERP and Invoice Data checked for 3 way match and paid

Prepackaged robots for:

- Extraction of key fields and logo detection
- Routing and uploading
- Fetching the invoice in the queue
- Automatically uploading the extracted invoice details to workflow

Outcome

80% STP

**20% Exception
Management and
Human
Intervention**

Appendix - Creating Value from RPA

RPA can deliver value, but not in isolation. You need to leverage RPA strategically along with BPM.

RPA holds tremendous promise, however, organizations have to look at RPA as a “part of the solution” and not the end in itself. An effective RPA implementation works in conjunction with a robust BPM platform that supports structured as well as unstructured processes (read, Case Management), and also

allows for additional leverage areas, such as mobility, social integration, content management, image processing and document processing.

Prerequisites for an Effective RPA implementation

RPA, in essence, is a process exercise. It may look like an extension of an underlying ERP in some cases. Pasting an RPA implementation on top of an ERP that has its own legacy and hardwiring issues would not yield the intended benefits. It's important to understand what capabilities are a prerequisites for an effective RPA implementation.

BPM Platform. Without an effective BPM platform, an RPA implementation would be like town exits without an interstate freeway. Process orchestration at the business unit level is what drives the overall business value, while RPA implementation at the tasks level, supported by the orchestration and modeling platform, gives the incremental leverage that it promises.

Case Management. Considering that RPA is primarily targeted to free up the knowledge workers resources to allow them to focus on the real knowledge work, it is critical to have a process solution that allows such work to happen in a well defined manner. BPM platform needs to have Case Management functionality to allow for the execution of unstructured tasks and processes in conjunction with automated and structured parts of the processes.

Document Management and Document Processing. Most of the prominent candidate processes of RPA happen to be documents intensive. In order for the robots to be able to focus on the core functionality of getting through the tasks, you need to have a document management capability in place

for basic functionality of documents retrieval, the document type identification, auto field capture and so on.

Imaging. Most processes today involve images, and the trend is increasing by the day. An imagine solution natively capable of performing basic enhancements, processing and field capture is again very important.

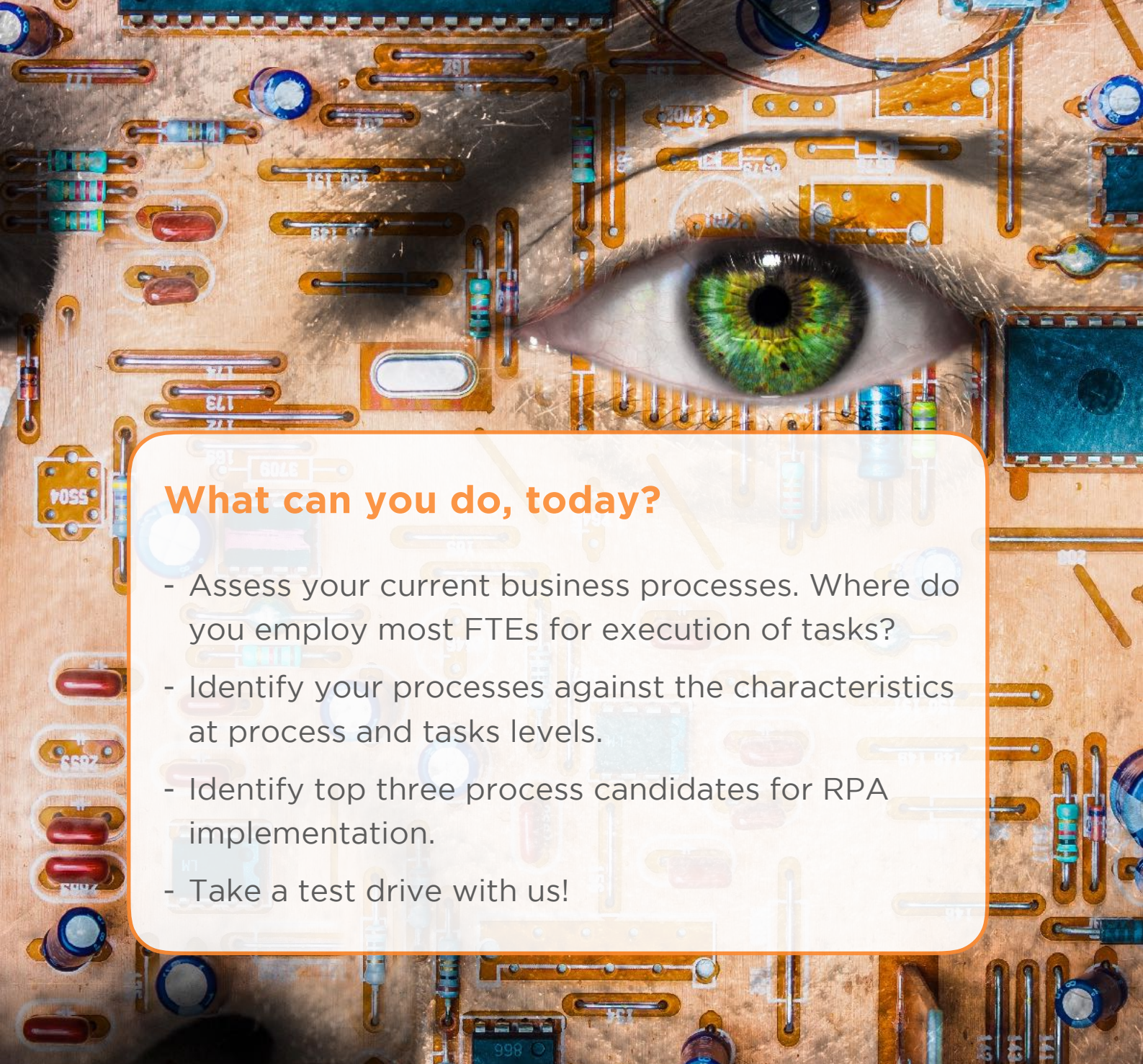
Straight-through Integration. This goes without saying. However, it is the most critical aspect of RPA, without which any implementation would be a replica of human swivel chair scenario. the process platform should have the capability to integrate with various systems as well as to allow for smooth passage of data from systems to robots and vice-versa and to process platform, in oder for the process to work seamlessly.

Business Rules Management System. A good process platform needs a robust BRMS. However, it is important to call it out as a critical function without which an RPA implementation would be half-backed, and robots would be expected to do a lot of business rules execution without having the centralized BRMS capability with them. BRMS also takes a lot of automation scenarios out of the way from human tasks, which allows for an RPA implementation to focus on what's actually a truly human task that needs to be further automated.

Two more areas that may not be prerequisite, but improve the effectiveness of customer-facing processes tremendously with RPA.

Integrated Customer Communication. Most routine customer communications (such as, account statements, promotional offers) are candidates for intelligent automation with personalization. With such a system in place, while implementing RPA, the effectiveness of end end-to-end process increases multifold. A workflow orchestrated communication at high volumes sometimes required interventions of humans that are not strictly knowledge work, that's the sweet-spot of RPA and CCM that can provide great value.

Social channel Integration and Digital Sensing. Context is critical in any process. With technologies such as digital sensing at disposal, the automation of customer engagement process with the right context becomes possible. Many intervention points in these customer facing processes can be made more effective with RPA.



What can you do, today?

- Assess your current business processes. Where do you employ most FTEs for execution of tasks?
- Identify your processes against the characteristics at process and tasks levels.
- Identify top three process candidates for RPA implementation.
- Take a test drive with us!

About Newgen

Newgen is the leading provider of a unified digital transformation platform with native process automation, content services, and communication management capabilities. Globally, successful enterprises rely on Newgen's industry-recognized low code application platform to develop and deploy complex, content-driven, and customer-engaging business applications on the cloud. From onboarding to service requests, lending to underwriting, and for many more use cases across industries. Newgen unlocks simple with speed and agility.

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