



# **Getting RPA Right:** **Seamless** **Customer Journey** **With BPM and RPA**

A Newgen guidebook for CxOs



# Where are you in your automation journey?

The urgency to automate can hardly be overstated.

Your customers demand great experience.

Your employees expect you to empower them to perform better.

Your partners want to collaborate better to serve your mutual customers.

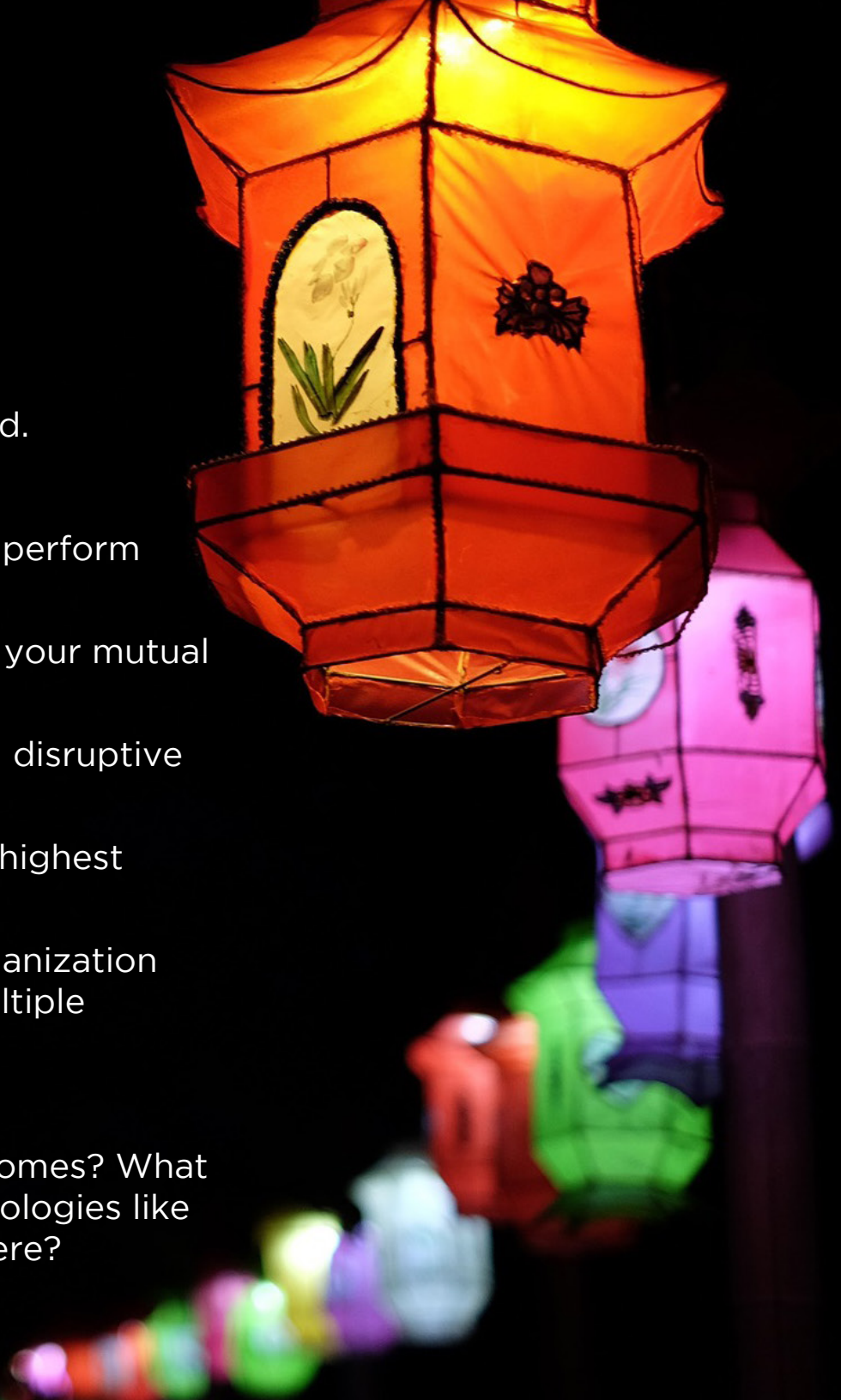
The lines between the traditional competitors and disruptive players are blurring fast.

You have no choice but to keep improving at the highest speed possible!

Automation helps. And, chances are that your organization not only acknowledges this but also has taken multiple initiatives in that direction.

The questions to ask are:

How far out are you in achieving the desired outcomes? What should you expect? How do you implement technologies like robotic process automation (RPA) right to get there?





# Getting RPA right

## Assess where and how to use RPA

By 2022, **80%** of RPA-centric automation implementations will derive their value from complementary technologies.<sup>1</sup>

- Gartner research

Every technology comes with its own strengths and limitations.

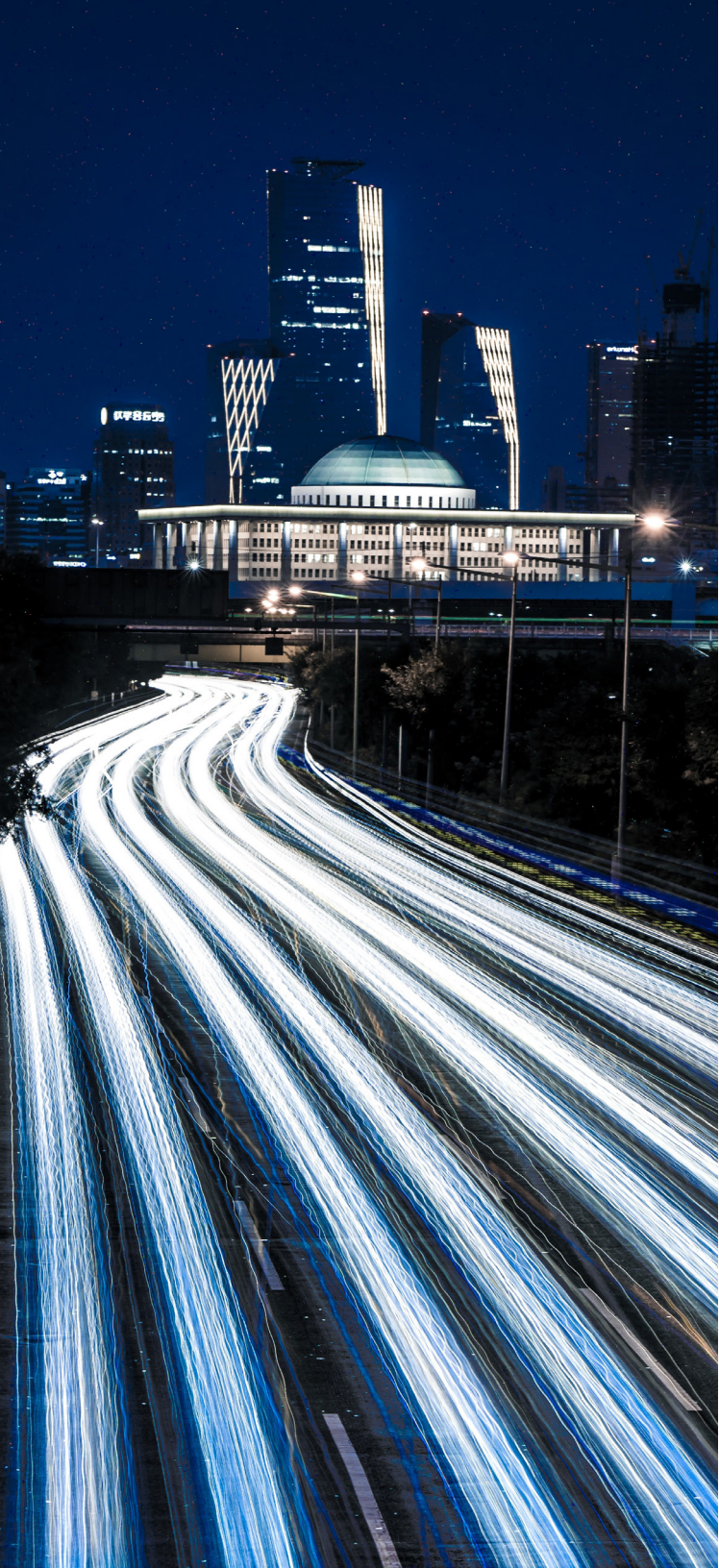
RPA, if implemented well, can yield tremendous tactical and specific outcomes in its scope.

However, as Forrester Research indicated through a recent guidance report, you need to “Identify and quantify the opportunities to use RPA for revenue-generating activities in addition to cost-saving or compliance activities.”<sup>2</sup>

The report also further states that since one tool is unlikely to solve every unautomated activity in your organization, you need to carefully set expectations of what the tools can do and how your organization can use them to support digital transformation as part of an automation strategy.

You must start by establishing the right goals.





# Establish the **right goals** It comes down to customer journey

Your automation efforts culminate only when customer journey is holistically transformed.

How do your automation initiatives impact the overall customer journey?

Does it result in a better overall experience for your customers (internal as well as external)? Is the impact significant, or is it marginal?

Also, is the intended cost efficiency real or notional? Are the freed up employees still engaged in other mundane activities, nullifying the expected cost efficiency?

What do we mean by that?

Let's say, you have automated the customer onboarding process to make it faster and more cost-efficient.

Now, by automation, if you mean that you have automated certain tasks through RPA to speed them up (and free up human resources), does that make any significant difference to the overall experience for your customers?

For instance, if systems are rigid and processes are disjointed, adding bots at the tasks level will not yield the intended benefits at customer journey level. Look at the overall customer journey, and tie in the pieces through automation.

**While you can improve parts of the customer journey through RPA, ask yourself whether these improvements add up (or, even better, multiply) to transform the experience for your customers. What can you do to achieve a seamless customer journey?**



# Leverage BPM with RPA to accomplish a seamless customer journey



Customer journey is a sum-total of all interactions and experiences that your customers have with your organization across touchpoints. Considering this, you need a process backbone to carry them through, while automating various tasks involved in the process through variety of automation mechanisms available to you through RPA.

We offer **five guidelines** for you to use RPA in the right manner to address your broader automation goals, including customer journey.

**In customer journey, consider business process management (BPM) as the highway, and RPA as the last-mile process automation.**





# 1. Do not lose sight of the woods for the trees

Broadly, RPA is applicable to activities that are fairly structured, mostly repetitive, and typically high volume and transactional. These use cases are generally easy to identify.

However, this generalization (or over-simplification) is where the pitfalls of RPA implementations lie. Things that shouldn't be automated get automated without considerable outcome in hindsight. Or, in the quest of speedy implementation, the long term considerations are compromised.

**Focus on end-to-end processes, not tasks.**

## Key Guidelines

- Not all processes are made equal. Some processes are more critical than others. At the same time, some seemingly small tasks may have a larger impact. Identify RPA candidates carefully.
- If the process is disjointed, efficiency improvement in contained tasks does not yield the intended benefits. Attend to the broader process.
- Automate processes through BPM, and apply process analytics to identify and isolate process level efficiency issues from task automation candidates.

## Pro Tip!

A process platform approach enables consistent user experience across products and business units. You can accomplish this by smartly deploying a business process automation platform while automating tasks through RPA.





## 2. Improve transactions, but also prioritize engagement

The hype of RPA can sometimes confuse priorities and you may end up solving for transactional efficiency without any significant impact on customer engagement. Nothing wrong with efficiency, of course. However, customer engagement should be a priority.

Focusing on key processes and channels, and identifying the key interactions can go a long way in setting you up for incremental innovations across channels, in tow with transactional efficiency improvements.

**Focus on automation for engagement.**

### Key Guidelines

- Consider customer-facing process scenarios, such as documents or media item submission in grievance filing or onboarding. Automated processing and intelligent response, in this case, is a good example of improving engagement with efficiency.
- When backend tasks are automated with RPA, often the hand-off still continues to be mediated by front-office personnel, nullifying the efficiency improvement at the customer level. Tie-in the process through straight-through process automation with BPM to deliver a seamless customer journey.

### Pro Tip!

A multi-experience platform that ties in mobile and social capabilities with an underlying business automation platform, which in turn also, ties-in RPA can deliver a consistent customer experience across touchpoints.





### 3. When exceptions are the norm, treat them as such

RPA, by the nature of its automation mechanism, is applicable to structured and templated tasks.

A lot of backend tasks are high-volume and structured. However, the situation is changing with more diverse and heterogeneous customer scenarios. Today's demanding customers balk at rigid processes. In traditionally structured processes also, we are faced with increasingly more exceptional scenarios that need addressed.

#### Design for flexibility and adaptability.

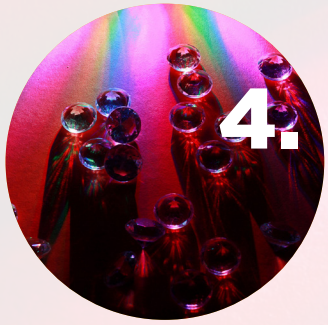
##### Key Guidelines

- You need the flexibility to handle exceptions at two levels. At the process level, the routing and decision points need more intelligence, so that a variety of situations can be handled without compromise. At the content level, a variety of unstructured inputs needs to be processed. A combination of BPM, enterprise content management (ECM), and RPA can help you accomplish this.
- As little as we like it, bots have their own share of failures - technical or functional. You need the ability to recover from such failures with a governing process layer that can handle hand-offs and decisions in these kinds of exceptions.

##### Pro Tip!

A process backed by a platform allows for the much needed dynamicity and adaptability in your operations, without compromising on speed. Use the process layer through flexible routing over and above RPA-managed tasks.





## 4. Automate process, content, and communication for CX

Desktop automation is paving way for cognitive automation, where bots take intelligent decisions, powered by artificial intelligence (AI), machine learning (ML) and natural language processing (NLP). By leveraging content analytics - extracting information from images, processing unstructured content to detect sentiment - RPA can help shape behaviors.

Teamed with BPM, ECM and customer communication management (CCM), RPA can help you predict behaviors and drive experience across touchpoints in customer journey.

**Automate for holistic customer experience.**

### Key Guidelines

- Holistic customer experience is about end-to-end customer journey across the touch points. An important element in the journey is the seamless carriage of context through the process in the form of content (media, data, or documents). The ability to extract intelligent information from content goes a long way in automating decisions in context.
- Responsive personal communication is critical. An integration of content, processes, and communication, further enhanced by automation through RPA can be used to drive responsiveness with real-time speed.

### Pro Tip!

Context is key. You can integrate content into your process to carry the much needed context. Leverage RPA along with BPM, ECM and CCM to drive automated actions based on context and analytics.





## 5. Automate to free up knowledge workers. Empower them.

Your knowledge workers and customer-facing personnel are key to customer-centric operations. They are also a critical cog in your innovation engine. They are often bursting with ideas on how your organization can improve.

While RPA can automate mundane routine tasks to free up their bandwidth, there are tasks that need human decisions, and it's critical to enable them to make intelligent and informed decisions, and equip them with the requisite controls.

### Empower knowledge workers.

#### Key Guidelines

- First step is to automate all mundane and repetitive tasks, thus freeing up your knowledge workers' time. Next, you need to identify ways to intelligently automate tasks to enable smart decision making by making the requisite context available to them through BPM and ECM.
- Low code application development platform also empowers your tech-savvy knowledge workers to create their own processes with lesser IT dependency and still with enough control and IT guardrails. Small incremental improvements go a long way in your automation journey.

#### Pro Tip!

When used in conjunction with BPM, RPA can automate tasks that are traditionally performed by knowledge workers, freeing them to focus on customers. BPM and ECM can help with control and context to enable smart decisions.



# Seamless customer journey with BPM and RPA

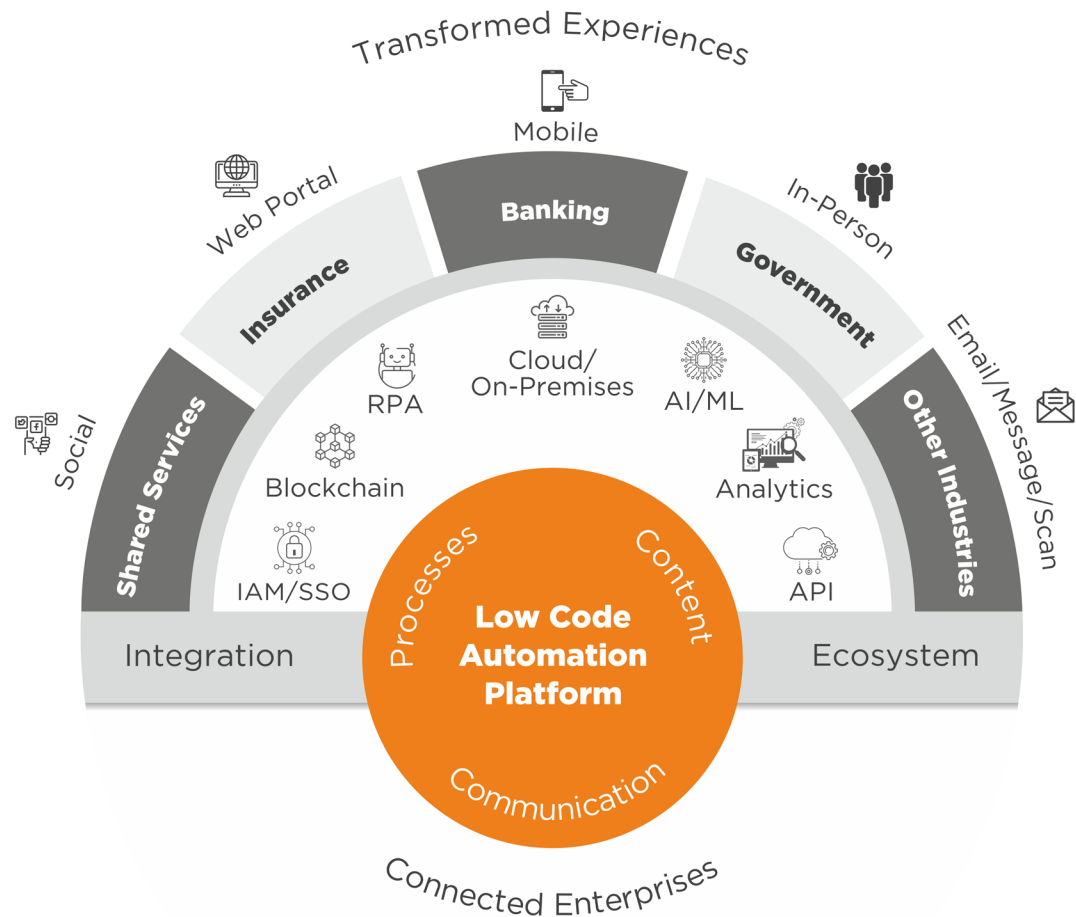
## Newgen Can Help!

A seamless customer journey requires you to bridge various silos in your organization.

Newgen offers a low code platform that integrates various capabilities needed to build business applications across the spectrum, through our flagship products in intelligent digital automation (BPM), contextual content services (ECM), and omnichannel customer engagement (CCM).

On one hand, our platform helps you transform experiences by bridging (process, content, and communication) silos in your organization.

On the other hand, our micro-services architecture helps you with flexibility and scalability. It helps your organization become more agile for sustainable and continuous improvement, thereby future-proofing your enterprise.



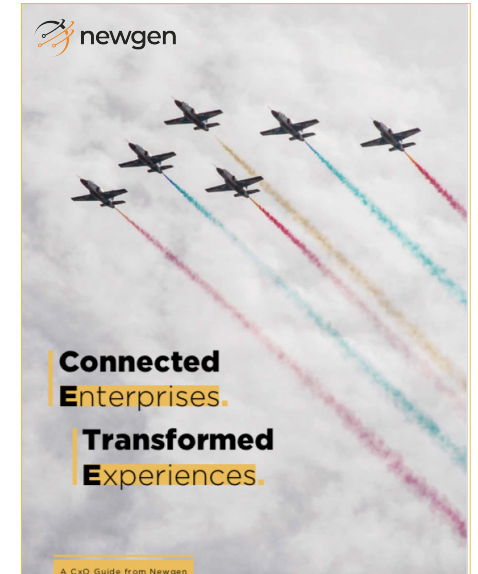
What's more, our philosophy of innovation enables you to leverage cutting edge capabilities to keep you ahead of the curve. Such capabilities include mobility, digital sensing, analytics, cloud, artificial intelligence, machine learning, robotic process automation, and blockchain.



## References

- 1 Predicts 2020: RPA Renaissance Driven by Morphing Offerings and Zeal for Operational Excellence, Gartner Research, Dec 2019
- 2 Robotic Process Automation: Eight Guidelines for Effective Results, Forrester Research

You may also like to read:



## 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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