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RPA: Delivering Speed to Value in Challenging Times

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Presented by:

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Housekeeping

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What's next?

Wrap up with the Closing Keynote featuring John O'Leary this afternoon, *3:15 p.m. CST*

CPE certificates

NEW this year – download CPE at the conclusion of each session.

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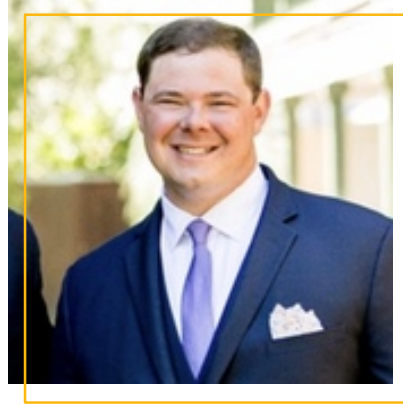
Need something?

Email hc.summit@crowe.com – we're here to help!

Your Presenters

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Polling Question

What is the primary goal you'd like to achieve with automation?

- **A** Cost savings
- **B** Eliminated mundane work
- **C** Improved compliance
- **D** Improved security
- **E** Standardization
- **F** Other

Agenda

- What is RPA & how can it transform your business
- Case studies & real-life examples
- 5 building blocks for a successful foundation

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Intelligent Automation Glossary

A **chatbot** is a computer program that's designed to simulate human conversation. Chatbots interpret the words given to them by a person and provide a pre-set answer.

Robotic Desktop Automation is a form or RPA scaled down for a single user. It helps people solve the problem of tedious, manual tasks within their day-to-day activities.

Robotic Process Automation is the technology that enables computer software configuration (i.e.robot) to emulate and integrate the actions of a human interacting within digital systems to execute a business process.

Chatbots

RDA

RPA

ML

AI

IA

Machine Learning provides systems the ability to automatically learn and improve from experience without being explicitly programmed

Artificial intelligence refers to the simulation of human intelligence in machines that are programmed to think like humans and mimic their actions.

Intelligent Automation strategically layers the afore mentioned to empower rapid end-to-end business process automation and accelerate digital transformation.

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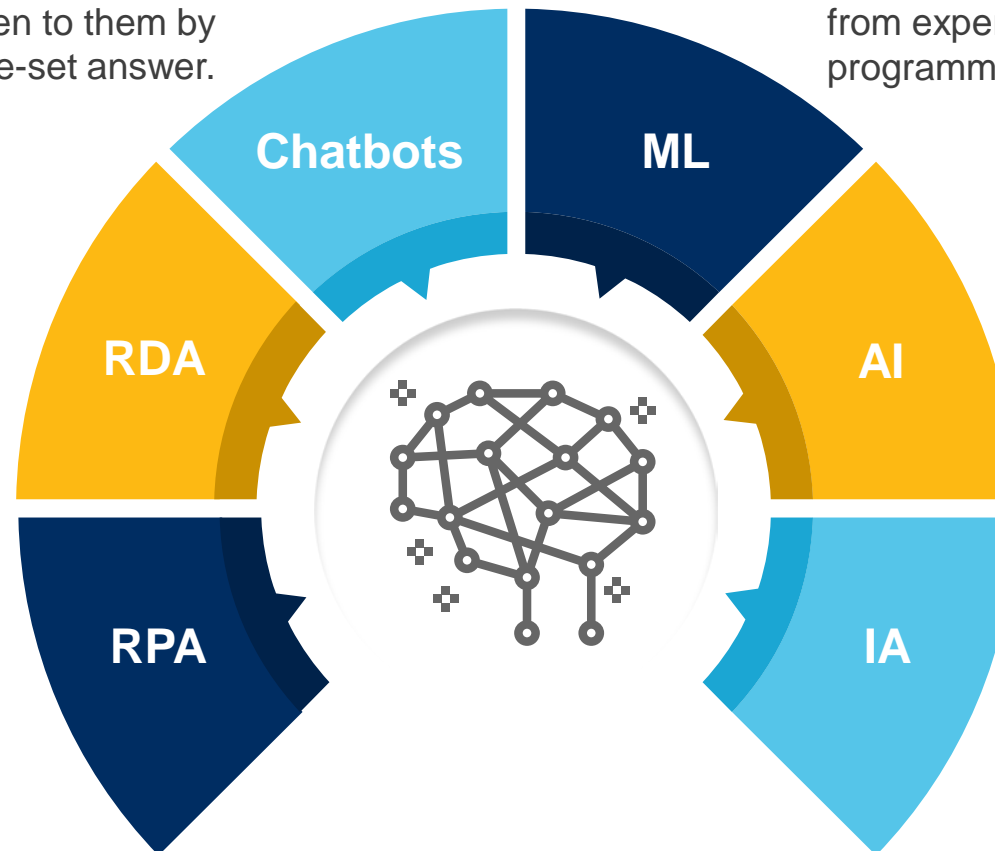
The Automation Spectrum

MANUAL
Judgment based
Customer focused
Problem solving
Unstructured
Value adding

ASSISTED
Repetitive
Semi structured
Customer facing
Manually triggered

UNASSISTED
Repetitive
Rules driven
Structured
Schedule/event driven

AI
Pattern matching
Unstructured
Repetitive

Automation Opportunities within Finance

Accounting

Net Revenue & Reimbursement

Accounts Payable

Decision Support

Payroll

Budgeting & Planning

Treasury

Capital Management

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CROWE HEALTHCARE SUMMIT / THE POWER OF COMMUNITY

Polling Question

What type of automation is your organization using?

A	B	C	D
RPA	RDA	Chatbots	ML

E	F	G	H
AI	IA	A combination of A-D	None, yet

Success stories

Unassisted Automation Implementation
Finance & Revenue Cycle Management | US-based; remote deployment

CHALLENGE:

Reduce processing time and resources required and improve the quality of output, while complying with existing business rules.

SOLUTION:

Redesigned the retroactive pay process to ensure greater efficiency and reliable data; including automated workflows, exception management & employee notification.

RESULTS:

- 100% compliance with existing rules and policies
- Significant savings & cost avoidance by amending large overpayments
- 82% reduction in FTEs
- Increased accuracy in payment processing

SYSTEMS INTEGRATED:

blueprism

Epic

Office

LAWSON

Unassisted Automation Implementation
Revenue Cycle Management | US-based; remote deployment

CHALLENGE:

Securely extract bank statement data from multiple bank websites in a secure manner to free up clerks' time for more meaningful work.

SOLUTION:

End-to-end automation navigates the relevant web pages, logging-in and downloading select statements for storage and reformatting.

RESULTS:

- 19 hours saved / month
- Significant reduction in waiting time for downstream processes
- Increased data security through automated credential management
- Standardization of bank reporting process

SYSTEMS INTEGRATED:

Unassisted Automation Implementation

Human Resources | US-based; remote deployment

CHALLENGE:

Restructure legacy processes for determining eligibility of paid leave for employees on long-term leave and automating payroll processes.

SOLUTION:

Augmented and integrated their existing pay integration system with automated workflows adding more handling capacity and determining paid leave eligibility automatically through employee accruals.

RESULTS:

- 80% reduction in call center volume
- 260% increase in case resolution speed
- 64% automated = 80,000+ hours back to client
- Significant savings by fixing large overpayments

SYSTEMS INTEGRATED:

blueprism

Office
W X O P

PeopleSoft

Polling Question

Which answer option is not a characteristic of unassisted automation?

A
Repetitive

B
Rules driven

C
Pattern driven

D
Structured

5 building blocks for a successful foundation

Involve a team of senior stakeholders

Agree upon & set strategy for outcomes to create reciprocal interest and support

Meet regularly to align expectations and resources

Share results often to maintain momentum and focus

Manage change effectively

Set expectations early by creating a transparent environment

Engage employees regularly to explain benefits & garner input

Provide training and education along the way

Deliver initial value ... rapidly

Identify the low-hanging fruit

Use quick-wins that return high-value as a fundraiser

Enable bigger, more transformative automation projects

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Transform rather than transition

Question the convention

Diagnose the process

Redesign the solution

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Treat your investment as a program

Focusing on individual processes and tasks can marginalize automation and create random acts of automation

Treat your investment in automation as a program – a continuous journey that evolves and expands.

Do something,
do something **better**,
do something **more**.

Polling Question

What's the first step to creating a successful program?

CROWE HEALTHCARE SUMMIT / THE POWER OF COMMUNITY

A

Engage employees regularly to explain benefits & garner input

B

Agree upon & set strategy for outcomes to create reciprocal interest and support

C

Use quick-wins that return high-value as a fundraiser

D

Question the convention
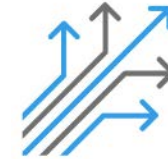
Know when to seek guidance

Know when to seek guidance

JUST GETTING STARTED

STALLED OR STUCK

LOOKING TO EXPAND OR ACCELERATE

The #RightPartner helps you

THINK STRATEGICALLY
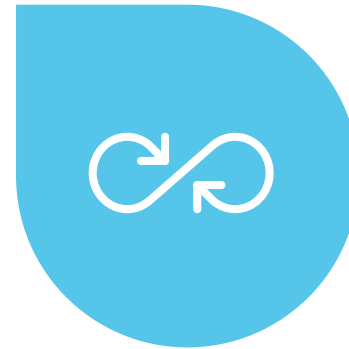Align stakeholders and breakdown organizational silos to clearly define goals.

INSTITUTIONALIZE QUICKLY
Apply IA standards enterprise-wide to achieve scale.

START FUNDAMENTALLY
Create a roadmap and governance model to empower your RPA program.

INNOVATE CONTINUOUSLY
Stay highly engaged to maintain an optimal program.

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SHAPING THE FUTURE OF WORK

Symphony enables clients to rapidly realize the potential of the future of work with greater certainty of outcome.

CONSULTING | IMPLEMENTATION | MANAGED SERVICES

Unparalleled experience delivering results at scale

Client intimate, value oriented and agile

Laser focus on IA-driven Digital Transformation

Uniquely positioned to re-imagine and deliver outcomes across the entire organization

Creative, Innovative and future oriented.

STRATEGIC PARTNERSHIPS & CAPABILITIES

ABBYY · AUTOMATION ANYWHERE · blueprism · enate
Jacada · NICE · PEGA · UiPath

INDUSTRY RECOGNITION & AWARDS

HfS — #1 Delivery of Value
gsa — Digital Champion of the Year
UiPath — Regional Partner Innovator
blueprism — Implementation & Best Practice Leader

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The best time to automate operations was three years ago… the second-best time is now.

THANK YOU

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