

Prioritizing Your Organization's Processes for Automation

If your organization is implementing a robotic process automation solution, you've probably identified a long list of current tasks and processes as candidates for automation. Moreover, as your solution produces tangible benefits, such as increased productivity, employee capacity, and quality (decreased rework), requests for additional automation will probably grow very quickly. So where should you start — and how will you manage demand in the future? Let's take a closer look.

Prioritize Your Processes

Start by establishing a small group of decision makers, along with a framework for reviewing the ongoing list of items for automation. You'll need a consistent set of criteria for evaluating and prioritizing future automation requests. We recommend you create an "automation prioritization scorecard" that includes the following categories:

- Percentage of process based on rules
- Operational impact
- Application stability
- Scope
- Scalability
- Organizational factors

Next, you'll need to assess each process for its automation value. The questions below can help drive your decision making.

Is the process rules-based, or does it require human judgment?

Are there predefined business rules that determine how specific steps and decision points within the process should be completed, or what should happen next within a given sequence? Or is human judgment (and involvement of an employee) required to determine what should be done and how? Is the process always completed consistently?

As a starting point, we suggest a benchmark of at least 70 percent rule-based (i.e., requiring 30 percent or less human judgment).

What is the operational impact?

To what extent would automating this task or process improve your operations? What is the volume? How many of these processes are completed each month? Is the process labor intensive or easy? How much efficiency would be gained by automating the process or portions of the process? Efficiency gains of 10-15 percent from automation can result in significant productivity improvements when applied to a large volume, whereas automating a process that is very difficult or complex, but is only performed once each month, has less operational impact.

Recommendations

- *Identify a small group of decision makers to govern your automation efforts.*
- *Create an automation value scorecard to assess and prioritize suggested use cases.*
- *Share results of current automations with others in your organization.*
- *Socialize the list of requested (future) automations to help secure funding to grow your human and robot resources.*



Executive Perspective

How often are applications in the process “touched?”

Does the proposed use case involve automating steps on applications that are frequently patched, upgraded, or dynamically changed? Is the application brought offline during regular maintenance windows for your IT organization to make updates? Is this downtime typically when you might want to have the robots processing work items so that they are ready for employees to complete the next step when they arrive on the next business day?

From this perspective, processes using these applications may still benefit from automation, but your organization might see greater benefit in automating a process that uses a very stable application, but ranks similarly across the other criteria.

Is the process used by one group, or does it extend across the enterprise?

Is the process limited to a single function? What processes are performed by multiple groups or departments using the same standard enterprise applications? Can a single automation deliver benefits across multiple business units, regions, and functions? Automating a process used by multiple groups has the potential to provide benefits across those areas, with greater positive impact.

Is the process repeatable and scalable?

Can your team create an automation script for a specific process to be reused in part or in whole for similar processes by making minor changes or using a variable? By creating your automation scripts so that they can be linked together or copied with minor changes to address other needs, your automation content development efforts will go much further, and you'll also need to perform less maintenance.

Are there other factors that should be considered in the ranking?

Each organization will likely have additional criteria that should be incorporated when prioritizing which processes are automated. Can you support new corporate initiatives by using automation? Are there additional expenses that would be incurred by using a robot rather than a human to complete a process? Consider both positive and negative variables to help ensure your relative prioritization rankings are aligned with executive strategy and operational benefits.

Create a Consistent Process and Governing Body to Manage Automations

Design a scorecard that calculates a “total value score” for each proposed automation use case, factoring in how your management team weighs the relative importance of each criterion. Use it consistently to evaluate each proposed process, and add processes to the queue for future automation based on how they measure up against previously requested processes. Review your scorecard criteria periodically and make changes as needed to ensure it continues to be part of your automation management framework. Share results of current automations and the list of requested automations with others in your organization to help secure approval and funding for expanding your human and robot resources.

Verint Robotic Process Automation

Many organizations have operational areas that need to execute thousands of time-consuming business processes each day that, while moderately complex, are fundamentally rules-based and don't require human decision making and judgment. Verint® Robotic Process Automation™ can manage these tasks for you. This solution comprises software robots that can completely replace the need for manual processing of specific tasks or entire multistep processes within a functional area, automating them and operating around the clock.

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