

Seven Steps to Making Your RPA Investment Work

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Reducing manual effort via robotic process automation can boost efficiency and reduce costs.

Effective automation relies on good business process design, with multiple factors to consider, including systems use, business impact, data touch points, ROI of labor and investment. And the ROI -- from the front office and the back office -- is significant. In fact, automation can lead to cost reduction of 30% or more with a typical implementation time of three months, according to NelsonHall, a healthcare industry outsourcing analyst firm.

Robotic process automation reduces the manual effort required for each activity or even totally eliminates the manual effort required for some tasks. Significant capacity optimization can be achieved by connecting and building business rules on multiple applications. This saves the valuable agent effort of toggling between systems, enabling them to handle more and more complex transactions.

Robotic automation, a non-invasive technology, doesn't require back-office integration through APIs and seamlessly works with end-user interfaces and enterprise applications. The technologically agnostic solutions work well with data-intensive processes, across multiple domains and industry verticals. They offer various functionalities, including responding to external stimuli and deciding when to execute functions; acting autonomously to use and orchestrate any application; bringing inherent data protections, transactional integrity across systems; and providing clear audit trails and other system management functions.

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Implementation Considerations

[1] **Identify opportunities to automate.** It is essential to determine process adaptability to automation. Each unique process is more open/viable to automation or not based on various factors, such as process size, industry, current process and SLAs.

[2] **Validate the opportunity.** Check how adaptable the process is to being automated. If we look at most processes, we notice that they typically comprise both transaction and decisioning parts. Automation can be designed to achieve some quick wins on the transactional part, which is the more time-consuming repetitive task.

[3] **Select a design model.** Select the best model for your requirement. You may need to redesign the process to maximize the scope for automation. In some cases, this yields additional benefits. Design the automation plan that suits the business structure. Customize the automation model to suit the process needs.

[4] **Develop the automation plan.** It is important to deep dive into the process and identify all exception scenarios. In some processes, it is best to automate the time-consuming part of the process and then build additional incremental automation.

[5] **Deploy the pilot phase.** When you develop an automation plan and are ready to implement it, run a pilot project first. This allows you to observe the effectiveness and overall performance of your automation plan with an actual process in real time. Take the results of the pilot project and make improvements accordingly. Look at the results of the pilot and then include those scenarios that need to be automated and those that can remain an exception. It is good to involve the right stakeholders to understand the long-term plan and then plan the next steps. That has been a key takeaway: collaboration and involvement of client and relevant stakeholders. Sometimes there is a difference in testing and live environment, and there could be training for roll-out.

[6] **Roll-out.** Besides development of automation, a plan needs to be built for training and handling contingency, depending on the criticality of the process. It is good to ensure that, while people are trained on the revised process, there are also documents on the process before automation to handle any contingency due to change in applications, systems. Ask yourself: What is the level to which we can drive change in my process/organization? Ascertain the number of people you need to retain in the process following automation implementation. Can current volumes be addressed with reduced staff numbers?

[7] **Maintain your automation activity.** This is often an overlooked area. Automation is not always a one-time activity. There will be changes in the process and systems and there should be a good change management process to handle any changes. Estimate the impact of change in systems or processes and have a plan ready for this. At this last phase, prepare change management plan. It is critical to get all stakeholder buy-in. In some systems, even a field included in a drop-down may have an impact on the output, so there should be a plan to manage these.

RPA delivers on many fronts: driving significant cost savings and also optimizing the customer experience. As a high-value enabler, RPA will provide a summary view of the customer with the specific information that is required at the time of the interaction; assist agents on routine tasks, to save processing time; act as a guide for the new learners and reduce the need of training; automate rule-based workflows; minimize error rates, as most of the processes can be automated; and standardize the processes while managing the quality and compliance at a significantly higher speed and lower effort.

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