ICREON

PLAYBOOK

THE PRACTICAL **RPA CHECKLIST** FOR A SUCCESSFUL IMPLEMENTATION

Contents

HOW TO IMPLEMENT RPA SUCCESSFULLY?

Over the past few years, Robotic Process Automation (RPA) has proved itself as a game-changing technology, revolutionizing how companies automate continual tasks and optimize their workflows.

According to a report by Statista, worldwide spending on robotic process automation (RPA) is anticipated to reach 23.9 billion USD by 2030, with a CAGR of 27.7% from 2021 to 2030.

Given these facts, many organizations have already invested in RPA technologies to achieve remarkable levels of productivity, accuracy, and cost savings. While a few are still struggling to harness the core benefits due to poor strategic RPA implementation choices.
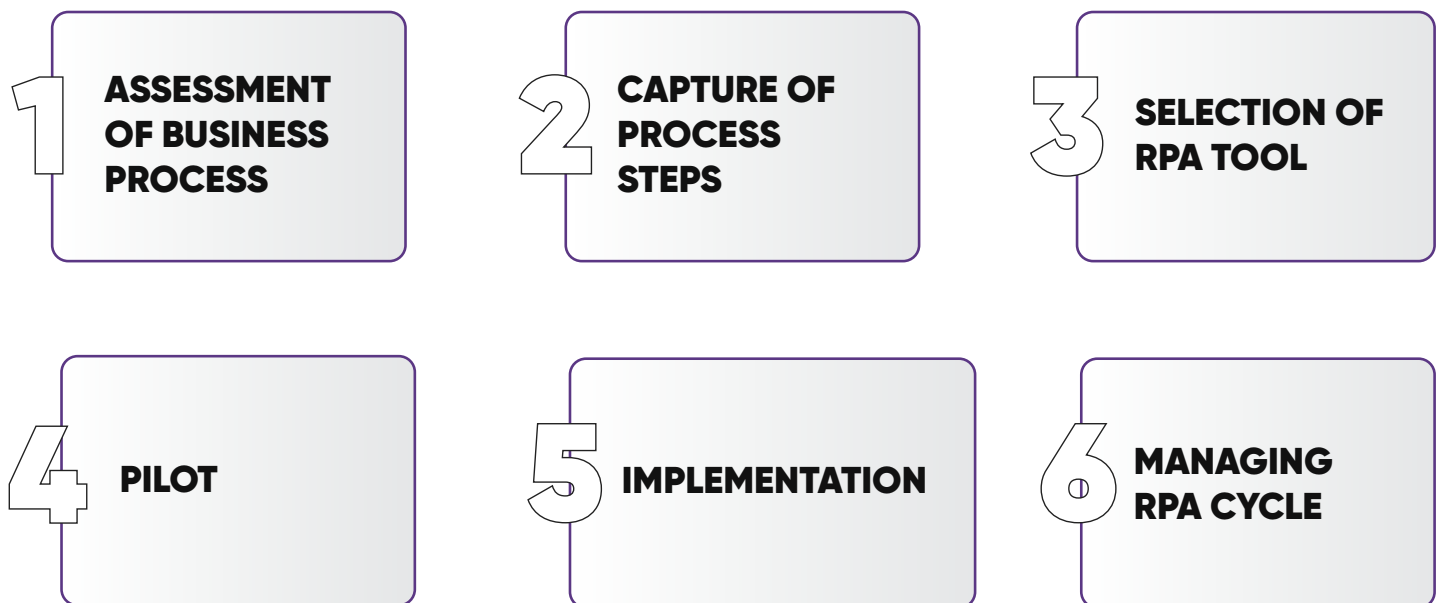
While RPA offers immense benefits, the complexity of the implementation process is a major headache for businesses. Implementing Robotic Process Automation (RPA) within an organization is a multi-faceted endeavor that demands careful planning, strategic execution, and a comprehensive understanding of the existing processes.

This playbook offers you a comprehensive understanding of the RPA implementation process, suitable RPA tools, steps involved in RPA implementation, best practices, RPA cycle management, and some real-time successful RPA implementation examples.

Let's get started!

STAGES OF RPA IMPLEMENTATION PROCESS

The RPA implementation process typically consists of several key steps, each playing a crucial role in ensuring a successful deployment. Here is a graphical representation and a brief overview of the typical RPA implementation stages:

1 ASSESSMENT OF BUSINESS PROCESS

2 CAPTURE OF PROCESS STEPS

3 SELECTION OF RPA TOOL

4 PILOT

5 IMPLEMENTATION

6 MANAGING RPA CYCLE

STAGE 1:
ASSESSMENT OF BUSINESS PROCESS

This initial phase involves assessing the organization's needs and finding out the potential areas requiring automation. Key processes are analyzed to determine their suitability for RPA, considering factors such as volume, complexity, and frequency of tasks. A business case is developed, outlining the expected benefits, ROI, and implementation strategy.

01 IDENTIFY PROCESSES
Evaluate process complexity, rule-based nature, transaction volume, and potential benefits to prioritize automation.

02 EVALUATE FEASIBILITY
Assess feasibility of the identified processes by considering factors such as the complexity, data volume, frequency of execution, and the duration of the process.

03 DEFINE PROJECT SCOPE
While defining the scope of RPA implementation project, try considering the main objectives, timeline, and resources needed.

04 ANALYZE THE PROCESS
Analyze the process in detail to understand the steps involved, the inputs, outputs, and decision points. This analysis allows you to identify any exceptions or edge cases.

05 DETERMINE THE IMPACT OF AUTOMATION
Determine the impact of automation on a process by considering factors such as time savings, cost savings, and improved accuracy.

06 EVALUATE THE POTENTIAL BENEFITS
Evaluate the potential benefits of automating the process, including improved efficiency, reduced errors, and increased productivity.

07 CONSIDER THE RESOURCES REQUIRED
Consider the resources required to implement the RPA solution, including hardware, software, and personnel.

CAPTURE OF PROCESS STEPS

Capturing process steps involves documenting the sequence of tasks, inputs, outputs, and decision points within a process. Detailed process mapping helps identify automation opportunities, understand dependencies, and streamline workflows. Thorough documentation of process steps provides a clear blueprint for RPA developers, ensuring accurate replication of the process in the automation solution.

A quick rundown on how to capture process steps.

PROCESS DISCOVERY

Start by discovering the processes that you want to automate. Identify the process steps, inputs, outputs, and decision points.

PROCESS MAPPING

A high-level process map provides a quick snapshot of system interactions. Utilize a high-level process map to quickly identify inefficiencies, bottlenecks, and optimized routes.

TOOL SELECTION

Select the RPA tool that best meets your automation needs. Consider factors such as features, pricing, scalability, integration, and security when selecting the tool.

PROCESS MODELING

It goes a step further by providing a blueprint for automating tasks, identifying automation opportunities, and guiding the design & development of RPA bots to execute process steps.

STAGE 3:
SELECTION OF RPA TOOL

Selecting the right RPA tool for implementing automation in a business process is a critical decision. It involves evaluating factors such as the tool's compatibility with existing systems, scalability, ease of use, flexibility, and security features. Additionally, considering the tool's support for various automation capabilities like data extraction, integration, and analytics is essential.

When selecting the right RPA tool, consider the following criteria:

01

FEATURES:
Consider the features offered by the RPA tool, including process capture, data extraction, machine learning, and AI capabilities. Analyze each tool's capabilities to determine which is best suited to your automation needs.

02

PRICING:
Consider the cost of the RPA tool and the pricing model, including licensing fees, maintenance costs, and training costs. Evaluate the cost of each tool to determine which one is most cost-effective for your organization.

03

SCALABILITY:
For your organization's growth and futuristic requirements, evaluate the scalability of each tool. This includes the number of processes that can be automated and the ease of scaling the solution.

04

INTEGRATION:
Consider the integration of the RPA tool with your existing systems and processes. Evaluate the compatibility of each tool with your existing systems and processes to determine which one is best suited for your organization.

05

SECURITY:
Consider the security of the RPA tool and the measures in place to protect sensitive data.

Choosing and implementing the right RPA tool for automation in your business process is often a challenging and daunting task. So, it is always recommended to seek assistance from a leading RPA implementation partner to ensure its effectiveness and success.

A quick look at the most popular RPA tools available

A feature-rich RPA tool that offers a wide range of automation capabilities, including process capture, data extraction, and machine learning.

An enterprise-ready RPA tool that is scalable and secure. It offers a robust process design and management platform.

An easy-to-use RPA tool that offers a wide range of automation capabilities and is suitable for organizations of all sizes.

An AI-powered RPA tool that offers advanced automation capabilities, including machine learning and natural language processing.
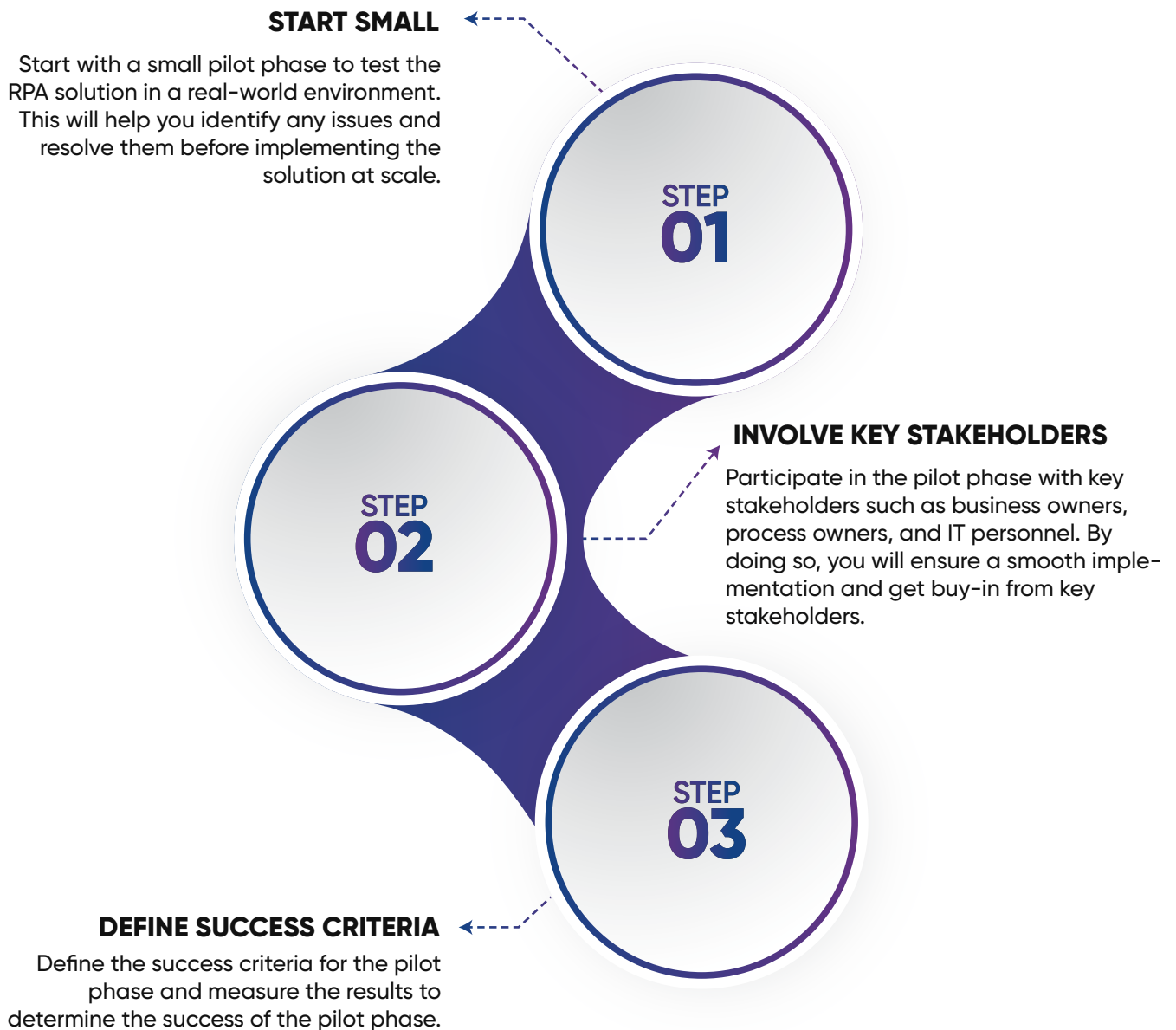
A cloud-based RPA tool from Microsoft that offers a wide range of automation capabilities and is integrated with other Microsoft tools.

S T A G E   4 :
PILOT

During this phase, a select set of processes or a specific business unit is chosen to undergo automation. The pilot stage allows organizations to evaluate the effectiveness of RPA, assess the feasibility of automation in real-world scenarios, and identify any potential challenges or adjustments needed. It provides an opportunity to fine-tune the automation workflows, validate the expected benefits, and gather valuable feedback from end-users.

Best practices for a successful pilot phase:

START SMALL

Start with a small pilot phase to test the RPA solution in a real-world environment. This will help you identify any issues and resolve them before implementing the solution at scale.

STEP 01

INVOLVE KEY STAKEHOLDERS

Participate in the pilot phase with key stakeholders such as business owners, process owners, and IT personnel. By doing so, you will ensure a smooth implementation and get buy-in from key stakeholders.

STEP 02

STEP 03

DEFINE SUCCESS CRITERIA

Define the success criteria for the pilot phase and measure the results to determine the success of the pilot phase.

IMPLEMENTATION

The implementation stage of RPA involves the actual deployment of the automation solution across the organization. It includes configuring and integrating the RPA software with existing systems, deploying software robots, and establishing communication channels between the bots and the target applications. It is a critical phase where the benefits of RPA begin to be realized, transforming business operations and driving efficiencies.

RPA implementation requires careful planning and execution. And choosing the right RPA implementation partner can greatly enhance the success and effectiveness of the automation initiative as it brings specialized expertise, cost and time efficiency, customized solutions, ongoing support, scalability, and risk mitigation."
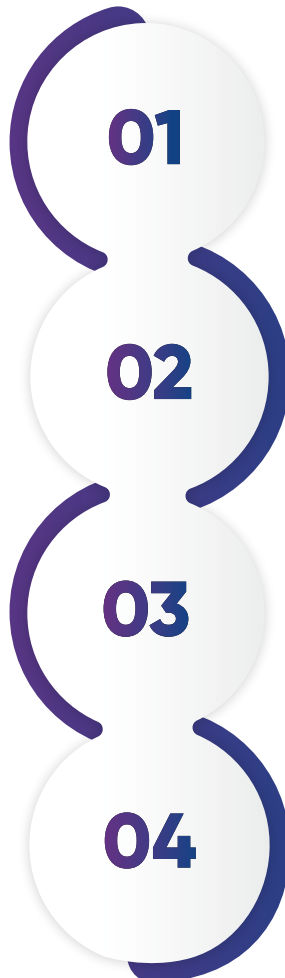
Tips for implementing RPA at scale:

DEFINE SUCCESS CRITERIA

Define the success criteria for the RPA implementation and measure the results to determine the success of the implementation.

01

02

PLAN FOR SCALABILITY

Plan for scalability by selecting an RPA tool that is scalable and can handle the increasing volume of processes that you want to automate.

SECURE YOUR DATA

Secure your data by selecting an RPA tool that is secure and implements security measures to protect sensitive data.

03

04

MONITOR AND MANAGE THE SOLUTION

Monitor and manage the solution to ensure that it is running smoothly and identify any issues that need to be addressed.

MANAGING RPA CYCLE

Managing the RPA cycle is an ongoing stage that involves monitoring, maintaining, and optimizing automated processes. It includes real-time monitoring of bot activities, performance metrics, and exception handling to ensure the smooth functioning of RPA. Continuous improvement efforts are undertaken by analyzing performance data, identifying bottlenecks, and implementing enhancements to drive further efficiencies.

This stage is essential for maximizing the benefits of automation and ensuring its long-term success within the organization.

The RPA (Robotic Process Automation) life cycle consists of several stages that include the assessment of business processes, selection of the right RPA tool, capture of process steps, pilot, implementation, monitoring, and optimization.
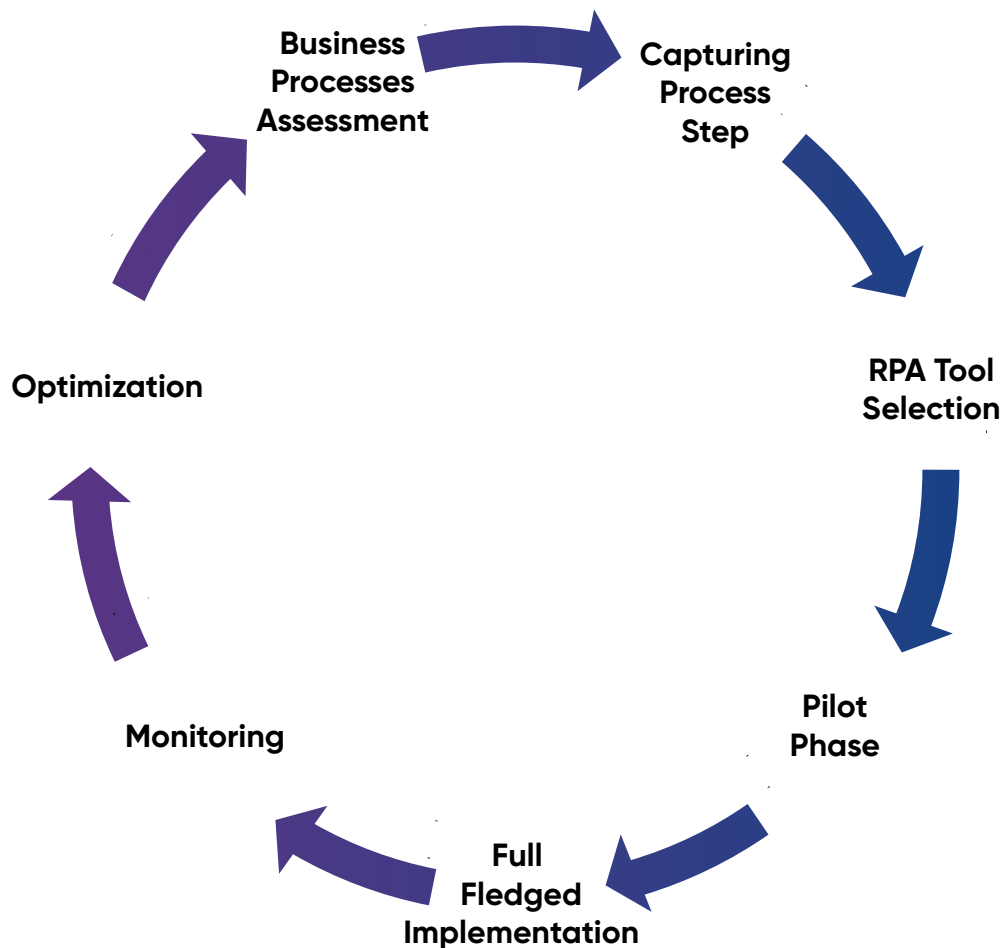
BEST PRACTICES FOR MAINTAINING & OPTIMIZING RPA PROCESSES

Maintaining and optimizing RPA processes require adherence to best practices to ensure long-term success. Here are some key practices to consider:

REGULAR MONITORING AND PERFORMANCE ANALYSIS

Continuously monitor the performance of RPA processes, including bot activities, error logs, and exception-handling. Set up performance metrics and alerts to detect any issues promptly. Analyze data to identify bottlenecks, inefficiencies, or areas for improvement. Regularly review and optimize the processes based on the insights gained.

ROBUST EXCEPTION HANDLING

Develop comprehensive exception handling mechanisms to handle unexpected scenarios or errors during automation. Implement proper error logging and notification systems to ensure that exceptions are appropriately handled. Continuously refine the exception-handling process to minimize disruptions and improve the reliability of the RPA solution.

ONGOING MAINTENANCE AND UPDATES

Establish a maintenance schedule to apply software updates, security patches, and system optimizations for the RPA infrastructure. Regularly review and update the automation scripts and configurations to keep up with anychanges in the underlying systems or processes. Perform periodic health checks to ensure the stability and effectiveness of the RPA processes.

CONTINUOUS IMPROVEMENT AND OPTIMIZATION

Foster a culture of continuous improvement by encouraging feedback from RPA users and stakeholders. Regularly evaluate the performance and efficiency of the automation processes and identify areas for optimization. Leverage analytics and process mining techniques to gain insights and make data-driven decisions for process enhancements.

DOCUMENTATION AND KNOWLEDGE MANAGEMENT

Maintain comprehensive documentation of the RPA processes, including process maps, automation scripts, and standard operating procedures. Document any changes or updates made to the processes. Establish a centralized knowledge management system to store and share RPA-related documentation, ensuring easy access and collaboration among the RPA team and other stakeholders.

COLLABORATION AND COMMUNICATION

Foster collaboration between RPA teams, business users, and IT departments. Encourage open communication channels to share insights, address issues, and gather feedback for process improvements. Regularly engage with stakeholders to understand their evolving needs and align RPA processes accordingly.

SCALABILITY AND FUTUREPROOFING

Design the RPA processes with scalability in mind to accommodate future growth and increased automation requirements. Consider future technologies, such as artificial intelligence and machine learning, and evaluate their potential integration with existing RPA processes. Continuously evaluate and prioritize automation opportunities to ensure that the RPA solution remains aligned with business goals and objectives.

By implementing these best practices, organizations can maintain and optimize their RPA processes effectively, drive continuous improvement, and achieve sustained benefits from their automation initiatives.
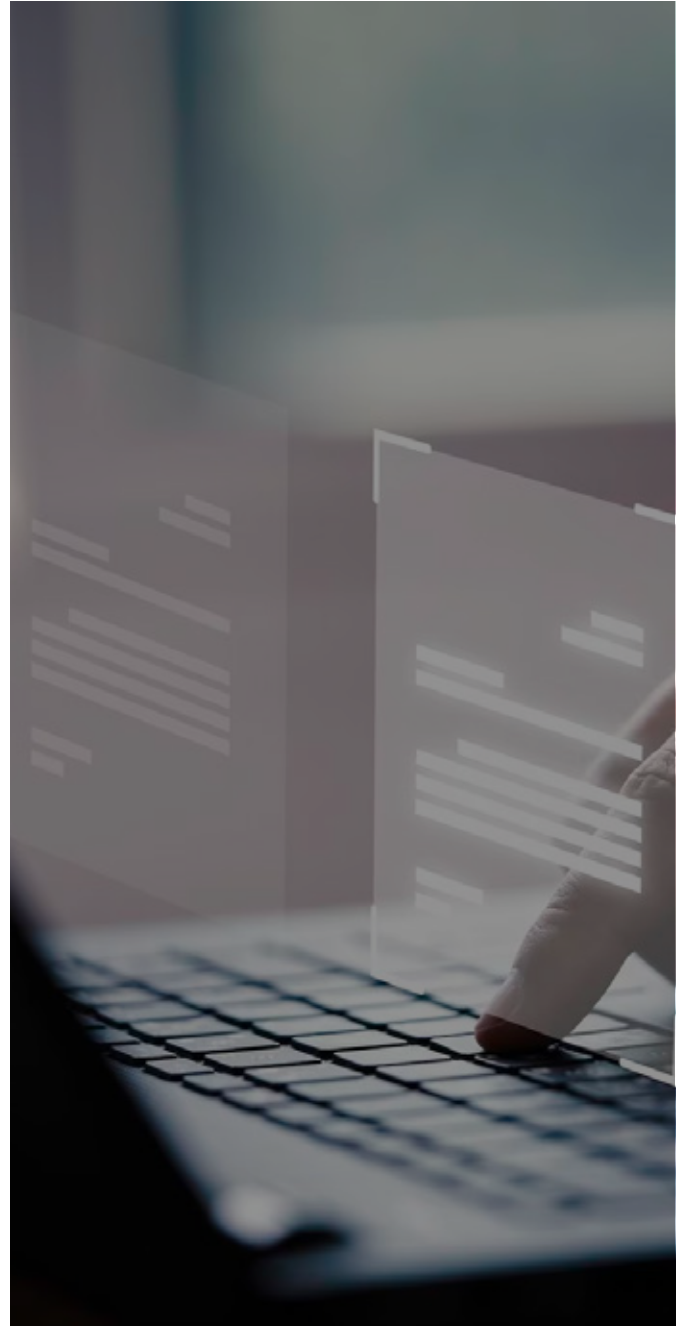
RPA SUCCESS STORIES ACROSS DIFFERENT INDUSTRIES

INDUSTRY: LEGAL
BRAND: A LEADING LAW FIRM

The client is an award-winning American law firm that specializes in fighting against wrongful corporate practices to recover losses and demand corporate reform. The organization had difficulty in efficient user onboarding, case filing and processing complaints, and client communication – due to a Manual & Time-intensive Process.

With a successful RPA implementation, Icreon delivered an automated digital platform capable of performing end-to-end manual activities of the dispute resolution process – with less human intervention. Through minimizing human involvement, the firm effectively utilized the power of RPA to enhance efficiency and streamline laborious tasks such as user onboarding and case execution.

INDUSTRY: ASSOCIATIONS
BRAND: ASTM INTERNATIONAL

ASTM International, a not-for-profit standard-based organization, harnessed RPA software benefits to convert 100+ years old technical standards into digital assets to keep up with the current market demands of making consumers' world better. More than 1800 old data repositories moved to standard Postgres, MSSQL, DocumentDB, and MongoDB databases. The Icreon team automated the migration process using Robotic Process Automation and extended the functionality of the business model to provide greater insights to departments of various industries without investing heavily in developing APIs.

INDUSTRY: ENTERTAINMENT
BRAND: IMG MODELS

IMG Models is an international leader in talent discovery and model management, globally recognized for its diverse client roster across the globe. IMG was facing challenges due to operational inefficiencies involving the manual approach for vetting model profiles before onboarding them – a costly and delayed onboarding process. IMG Models was in need of a scalable solution that would automate its processes and save time, effort, and cost in onboarding models.


To overcome this challenge, Icreon offered RPA implementation services into the business model. Several RPA-based workflows were built to automate the process of vetting model profiles before onboarding them. For instance, a notification and action center was introduced to track all activities within the apps to generate further alerts. With this successful RPA implementation in the existing business model, IMG Models was able to improve operational activities as well as to cut down on time and cost involved.

INDUSTRY: MANUFACTURING
BRAND: H+K INTERNATIONAL
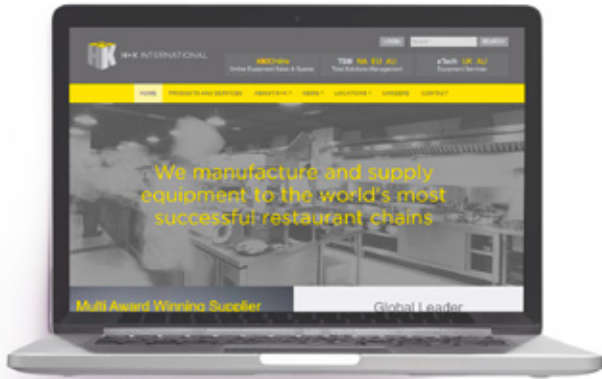
H+K International, a leading kitchen equipment manufacturer, was struggling with its legacy ERP-based system to manage its inventory. Through legacy system modernization via RPA, Icreon helped the company build a web-based enterprise solution for maintaining and updating its product catalog and process orders received.

Through a powerful implementation of RPA to innovate and transform business models, the organization was able to gain better business insights into their products and client behavior.

INDUSTRY: REAL ESTATE
BRAND: SITECOMPLI

SiteCompli is an American organization with an aim to deliver innovative solutions for property management. In 2010, when the organization reached out to Icreon, they were looking to develop an online platform that could ease the hassles of overworked property managers in New York City. New York City has a stringent and complicated compliance environment for the real estate industry.

Icreon introduced RPA implementation within their property management application to protect businesses against violence, fines, and penalties while fetching information from NYC government websites regarding changes in rules and regulations.

About Icreon

Icreon is an advanced digital solutions agency built for challengers who need to get to 'What Comes Next'. They help businesses define the future of their customer experiences, then enable them through technology engineering and the power of digital. These robust experiences guide customers through and beyond a commerce transaction and into a continuous and ongoing relationship with client brands. Founded in 2000, Icreon has been helping businesses of all sizes, from Fortune 500s and mid-markets, usher in a new age of digital maturity resulting in more efficient and powerful brands.

Headquartered in New York City, Icreon's global capabilities expand across Washington D.C., Philadelphia, New Delhi, and Pune offices. Companies such as GSK, Novartis, Jazz Pharmaceuticals, New York Road Runners, Lincoln, and more, partner with Icreon to fulfill their digital transformation needs.

With over 350 technology experts across engineering, digital strategy, and user-experience design, Icreon is the preferred digital transformation agency equipping growth brands for the now and next.

Explore Icreon's Digital Experience Solutions

Learn More