bluegoldRPA enablement product content

08.2021

BlueGoldRPA

by digitalmind

Plan, design and implement RPA technology for intelligent process automation and data management.

- **Increase your business productivity**
- **Save costs**
- **Reduce data errors**

with a proven approach from Digital Mind.

Earn more trough our L-D-P framework

TODAY'S FOCUS

LEARN

Digital Mind RPA Enablement Workshop is designed for companies who are exploring process automation and data management solutions. The 1 day practical workshop is an effective way for the clients to understand how RPA works and discover the manual processes of their organization which are eligible for automation and would return the greatest results.

ENABLEMENT WORKSHOP

DESIGN

Digital Mind Poof of Concept (PoC) and strategy development service is the next step for organizations to experience and validate benefits of RPA solutions for process optimisation. This PoC service is a structured and managed pilot project where one identified process is automated to validate the value hypothesis for RPA opportunity at customers organisation.

PROOF OF CONCEPT

PERFORM

Digital Mind RPA implementation service follows enablement and PoC stages and ensures RPA technology implementation and a broad scale of various process automation within customer's organization. Previously developed RPA implementation roadmap and identified process catalogue are used to plan and structure continuous implementation services for longer period.

PRODUCTIVE IMPLEMENTATION

AGENDA OF ENABLEMENT WORKSHOP

PREPARE AND INTRODUCE → **DISCUSS AND ENVISION** → **DEFINE NEXT STEPS**

TIME PLAN: 10:00 – 12:00 / 13:00 – 14:25 / 14:35 - 16:00

ASK QUESTIONS ANY TIME: RAISE VIRTUAL HAND OR TYPE YOUR QUESTION IN MEETING CHAT

CONTENT AND GOALS OF ENABLEMENT WORKSHOP

YOUR GAINS

- Learn what is RPA and how this works
- Discover how RPA techology could help your organization
- Envision how RPA could be implemented at your organization

WORKSHOP FEATURES

- Learn about RPA technologies, how they work and how they generate results
- Learn about practical use-cases and references from customer projects
- Discuss your organizations process automation and data management needs, get a better understanding of potential automation areas
- Identify a process for Proof of Concept pilot project automation. Develop a simple value hypothesis for the selected PoC
- Define high level brief for RPA implementation
- Get advice and recommendations from Digital Mind's *Intelligent process and RPA* consultants

DELIVERABLES

- RPA technology deep-dive in presentation
- PoC brief and value hypothesis
- High level brief for RPA implementation

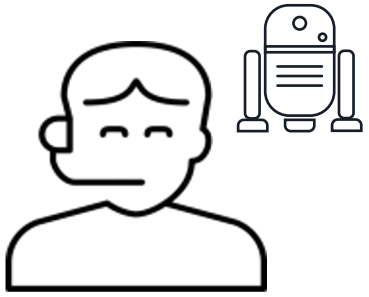
INTRODUCTION TO RPA

WHAT IS ROBOTIC PROCESS AUTOMATION

- RPA is a business process automation technology
- Software bots / virtual assistants are performing repetitive activities for humans
- Tasks that can be driven by business rules and don’t need intuition
- Replicating human interactions with computerized systems on the UI level
- Typical use cases:

TWO TYPES OF ROBOTS

ATTENDED MODE

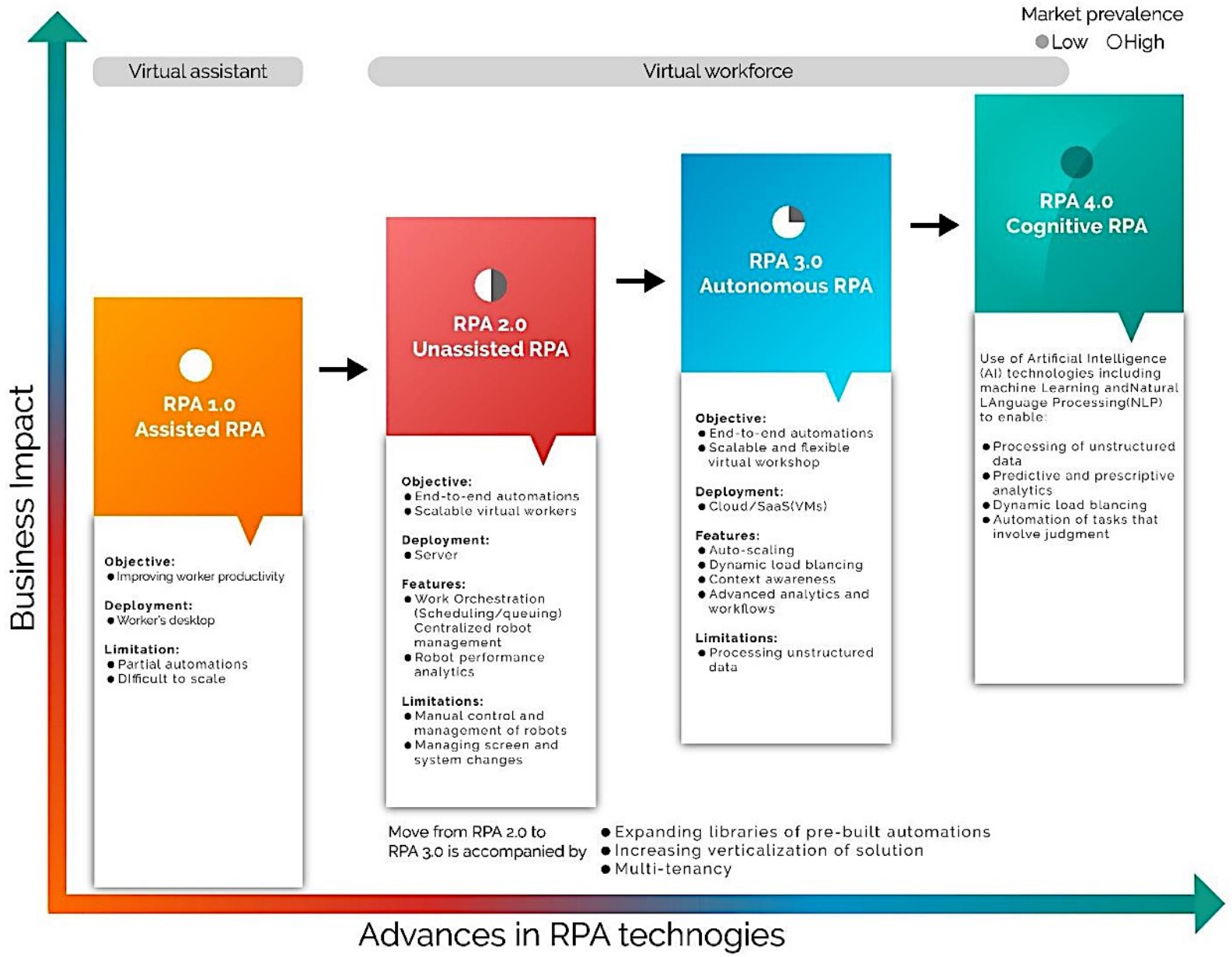


- Robots **ASSIST** human workforce
- Robots live on users` **DESKTOP**
- Worker can run the robot to complete particular tasks
- Examples:
  - Call center
  - Front office operations
  - AML/KYC

UNATTENDED MODE

- Robots **REPLACE** human workforce
- Robots run on the **SERVER** without supervision
- Human intervention only in case of exceptions
- Examples:
  - Invoice processing
  - Report from EDS
  - Data migration from legacy systems

EVOLUTION OF RPA

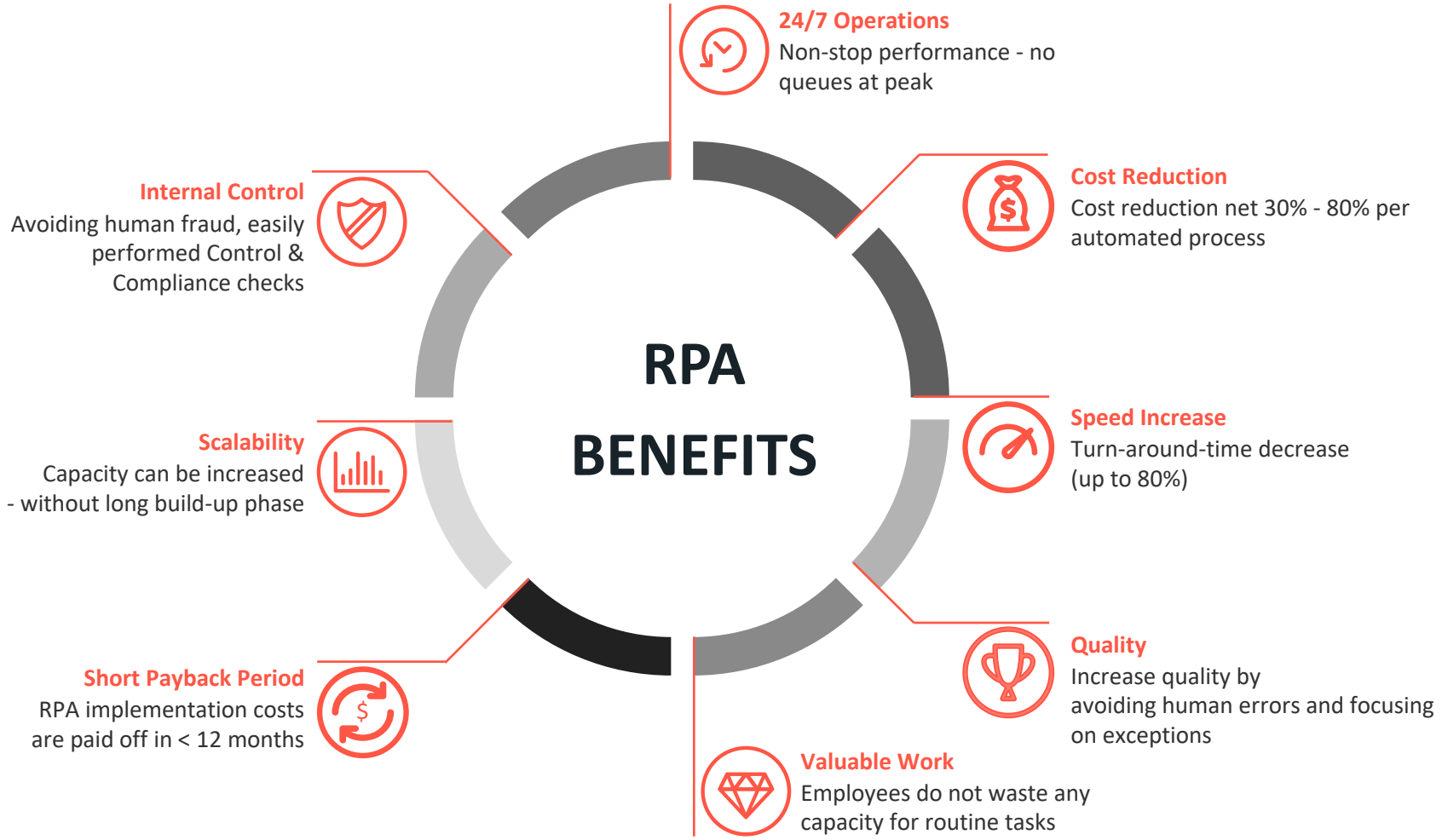


Source: AIMDek Technologies

digitalmind

ROBOTIC PROCESS AUTOMATION - A TRUE GAME-CHANGER

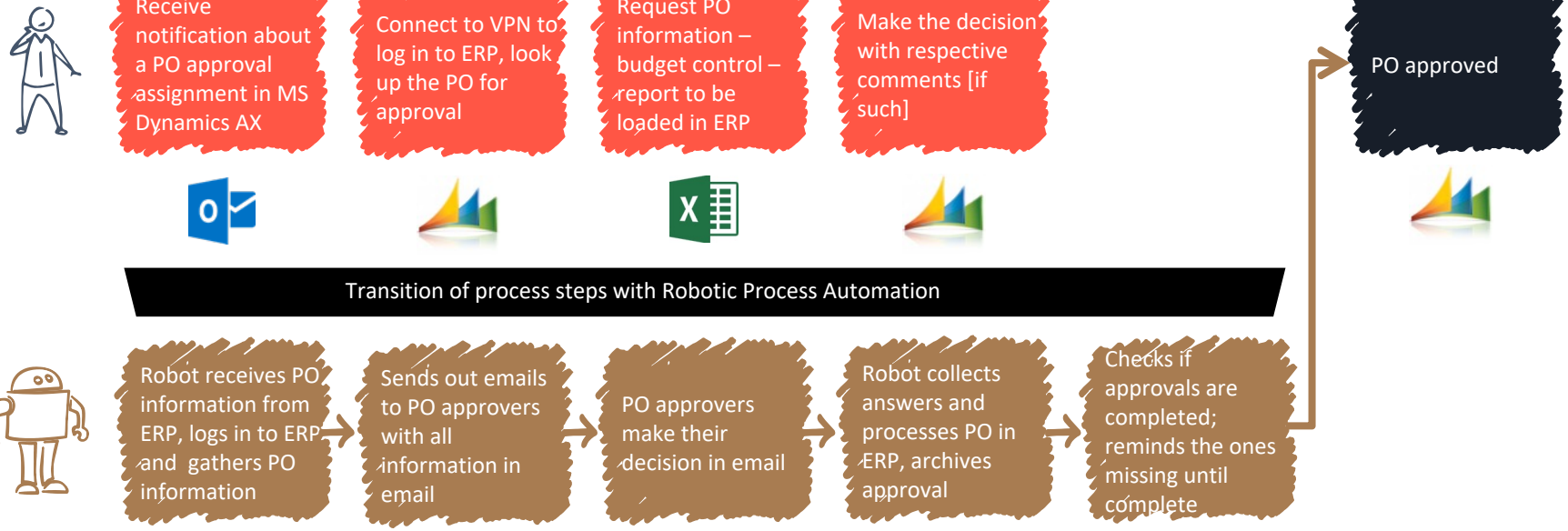
Investment into a robotics project will pay out quickly by exploiting many benefits of RPA



ROBOTIC PROCESS AUTOMATION - UNLEASHING THE FULL ROBOTIC POTENTIAL

A real-life example revealing scope of a digital workforce – PO approval

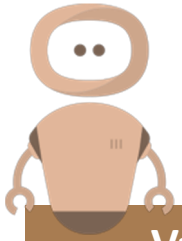
When approving PO, email notifications from ERP to approvers are used to trigger associated budget controls. Copying information and retrieving data from ERP to perform analysis takes a lot of time and requires dedicated effort and attention. Many people are involved and delayed answer results in long process cycle, ERP licenses are used, multi-tasking and switching among systems takes attention off more important tasks.



END-TO-END AUTOMATION
SAMPLE RPA USE CASES

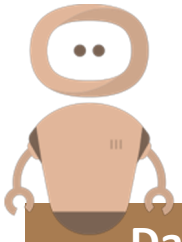
MEET THE SAMPLE ROBOT TEAM

Common types of robot-functions that are used to build intelligent process automation solutions



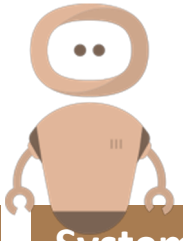
Validation and verification robot

The validation robot is typically used to make a real-time call to a 3rd party system to verify the accuracy or authenticity of a financial transaction. Typically replaces a human “sanity check.”



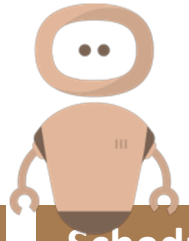
Data entry robot

The data entry robot takes already electronic data and feeds it into another system. Best used when integration is expensive or requires complex logic paths.



System integration robot

A system integration robot is used to “patch” a connection to a system that would otherwise be complex or labor-intensive to integrate, but that would be cost prohibitive through traditional means.



Scheduled/trigger robot

These robots take on tasks that are simple in nature but cannot be executed until a certain event takes place. Best to assist with monthly closing tasks.

- In most processes there are similar types of actions needed – extract data, validate or manipulate data, enter data, trigger another event or process etc
- Those types of actions are defined in in re-usable software code
- This code is used then to build variety of process automation solutions for different business functions

FINANCE USE CASE: INBOUND/OUTBOUND INVOICING

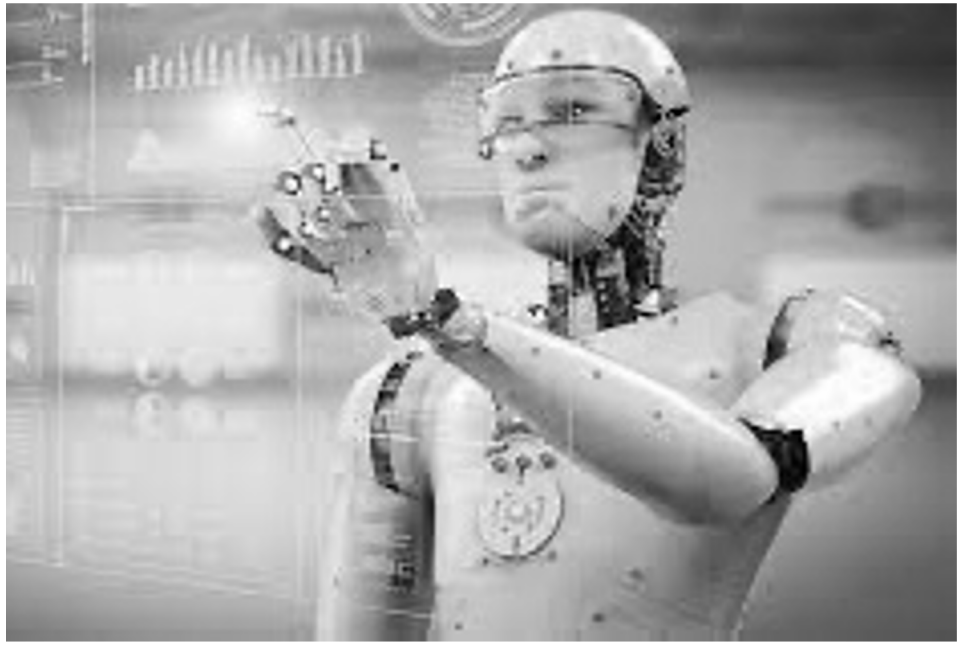
- **Problem:** Buyers and sellers must connect to numerous online e-Invoicing portals and enter or retrieve invoices, payments, or even purchase orders. This can be on either the inbound (buyer) or outbound (seller) side.
- **Solution:** RPA data entry robots enter invoice data on each e-Invoice portal
- **Benefits:** The process is entirely manual in most cases. API or ERP integrations are complex and unreliable, meaning most companies can only afford to integrate one or two e-Invoicing providers, while their ecosystem uses dozens. RPA invoice robots can scale to any number of portals, eliminating manual effort and reducing errors, which leads to lower headcount.

FINANCE USE CASE: SALES ORDER VALIDATION

- **Problem**: The process of entering a sales order from an incoming P.O. is complex and unique at most companies. Many items must be manually validated before an order can ship – price, part number vs. description, availability, etc.

- **Solution**: RPA verification robots check 3rd party data systems in real time during order processing.

- **Benefits**: Orders can be processed faster and with fewer errors, meaning goods are shipped correctly, customers are happier, and returns are lower. This results in lower DSO, better customer retention, and lower costs.



FINANCE USE CASE: FINANCIAL CLOSE COMPLETION

- **Problem:** At the end of each month/quarter/year, the accounting and finance teams must complete hundreds or even thousands of simple tasks, reconciliations, and journal entries to close the books, but they are all related in a complex sequence of interdependent events

- **Solution:** RPA scheduling and reconciliation robots.

- **Benefits:** Shorter close time can not only equal massive headcount savings, but it can help close the books faster, meaning CFOs can report earnings faster, have greater confidence in the accuracy of data, and run reports in real time

RPA PROCESS SAMPLES – CUSTOMER PROJECT

- Campaign confirmation
- Purchase orders confirmation / submitting
- Imports into the system of bank statements and linking payments to debtors
- Vehicle / machines hours registering in the system
- Exchange rates registering in the system
- Currency conversion
- Invoicing based on excel price list prices
- Interest calculation and billing to related parties
- Credit control - automatic confirmation without the intervention of the credit controller for the fulfillment of the conditions of xx
- CAPEX Project Creation
- Credit control - initiates confirmation
- Monthly based depreciation of next periods expenses
- Predefined field checks or missing something identification for debtors, creditors and stock cards and the updating information
- Regular report updates and automatic email for interested employees
- Leasing bills posting
- Invoicing service bills - based on standardized information, received in Excel by requesters
- Intercompany reconciliation & automatic posting
- Posting of standardized / typical invoices
- Extracting standard data from ERP (focus on those regular reports, that requires time to update)
- Reconciliations, and journal entries to close the books

DISCUSSION AND PROCESS ANALYSIS

DISCOVER RPA POTENTIAL AT YOUR ORGANIZATION

CHOOSING THE BEST PROCESSES FOR ROBOTIC PROCESS AUTOMATION

#01 The Human Factor

- Which processes take up a large percentage of employees' time?
- Which processes require a high percentage of dedicated staff?
- Which processes require hiring of additional staff during seasonal spikes in workload?
- Which processes have the highest percentage of human error?

#02 Complexity

- How many steps are involved in the process? (both user steps and integration steps)
- Does it include critical functions?
- How many different applications does the process use end-to-end?
- Are there decision points within the process that require human intervention?
- What is the estimated delivery time to develop the automation scenario?

#03 Stability

- How often does the process get changed?
- How much does it change?
- What is the lead time for change?
- Is the third-party application friendly to your bot?

IDENTIFIED PROCESSES / FUNCTIONS FOR AUTOMATION

1

FINANCE

- Process 1
- Process 2

2

CUSTOMER SERVICE

- Process 1
- Process 2

3

SALES

- Process 1
- Process 2

4

HR

- Process 1
- Process 2

5

COMPLIANCE

- Process 1
- Process 2

6

OTHER

- Process 1
- Process 2

TOP INITIATIVES IDENTIFIED

Describe here processes / ideas that are most likely candidates for PoC

#1 INITIATIVE

CURRENT PROBLEM

- Describe

PROCESS AUTOMATION SOTRY (PROSPECTIVE SOLUTION)

- Describe

VALUE / BENEFITS HYPOTHESIS

- Describe

#2 INITIATIVE

CURRENT PROBLEM

- Describe

PROCESS AUTOMATION SOTRY (PROSPECTIVE SOLUTION)

- Describe

VALUE / BENEFITS HYPOTHESIS

- Describe

SUGGESTED NEXT STEPS

PROOF OF CONCEPT PROJECT DEFINITION

AS IS story	TO BE story	Benefits	Changes needed
Describe here *How the process is being executed today and what are the main issues* *leadlly if current issues can be quantified – cost per process, hours required for manyal work etc*	*Describe here* *How the process will be automated and executed after the project implementation*	*Describe here* *What will be the improvements – time saved by x resulting in y, process velocity raised by z times etc* *Try to define some measurable units that can be verified after the project and used as proof of value*	*Describe here* *What will change for whom how they do their work* *What changes in IT systems needed if any* *Who should be involved into PoC project*

RPA ROADMAP IN YOUR ORGANIZATION

RPA doesn't disrupt the structure of existing underlying information technology systems in your organization. RPA bots work on top of existing applications, just like humans do, thus implementation is quick and and helps your employees work more productive immediately.

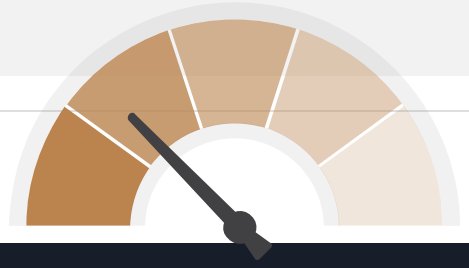
STRATEGIZE

Understand your existing processes

Process transparency is key to successful RPA implementation. As processes regularly undergo change, organizations should establish a robust change management function to keep track of process variations.

Define goals and expectations

Define your RPA objectives before you begin to build the RPA infrastructure. Are you aiming to lower labour costs? Reduce error rates? Lower SLAs? Raise ROI? Knowing which KPIs matter ahead of time is key to effective RPA implementation.



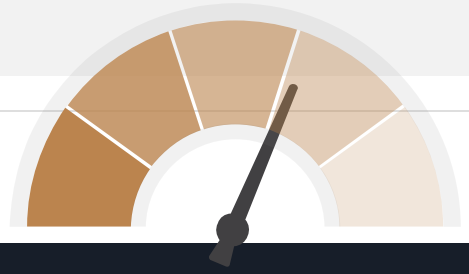
BUILD FUNDAMENTALS

Establish RPA competence team

An RPA competence team (CT) provides the strategy and vision governing automation across your organization. CT typically identifies automation possibilities, build operating models, develop change management and continuous improvement capabilities, manage interactions with other units in the company.

Build RPA infrastructure

For RPA implementation and ramp-up, proper infrastructure is needed, with development, testing & production environments. As application servers can be defined in active-active mode, consider adding a server for redundancy and stability purposes.



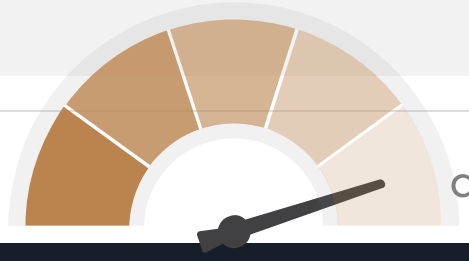
DELIVER RESULTS

Define RPA governance framework

Create RPA program governance structure that takes into account your organisation's existing risk and compliance frameworks and performance measures. Your governance framework would outline the operating procedures, implementation guidelines and RPA software administration to ensure proper deployment and maintenance of intelligent processes

Automate processes

Clearly set process automation priorities following the defined list of identified processes. Aim for continuous process improvement by allowing approx. 20% of available team's time to be invested in support and maintenance of already implemented intelligent processes



DigitalMind

b2b technology experts

Focus	Process efficiency and intelligent work
Domains	Information flow digitization Process and data management automation Mobility Compliance
Services	Consulting B2B technology implementation
Products	**3rd party software + implementation services**

Established	2004
Market	Baltics
Offices / Teams	Riga, Tallinn /25 experts
Certificates	ISO 9001:2008
Membership	BICG; LRTK
NPS	8,3

digitalmind

PAYING CUSTOMERS (SELECTION)

Swedbank
conexus BALTIC GRID
Republic of Estonia Tax and Customs Board
directo
coop | Pank
eesti gaas
Republic of Estonia Ministry of Defence
Telia
Citadele
Intergaz
Eesti Maavara
TELE2
Danske Bank
NESTE
Stoli STOLI GROUP
merko
Eesti Pank
Binders
AMBER BEVERAGE GROUP
LINSTOW CENTER MANAGEMENT
altero.lv Finanšu salīdzināšanas platforma
ACB UZŅĒMUMU GRUPA
FOOD UNION
EVERSHEDS SUTHERLAND BITĀNS
ERGO
LATVIJAS DZELZCEĻŠ
Dobele DOBELES DZIRNAVNIEKS
digitalmind

digitalmind

www.digitalmind.lv / www.bluegoldrpa.com