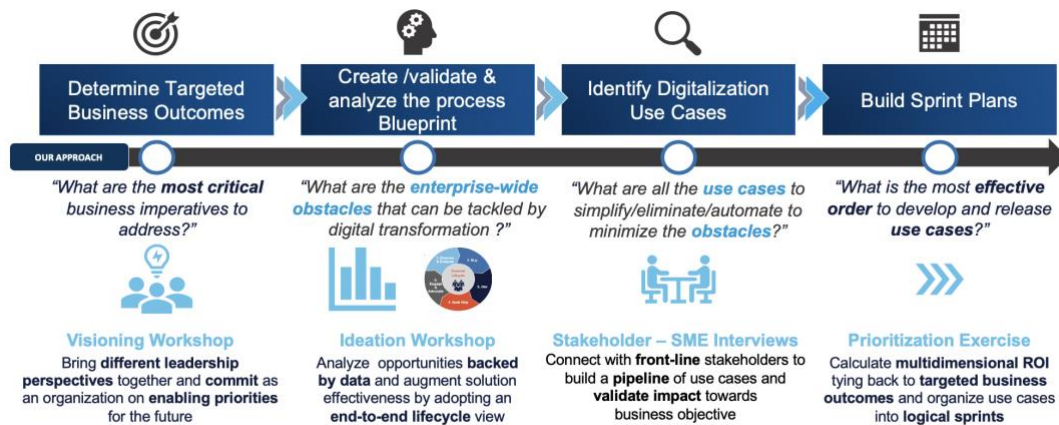


Ingram Micro HPS - Microsoft – Discovery Package

The initial steps to undertake in delivering the organization’s goals are to identify the most critical business imperatives that we need to address and what are the approaches to conduct to ensure the goal will be met. There are different stages and methodologies the team follows to ensure a clear roadmap and execution strategies are delivered.



1. **RPA Visioning Workshop** – The goal of the workshop is to bring all the organization's leadership perspectives together and identify the critical goals to commit to as an organization through Automation / Digital Transformation. Based on these goals, a digital transformation roadmap will be created with various short-term and long-term activities relevant to the goals.
2. **Ideation Workshop** – From the identified goals and opportunities, the project team will gather relative information about the process where the opportunity lies, analyze the available data, and validate the feasibility of automation. The conclusion of an Ideation Workshop is the presence of a ‘Business Opportunity List Tracker’ wherein a suitable high-level fitment study is performed, and automation potential is arrived at.
3. **Stakeholder – SME Interviews** – during Process Discovery sessions, it is important to get the RPA (Robotic Process Automation) Business Analyst meets with a Subject Matter Expert (SME) from a business unit or department to map the As-Is process, the meeting is typically driven by several objectives and expectations from both parties. Here's an outline:



Objectives of the RPA Business Analyst:

1. **Process Understanding:** Gain a deep understanding of the current process, including its purpose, inputs, outputs, and steps involved.
2. **Identify Automation Opportunities:** Identify the parts of the process that are manual, repetitive, and rule-based, which are usually the best candidates for automation. Also, look at other potential digital transformations that could be applied to the process to aid in the main objective.
3. **Uncover Bottlenecks and Inefficiencies:** Look for areas within the process that are inefficient or prone to error and could benefit from automation.
4. **Develop a Process Map:** Document the process in detail, creating a process map or flowchart that outlines each step.
5. **Clarify Technical Requirements:** Understand the technical aspects of the process, such as the systems and tools currently in use, and when those applications and systems undergo upgrades and/or maintenance.
6. **Establish Success Metrics:** Define what a successful automation outcome looks like and how it will be measured against the wider business unit or department goals.

Expectations from the SME:

1. **Explain the Process:** Provide a detailed explanation and demonstration of the process, including any nuances or exceptions that the analyst needs to be aware of.
2. **Identify Pain Points:** Share pain points, frustrations, or challenges with the current process that could potentially be addressed by automation.
3. **Collaborate on Solutions:** Work together with the analyst to brainstorm potential automation solutions and improvements.
4. **Provide Access to Necessary Resources:** Provide the analyst with access to any tools, systems, files, or data necessary to understand the process and develop the automation solution.
5. **Commitment to Change:** Be open to changing existing processes and adopting new technologies.



Key considerations are:

1. **Process Understanding:** The team needs to have a thorough understanding of the process to be automated, including all steps, rules, exceptions, inputs, and outputs.
2. **Process Simplification and Standardization:** Before automating, it's essential to assess if the process can be simplified or standardized. Automating a complex, inefficient process will only replicate inefficiencies.
3. **Compatibility and Integration:** The RPA solution must be compatible with the existing IT infrastructure and able to integrate seamlessly with the software systems involved in the process.
4. **Security and Compliance:** The team needs to ensure that the automation solution complies with all relevant security and data privacy regulations. This includes considering how sensitive data will be handled and ensuring an audit trail for compliance.
5. **Scalability:** The architects should consider the scalability of the solution. Can it handle an increase in volume? Can it be easily adapted or expanded for additional processes?
6. **Resilience and Error Handling:** The solution should be designed to handle exceptions and errors gracefully. This includes building in alerts or fallback procedures when the process encounters unexpected situations or when the automation fails.
7. **User Interface (UI) Stability:** Processes that heavily depend on UI elements can be more fragile as changes in the system's UI can break the automation. In such cases, we would consider using APIs or other integration methods if possible.
8. **Performance and Efficiency:** The automation should improve the performance and efficiency of the process. This requires considering factors like the speed of execution, the level of human intervention required, and the accuracy of the automation.
9. **Maintenance and Support:** Like any software, RPA solutions require ongoing maintenance and support. This includes updates to adapt to changes in the underlying systems, handling of bugs or errors, and user support.
10. **Change Management:** Implementing RPA often involves significant changes in working practices. This requires careful management, including communication, training, and support for the affected employees.
11. **Measuring Success:** Finally, the team needs to define how the success of the automation project will be measured. This could involve metrics



like time saved, increased accuracy, improved capacity, cost savings, or ROI.

These considerations will help ensure the successful implementation of the automation solution and help your organization achieve its objectives with RPA.

1. **Build a plan to execute** - the automation opportunities identified during the process discovery will be categorized into different complexity levels: **Low**, **Medium**, or **High** complexity solutions based on the ease of delivery, readiness of the process and technology for automation, and the scalability of the solution itself. Each complexity range follows the delivery timeline of 4 weeks to 12 weeks build depending on the size of the automation effort.

Anchoring back to addressing the most critical business imperatives to address, an execution roadmap will be drawn, usually in phases, prioritizing the low-hanging fruits/ quick wins and opportunities that are highly impacting day-to-day operations.

Our project team then proposes a solution with the corresponding effort, timeline, and cost. This also details the business benefit of leveraging automation to address the challenge, with clear and concise charts outlining delivery and ROI. In this document, there are broadly two ways we identify benefits:

1. **Financial Benefits** – these are the Productivity Savings (FTE Savings, converted to GBP as an annual saving) derived from automating a process.
2. **Non-financial benefits** - based on quality improvement (measured from current KPIs as a baseline) or operational impact such as an increase in accuracy, increase in customer and user satisfaction, potential revenue leakage, potential sales increase, legal and compliance, etc.

The figure below provides guidance on how business goals are impacted by digital transformation initiatives:



How Do We Define Meaningful Goals?



We use this as a standard way of helping our customers understand the benefits of RPA to their business and have most recently provided this for Leicestershire County Council. The same methodology was applied to different private sectors we've previously engaged, varying from industries and verticals such as Information Technology, HR, Contact Centres, Go-to-Market, and F&A to name a few.

