

NO RIP AND REPLACE NEEDED:

A 6-STEP STARTER KIT

to Implementing Robotic Process Automation

KOFAX 

 www.robotydoroboty.pl
Automatyzacja procesów i przepływów robót

 **RHENUS**
LOGISTICS

How to Digitally Transform the Way You Work

Many organizations still rely on manual tasks for vital business processes, such as collecting, reviewing and inputting information between systems, websites and portals – internal and external.

These repetitive, remedial tasks require your employees to log in and out of multiple systems, copying and pasting data between different sources and formats. In addition to being mind-numbing work, manual tasks are also highly inefficient and inaccurate – especially when compared to the predictability of automated work processes.

But, as IT departments struggle to respond rapidly to the more pressing needs of business groups, key automation initiatives tend to get postponed, rescheduled or forgotten. The result is manual work lives on, and the status quo for inefficient operations remains.

The good news is there is an emerging solution called robotic process automation (RPA). Although RPA might evoke an image of a shiny metal robot stealing your chair and taking over your keyboard, it is actually a software solution that can digitally transform the way you work.



FACT

Employees waste 22% of their time on manual, repetitive tasks.

RPA Can Be Deployed in a Matter of Weeks, not Months

RPA is easier to implement than you think.

RPA is emerging as a viable technology for solving data integration and automation challenges that never seem to get solved. With RPA, intelligent software robots are configured to perform tasks previously performed manually by a person, freeing up your employees for more valuable work.

Thanks to cost-effective RPA solutions, organizations are achieving quick and powerful results. Businesses across all industries and sectors are leveraging RPA to slash processing times, cut costs and outpace their competitors.

You don't need to disrupt your daily operations to get up and running with RPA. And, even better news, it can be deployed in a matter of weeks, not months, as it does not rely on the use of complex APIs and coding.



FACT

The IT robotic automation market will reach US\$4.98B by 2020. It is forecasted to grow at a 60.5% CAGR from 2014 to 2020.¹

¹Transparency Market Research

How to Join the Robotic Revolution

In this guide, you'll learn how to gain the benefits of RPA – without ripping out or replacing your current systems or putting your organization at risk. You'll discover:

- How to identify exactly which manual tasks to automate, so you can focus employees on innovation and more valuable work
- Keys to quickly gaining executive and IT buy-in for an RPA implementation
- Who should – and shouldn't – design RPA for your organization. And who should beta-test it
- Best practices from industry analysts that will help ensure your RPA implementation is a success
- How to avoid common pitfalls that can slow you down and increase your costs

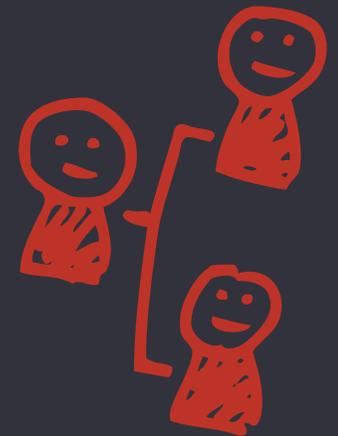


Read on to learn more about RPA and how to harness its power for your organization.

Discover integration tips and how to prepare your business for RPA, so you can streamline your processes and achieve big results. It's easier than you think.

Rid Your Organization of the **Manual Malaise**

with RPA

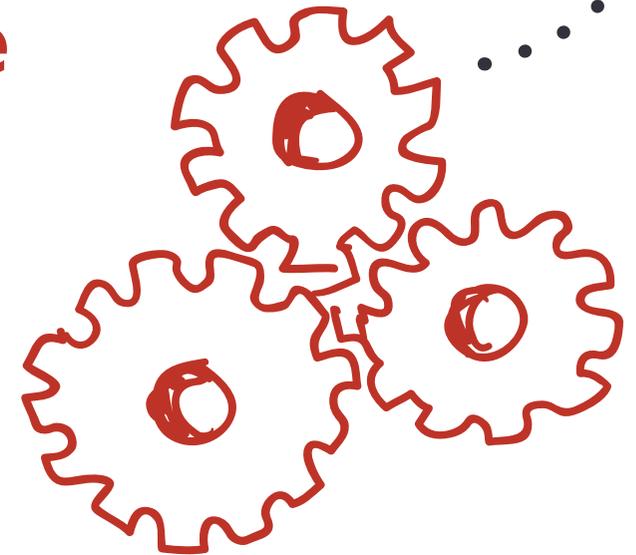
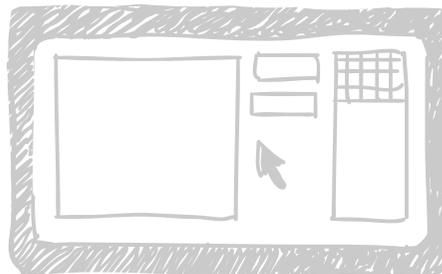


Core Business Processes are Sometimes Hard to Automate

Many organizations still rely on error-prone manual tasks in key areas of their businesses.

According to the Cognizant Center for the Future of Work,² organizations automate just 25-40% of their workflow. Meanwhile, employees spend 22% of their time on mundane, repetitive tasks.

Although many organizations have applied some level of process automation, many tasks still fall through the cracks. The gaps could be caused by legacy systems that are difficult to integrate with modern applications or by data collection from external sources, such as portals, which can be difficult to integrate with internal processes. In addition, some core business processes have numerous exceptions that fall outside of normal automated processes.



Gartner stated:

"Most organizations still have a lot of routine processes that use employees to manually manipulate structured and unstructured data. The reason these processes have escaped automation until now is a mélange of traditional practices, cost of integration of systems and lack of organizational discipline around multiple process variations."³

²Cognizant Center for the Future of Work, The Robot and I: How New Digital Technologies Are Making Smart People and Businesses Smarter by Automating Rote Work, 2015

³Gartner, Use Cases for Robotic Process Automation: Providing a Team of 'Virtual Workers', 26 October 2015, Foundational November 2016

Growing The Costs of Not Automating Manual Tasks

But if you don't address these process challenges now, here's what could happen:

- Operational inefficiencies and reduced productivity
- Slowed customer responsiveness and dissatisfaction
- Compliance and security risks
- Inconsistent workflows or processes leading to lost revenue
- Increased labor costs for employees to do manual, repetitive work
- Lack of visibility into processes and inability to pinpoint problems

Despite these risks, automating these manual tasks is often a low priority. IT teams are often overburdened by other business requirements and simply can't get to all of the project requests.

However, automating these manual tasks isn't as complex as you might think ...



TIP

Recognizing that manual tasks slow your operations and you're missing automation opportunities is the first step towards process improvement and transformation.

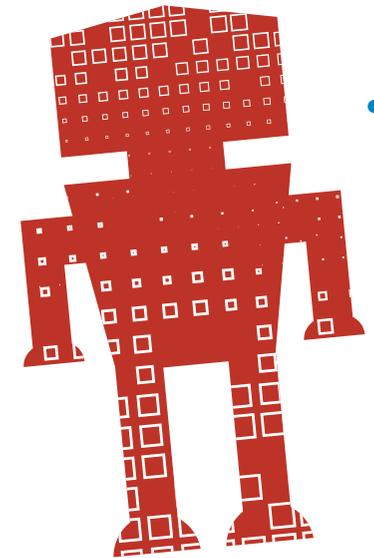
Driving Efficiencies Without Replacing Your Current Systems

RPA can automate tasks that are the exceptions in your previous process automation efforts. These tasks include looking up information, as well as copying and pasting between:

- Back office systems
- Public websites
- Web portals
- Legacy applications
- Microsoft Excel and other desktop applications
- Other data sources

RPA integrates with (rather than replaces) your existing technology, so it is both complementary to core systems and non-disruptive to your day-to-day operations. This means that you don't have to rip out your core systems or disrupt your day-to-day business. Think of RPA as a digital workforce that works side-by-side with your employees to drive process improvements.

RPA does not rely on complex integration and process re-engineering. Instead, it uses intelligent software robots to mimic human actions while applying sophisticated business rules along the way. These software robots can do all the manual and mundane tasks that are now major time-sinks for your valuable employees.



TIP

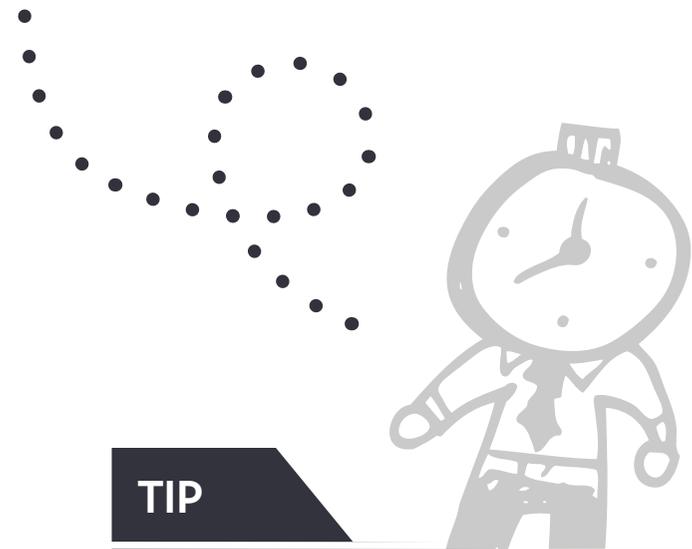
RPA augments and complements both business process management (BPM) and case management automation platforms. A diversified approach that includes software robots, human workers and BPM or case management is an ideal, forward-thinking option.

Will RPA Work in My Industry?

RPA can be used to automate manual tasks in any industry. Here's how leading organizations are using RPA to improve their operations:

- In the transportation and logistics sector, RPA can automate shipment scheduling and tracking, load researching and invoicing and credit collections
- For manufacturing, supply chain automation with RPA can dramatically reduce the time to market and simplify supplier interactions
- For banking, RPA can streamline mortgage lending processes, verification activities, customer onboarding, compliance and risk management reporting and customer service
- In the insurance industry, RPA is used to simplify claims processing and administration, new business/underwriting, policy maintenance, compliance and risk management reporting and customer service.
- For healthcare, RPA helps medical professionals and administrators to keep centralized medical records, handle admissions and verify patient eligibility and physician credentialing
- RPA can automate many finance and accounting activities, including order fulfillment, financial close, submitting vendor invoices and tracking payments

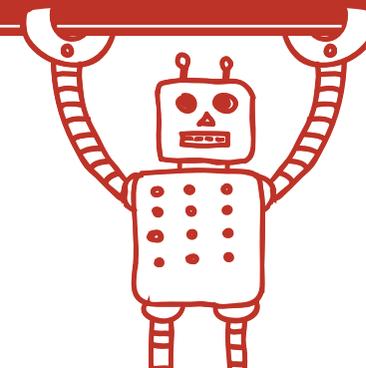
⁴Create Tomorrow, [Are You Ready for the Second Machine Age?](#)



TIP

If your staff is performing repetitive, rules-driven tasks to acquire, analyze and act on information or process a high volume of incoming information, **this points to activities that are ready for RPA.**

FACT:
A typical, rules-based process can be automated by 70-80%.⁴





Steps to Implementing RPA **Plus a Bonus Step!**

According to Forrester⁵, enterprises lack a solid approach to mine RPA value. Here are 6 steps — plus a bonus step — to building a case for RPA and integrating it into your business processes, so you can drive real value.

⁵Forrester, [Digitization Leaders Share Robotic Process Automation Best Practices](#), May 2016



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Identify Which Manual Tasks to Automate



When you look for tasks to automate, [Cognizant](#)⁶ recommends considering “the ‘long tail’ of process steps that haven’t been automated by core systems.”

TIP

Business and IT leaders should work together to understand where and how RPA can best solve manual tasks and automation challenges. For guidance, read this blog: [Are Your Processes Ready for RPA? 8 Questions to Ask](#)

These use cases are usually process workarounds that entail manual inputs to get systems ready for processing knowledge work (i.e., claims processing, audit preparation, logging customer contacts, verifications, etc.). Places to examine include:

- Areas that are underperforming, such as in customer service, or in big company initiatives such as digital transformation
- Where rigid applications are creating bottlenecks. For example, you may have a mix of systems, old and new, along with duplicative systems that have come by way of acquisitions like ERP, CRM and other core systems that don’t communicate with each other
- Processes that you can’t scale until you hire more people
- Manual, low-skill tasks that take time away from your highly skilled employees’ top projects
- Any tasks that involve copying and pasting data
- Data entry that is prone to human error
- Tasks that you are considering outsourcing but want to keep in-house

By identifying areas that require human action, you’ll determine where automation can streamline your workflows and boost productivity.

⁶ Cognizant Center for the Future of Work, [The Robot and I: How New Digital Technologies Are Making Smart People and Businesses Smarter by Automating Rote Work](#), 2015



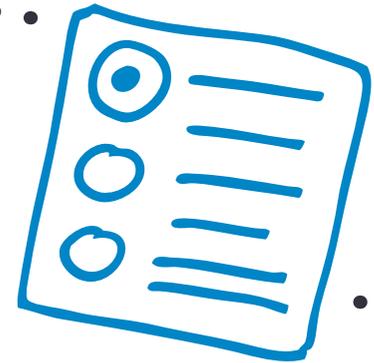
Evaluate and Select the Right RPA Vendor

RPA can make a big, immediate difference to your operations. But not all RPA solutions are created equal.

Some RPA solutions rely heavily on scraping web data from computer screens. Others rely on simple desktop recording practices that record the clicks and keystrokes of users. Both work, but only as long as website data is all you need – and those websites never change. But both are also extremely difficult to maintain and can leave you wondering, “what data did I miss?”

Use a checklist of the needed features and functionality that are critical to selecting the right RPA solution. You’ll want to be sure it meets the needed criteria in these key areas:

- ✓ Scalability
- ✓ Speed
- ✓ Reliability
- ✓ Simple
- ✓ Smart
- ✓ Flexibility
- ✓ Enterprise-grade security
- ✓ Enterprise-class
- ✓ Expandability



TIP

One misconception is that RPA requires cognitive or machine learning. Since most business processes are simple, **you can likely avoid the high costs of implementing and maintaining it.** If someone in your organization pushes for cognitive learning, ask which processes require it. Chances are it is not necessary.

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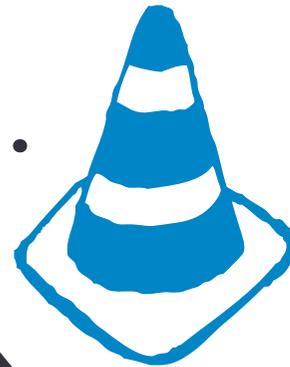
Build Executive and IT Consensus

Showing executives the value of RPA is critical to getting buy-in. Consider how RPA can help them achieve their goals.

For example, senior management is looking to improve business agility, innovate faster, improve decision-making and gain a competitive edge. They are also always concerned about costs and budgets. For IT, they are looking to improve agility to address the needs of the business quicker and tackle the projects that never seem to get addressed, shorten deployment times, decrease or eliminate touch points and help reduce desk tickets.

See the next page for a snapshot of how RPA can address the challenges and priorities of your senior management and IT leaders...

FACT:
The top three reasons businesses automate are efficiency, cost reduction and risk mitigation.⁷



TIP

Gain an understanding of senior management and IT's problems and priorities. Then, present a compelling business case that aligns with their objectives. Also **be prepared to discuss the roadblocks encountered when attempting to reconcile repetitive manual tasks** with the automated processes used in other parts of the organization.

⁷ Gartner, [How to Avoid the Five Most Common IT Automation Pitfalls](#), December 2016

Making the BUSINESS CASE for RPA

The following table summarizes the key points to begin making your business case to senior management.

Senior Management

Priorities and Challenges

- ✓ Looking to improve business agility, innovation speed, competitive edge and data-driven decision-making – ultimately to increase profitability
- ✓ Cost control and budgetary restraints are also always foremost in their mind

Business Case Benefits

- ✓ Highly attractive to upper management as a cost-effective solution for process improvement (PI)
- ✓ Increases staff productivity, service levels and capacity by 35-50%
- ✓ Delivers 25-50% in savings
- ✓ Delivers 100% accuracy in data, reducing costly errors and rework that slows operations
- ✓ Slashes processing times by up to 90% (30-50% reduction for an average process)
- ✓ ROI is typically delivered within 12 months and sometimes as soon as six months
- ✓ Knowledge workers can be redeployed to work that requires a human touch, delivering more value to the business

Making the BUSINESS CASE for RPA

The following table summarizes the key points to begin making your business case to IT.

IT

Priorities and Challenges

- ✓ Tasked with aligning their objectives with the business priorities, and delivering solutions quickly and cost-effectively
- ✓ Battling long project lists that grow longer with each passing day
- ✓ Traditional integration tools and in-house development often take months, or even years, to plan and execute
- ✓ Looking to improve agility, shorten deployment times, decrease or eliminate touch points and tickets
- ✓ Seeks to deliver precisely what the business needs; makes changes without breaking anything
- ✓ Wants to lighten the workload on their own overworked staff – and do it all at or below their budget, which seems to shrink every day

Business Case Benefits

- ✓ Can assist IT in meeting all of their objectives
- ✓ Deployment is fast; no need to rip-and-replace or re-engineer processes
- ✓ Projects can be completed in a few weeks, rather than months as no coding is needed; frees IT to work on more strategic projects
- ✓ Works with existing systems and can be implemented with minimal disruption to daily operations
- ✓ Offers numerous technical advantages, including:
 - Flexible and adaptable system
 - Visual data flow design
 - Easy access to any data source
 - Ease of use for non-technical end users
 - Minimal training needed

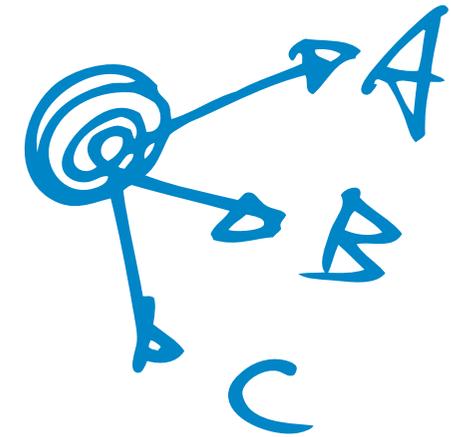
4 Design and Deploy First Use Case

Deploy your first use case led by a small team before you roll out RPA across your organization.

You can start by implementing RPA in an area that is well understood and where you believe a strong business case can be built. If you don't know which processes to automate, your provider can help you identify the best business activities for RPA.

Forrester⁸ recommends designing RPA with your experts, as they know the ins and outs of how everything works. However, these experts may not be the best beta testers. After all, you want to make sure that the average employee in your organization can use RPA.

Forrester states, "...some enterprises suggest that the normal approach of taking the most senior production staff for RPA testing may not be the best. This group is the most experienced in the current process but the most offended by the replacement of tasks they have mastered."



TIP

RPA providers can help you determine your first use case. This is a low-risk approach to evaluate **potential RPA benefits** and better understand the gaps in your current processes that you want to automate.

5 Report Success

Report on the results and success of your first use case to build interest in implementing RPA across your organization. Focusing on quick wins can help you get others on board. Show how RPA can give you a competitive advantage.

Also be prepared to address job security concerns on implementing RPA. Many employees might worry that robots will automate them out of a job. However, [Forrester](#)⁹ states that, “in some cases, RPA has led to creation of even higher-skilled positions.” According to Forrester, higher-value, knowledge-based workers are safe from redundancy at the moment.

According to this [InfoWorld article](#), IT workers may be more concerned about how implementing robotic automation will add to their workload than they are worried about someday losing their jobs to robots. Overcoming these objections is important as the impact to an IT team is actually minimal when automating business processes with RPA.



TIP

Gartner states: “Cultural resistance to automation initiatives can be fatal. The people that own the manual process must be actively engaged.”¹⁰ Be prepared to show them that automation will **enable you to take redundant and repetitive tasks off their plates - so they can focus on more interesting and rewarding work.**

⁹ Forrester, [The State of Robotic Process Automation](#), A Poor Man's Business Process Management, Or Possibly Something More, November 23, 2015

¹⁰ Gartner, [How to Avoid the Five Most Common IT Automation Pitfalls](#), December 2015

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Determine Your Full-Scale Roll Out

Once you're satisfied with your first use case, you're ready to roll out RPA across your organization.

RPA software offers ways to automate all or some stages of manual rule-based processes that were previously not automated – in a fraction of the time and cost of typical IT software deployments – while also minimizing disruptions to your operations and keeping your costs in check.

With RPA, you don't need to write code (unless you are using a less effective solution that requires programmers) or deal with application APIs in order to connect systems to your core business processes. RPA integrates with your existing systems, including legacy applications and business process management platforms. After your initial roll out succeeds, you can scale RPA to other business areas and processes.

For example, in a bank you might start by automating Know Your Customer (KYC) processes, and then later move to tackling inefficiencies within the consumer lending group. Consider how you can further leverage the power of RPA, especially in areas that require more advanced workflow orchestration.



TIP

Be sure to track and measure your process improvements to achieve maximum results.

If you lack a holistic view and metrics for your operations, it will be difficult to know if RPA is helping you meet your business objectives and to identify further opportunities to improve results.

BONUS STEP

Understand and Adopt Change Management Best Practices



“Businesses must help their employees prepare for this technological disruption by educating employees on the benefits, impacts, use and limitations of RPA.”¹¹

Most employees are resistant to change. The current way of doing things manually might be slowing your operations, but your teams are used to its pluses and minuses. The status quo becomes comfortable.

Here’s a quick [checklist](#) of 10 general best practices for managing changes to your business processes and overcoming resistance to RPA:

1. Provide early and consistent communication
2. Iron out the kinks
3. Time it right
4. Make the change desirable
5. Make the benefits relevant
6. Recruit help from within
7. Monitor the change as it’s implemented
8. Communicate the change on all levels
9. Fully integrate the change
10. Ease up the pressure

TIP

By incorporating change management best practices in your deployment of RPA, you can ease the transition for your employees while laying the foundation to harness its full power for your organization.

¹¹ PwC, [Managing the people and change aspects of implementing Robotic Process Automation \(RPA\) in the workforce](#), February 2016



The Quickest Route
to Maximizing
RPA Results



Kofax Kapow is the Fastest Robotic Process Automation Platform



The Kofax Kapow robotic process automation platform is the fastest and most efficient way to acquire, enhance, and deliver information from virtually any application or data source, including websites and portals, desktop applications, and enterprise systems, without any coding.

Kapow lets you quickly build, deploy and manage automated robots that communicate bi-directionally across internal enterprise systems, web sites, web portals, desktop applications and other data sources, without requiring APIs and complex integration coding.

Its many business benefits are increased productivity, operational efficiency and a rapid ROI, powered by non-disruptive integration and automation technology that can be quickly implemented.



Why Choose Kofax Kapow?

Kofax Kapow offers numerous unique advantages:

Simple, visual, data flow design

Leverage a visual, fully integrated development environment (IDE) for developing integration flows by simply navigating an application or data source. Built for both technical and non-technical (business analyst) users.

Access to any data source

Access web sites, portals, multiple file types (XML, CSV), Excel, calling applications via SOAP and Web Services, and internal and external applications.

Agile development environment

As new sources need to be added, integration flows can be quickly developed and deployed in a fraction of the time it would take traditional integration tools and development to deliver.

Built for the enterprise

A stateless, multi-threaded architecture enables your enterprise to easily scale deployments. Provides an enterprise-class management console for deploying and management of thousands of robots.

Built for business users

Delivers information to business groups in their preferred tool, or connects data directly to business applications and processes, giving users the information to make quick and informed decisions.



What Our Customers Say



"We expect to **save hundreds of hours/month of manual work** to process special quotes and invoices - with shorter cycle times, data accuracy and increased customer and employee satisfaction."

Wolfgang Fischer
Senior Division Manager eCommerce
Arrow Central Europe Components

"We're seeing a **95% reduction in manual effort** from our Customer Service Representatives. Kapow handles what our users were doing, automatically, more consistently and more accurately."

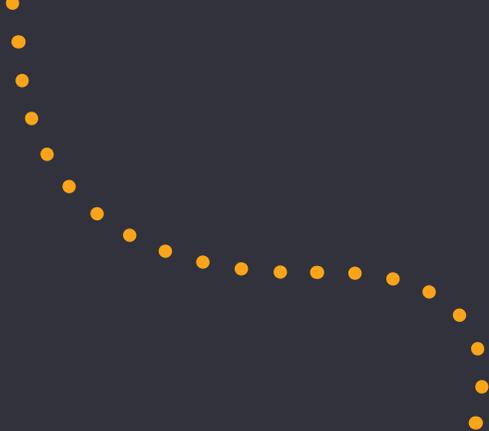
Darren Klaum
Director of Business Systems
PITT OHIO

"By implementing Kofax Kapow and streamlining some of our business processes, we have been able to **reduce the turnaround time for digitizing loan documents from 15 days to five days**. We are very excited to extend the solution into more areas of the business and explore all the possibilities that it has to offer."

Reginald L. Brown Sr.
Vice President, Electronic Imaging Manager
Consumer Lending Imaging and File Management
Union Bank

"With Lexmark solutions, we can make informed, data-driven decisions about how we manage our processes and people. The result is that **people are more accountable for the work they are doing, and can achieve more in shorter turnaround times.**"

Heather Magic
Director of Group and Individual Administration
Delta Dental of Colorado



Next Steps

Learn more on how Kofax Kapow can help you improve your operations. [Download the Kapow datasheet](#) or [request a free trial](#) now. View more RPA customer success stories [here](#).

For more information on how we can help make business as usual better for you and your customers with robotic process automation, contact us at info@kofax.com or call **1-949-727-1733**.

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Automatyzacja procesów biznesowych robotami



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