![UiPath Reboot™ Work.]

Fast Forward: Best Practices for Scaling Up Automation

Brought together by customers, for customer

The Customer Advisory Board (CAB) is a UiPath initiative to bring senior business and technology leaders from our customer organizations together with the aim of hosting mutually benefitting conversations to evolve a roadmap for driving the impact of Automation in transforming business. The experiences and views shared during the meetings have culminated into this white paper, which provides suggested guidance for decision-makers and practitioners on the journey to become a fully automated enterprise™.

Automation is widely recognized as one of the most promising innovations that saves time, money, and precious human resources while enabling accelerated digital transformation for companies. Repetitive tasks are expected to be automated and augmented with the help of artificial intelligence (AI) and machine learning (ML) integration, furthering human-machine collaboration in the future. There is, therefore, a compelling case for businesses to adopt and expand automation across functions strategically. We hope this paper helps them learn from the experience of our customers and accelerate their progress.

Contents

Adopting Automation at Scale

Automation has gone past its early stage experimentation. Organizations are now keen to scale up their automation programs and make them pervasive to transform the technological paradigm. The significant advances in automation technologies in recent years promise to provide high levels of quality, robustness, and dependability, which are valuable for sensitive, customer-related processes. Therefore, the conversations are now about how to adopt automation at scale, company-wide.

In June 2020, Mckinsey conducted a survey of 800 business executives representing a full range of industries from eight countries.

The survey revealed that the adoption of automation technologies—including robotics, autonomous vehicles, and AI-driven software that can perform processing workflows—has accelerated during the pandemic. 83% of executives surveyed in the United States and 70% in India reported faster adoption of automation.

While executives in all sectors report increased adoption of digitization and automation, those in the financial services and technology sectors have seen the greatest acceleration of such technologies since the COVID-19 outbreak. Some 88% of finance and insurance executives and 76% of information and technology executives reported increased implementation of automation and AI since the outbreak. These sectors were leaders in digitization and automation prior to the pandemic, and the coronavirus challenge made the advantage of digital payments and other machine-powered activities clear.

With vaccine inoculation at scale, COVID-19 may be a thing of the past. However, given that we cannot rule out future waves of pandemics, it is important for organizations to learn from this crisis. They must work toward making their businesses "future-proof" or "future-ready" such that they are relatively unaffected by such events in the years to come.

As part of his yearly predictions for AI and automation, Guy Kirkwood, Chief Evangelist at UiPath predicts that going into 2021, companies will begin to witness automation not only helping them save money, but also serving as a platform to create new revenue streams.

The business transformation, enabled by the initial automation efforts, can be catapulted to unlock business value, provided we look at automation company-wide. So, if you are considering scaling up your automation program, this is the most opportune time.

Mantra to Scale with Success

Scaling in the right way can help optimize the true potential of automation. Having a clear strategy and approach will speed up the journey. Hence, we decided to draw upon the insights and best practices shared by many of our customers for the benefit of other businesses.

This white paper is intended as a ready reckoner to support you through your automation journey and help businesses scale up automation.

Here are the top 10 recommendations to effectively navigate the scaling up of your automation programs: :

1. Paint an inspiring automation vision
2. Develop a robust business case
3. Get sponsorship from the top
4. Involve stakeholders from the beginning
5. Get employee buy-in
6. Invest early in building skills
7. Accelerate new use case discovery
8. Build a Federated CoE model
9. Establish the governance model
10. Take a Leveraged Approach to sustain Automation Operating Model

01 Paint an inspiring automation vision
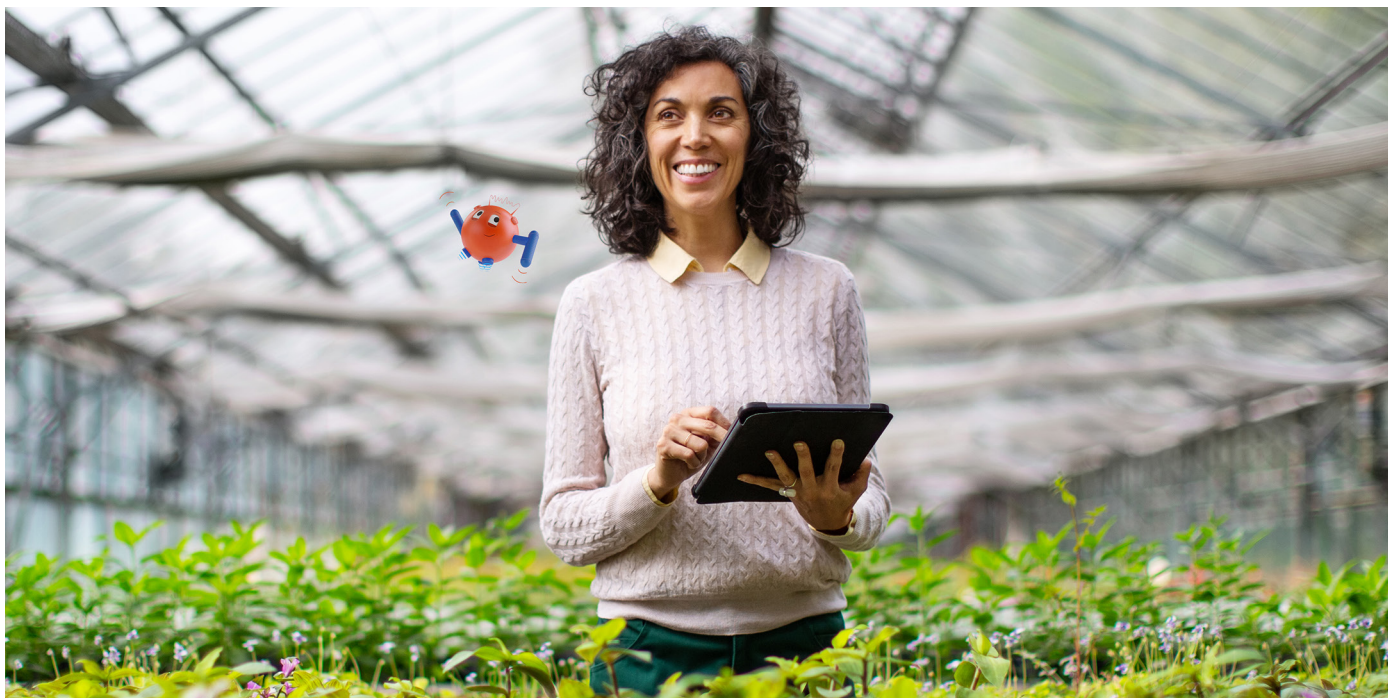
As you start scaling up multiple automation projects across your organization, there is a great opportunity to bridge various islands of automation that may have been created over a period. While technology can help consolidate those automation projects, the strategic solution lies in creating an overarching vision. Your automation strategy should set an organization-wide vision and define strategic objectives, Therefore, start by identifying your overarching goals for leveraging automation and identify the strategic areas that will benefit the most from it. It will help you navigate better in aligning the automation of disparate processes, systems, or departments. This simplifies manageability and helps meet the corporate compliance and governance structures.

The vision you define will set the tone and pave the way for the success of your automation roadmap, and make it possible for a broader set of stakeholders–even those who may not understand technical aspects–to see the value and come aboard your program. As an extension of the vision, creating an automation center of excellence (COE) is a great idea.

→ Work on defining a holistic automation vision that emerges from the intersection of business objectives and technological possibilities.

"Our next 12 months vision is around implementing composite capabilities and building maturity around automated process discovery and human in the loop, ultimately leading to hyper automation."

**Krishna Vemugunta,
Head of Enterprise Robotics Intelligent
Automation, Wells Fargo India**

02 Develop a robust business case

It is a well-known fact that all technology initiatives must have business support for the required financial and IT resources for them to be successful. Measuring ROI and positive business outcomes is critical for the health of automation as a platform and, earning the confidence of its sponsors. Showcasing these benefits and aligning them with the strategic priorities reassure the executive sponsor on the program viability and build mind-share with other senior stakeholders. This, in turn paves the way for securing funding for expansion of the automation program across SBUs.

- Set up the assessment criteria for each of the automation journeys in your scale-up plan based on the compelling objective behind it.
- Regularly assess the performance against each of the parameters to stay on course.
- Progress through a structured way of measuring the comprehensive impact of automation - justifying investments based on value creation and not just cost reduction and FTE savings.

→ Developing frameworks and templates for ROI calculation and business case justification can make it easier to operationalize the discipline across multiple functions in a geographically-spread organization.

"Our roadmap is around two tracks. The first track is to move from 2-3 department to other organizational functions where we are confident that ROI will be delivered. The second track is building capability of intelligent OCR with handwritten capabilities and exploring usability of low code in the CoE."

Anubhav Rajput,
CIO & Head Digital & Operations,
Cholamandalam MS General Insurance Company Ltd.

03 Get sponsorship from the top

Automation should be treated as a corporate priority for sustainable benefits. That is why it needs a push from the top management - the executive sponsor should be a CEO or a chief financial officer (CFO). The C-Suite's support for (and alignment with) the automation roadmap not only helps in instilling confidence, but also ensures that it remains a top priority. While individual departments/business functions will hold project-specific responsibilities and accountabilities, an overarching vision and commitment from the top sets it up for greater and sustained success of expansion.

This also forced the discipline to articulate the business impact of investment and developing a long-term roadmap at the inception stage.

→ Getting C-Suite to see early results can be easier, and their recognition of impact on business at that stage can be very helpful in achieving a broader sponsorship of a company-wide program subsequently.

"Once our intelligent automation technology solutions were implemented, our teams have become more tech savvy. This has also come with the encouragement, support, and investment in skilling from our leadership. Our operations have become more efficient and our ecosystem has become more resilient."

Sumit Srivastav,
Partner and Intelligent Automation leader,
PwC India

04   Involve stakeholders from the beginning

The journey for automation at scale can be daunting. For any automation project to be successful, you need to work in tandem with the project team, function/department heads, process owner, solutioning team, cybersecurity, compliance teams besides the top leadership.

As you move from individual to departmental to inter-departmental automation, multiple dependencies start coming into play. Cross-functional involvement beyond technology can help you create a better appreciation of your program at a broader level across the organization.

Start an early engagement and partnership with your stakeholders by mapping out who will be impacted by automation, and accordingly identify the ownership and responsibilities. Establishing clarity around the expectations from each member about the business outcome, right at the beginning, helps to build a robust future roadmap for the road ahead.

Your program will stand to gain by enlisting the support of and collaboration with the key stakeholders, who can become your automation ambassadors. The right vision and a great set of tools, when complemented with these ardent advocates, can give a fillip to your scaling up efforts.

→ **Identify stakeholders who are passionate about digital transformation and initiate early projects with them to build confidence and advocacy for your company wide program later.**

"This is an interesting debate that always comes up about: Do we bring IT along? Does IT drive the automation agenda or is it the business?

We decided very early on in Finance, as the RPA functional early adopter, to have a clearly aligned partnership with IT, forming a 'two-in-a-box approach'. This ensured we had a common set of objectives and business outcomes, thus avoiding any challenges later."

Bobby Jutley,
Senior Director - Intelligent Automation CoE,
HP Inc.

05 Get employee buy-in

This is one of the most important levers for a successful scaling up of an automation program. To achieve this, people-strategy needs to work in tandem with the scaling strategy. Once the team has secured the buy-in from senior leadership, there needs to be a comprehensive change management program focusing on creating excitement among the teams operating at the ground level. The people strategy must be woven around this in alignment with the HR Business Partners.

Most companies, while embarking on their automation journeys, focus only on the technology, but tend to ignore the people who will be impacted by it. Oftentimes, employees are afraid of robots "stealing" their jobs and thus dislike this change.

To that, the answer is simple - communicate, communicate, and communicate. Ensuring that correct and genuine messaging around the value of automation percolates down to every employee in your organization will earn you their support. Supplement it with the right training and upskilling opportunities to have your employees see the benefits of moving from manual processing to automation. Repurpose their efforts to more value-added areas of their jobs. Involve them in hackathons and ideathons to not only learn, but also contribute their ideas on which areas to automate.

Change management should be an integral part of the automation-at-scale strategy to help employees navigate through this transition. Working towards an 'automation first' mindset requires developing proactive change management strategies that are not limited to one-off tasks. Rather, there needs to be an ongoing process of navigating through the lifecycle of empowering employees – showing them where to start, who to ask for help, and how to stay involved.

Focus on fostering a culture that supports digital innovation and an automation first mindset through initiatives like Digital Garage. Make it more fun and engaging for the employees through gamification and organizing bot-a-thons/hackathons, etc., will not only serve the purpose of building automation literacy, but also improve the receptiveness among your employees. It is important to celebrate the small gains or victories that would eventually snowball into larger, positive business outcomes. Creating short videos that would inspire and excite the teams go a long way in energizing the whole organization around the initiative. Adding rewards and recognitions can further boost employee motivation and engagement levels.

"At Xerox, we are done with several basic automation, and a lot of RPA use cases are already live. With employee and user feedback and successful smaller pilots, we would now like to scale to a level where we can start transforming bigger and complex business processes."

Shivani Agarwal,
Director - Process Automation,
Xerox Corporation

06 Invest early in building skills

Scaling automation requires that organizations develop both capability and capacity and keep up with the rapid technological progress of emerging cognitive technologies around AI/ML.

This needs an acute focus on skilling. The best time to start is 'NOW'. So, begin the journey right away: provide opportunities for training, certifications, and participation in industry forums to keep your employees' knowledge on automation as a platform, updated. It is a great idea to leverage the training academy and certification resources provided by your platform vendor, many of which are available free of cost. For example, UiPath Academy and Partner Portal are replete with great resources.

Take the resource building broader by democratizing automation through citizen-led development initiatives. This empowers a large employee base to help drive the automation agenda, which is a great way of quickly scaling automation with a wider skilled resource pool.

→ Need for risk controls becomes important as you move into the territory of citizen-led innovation. Integrate the controls within your citizen-led development model at the design stage itself instead of waiting to do it later during implementation.

"Upskilling and reskilling, a win-win strategy for individuals and organisations. It is one of the primary methods today, for people to kickstart a career in Automation, and a great method for organizations x`1to engage and retain talent."

Vinay Ghule,
Senior Technology Leader,
Principal Financial Group

07   Accelerate new use case discovery

The ability to discover new use cases is one of the most crucial building blocks for creating the momentum for automation across functions. Once the low-hanging fruits with quick wins are covered, choosing the next automation destination correctly defines the path forward to a successful ramp-up and scaling of an automation program enterprise-wide.

At this crucial juncture, it is vital to identify and prioritize the right processes that make for a good business case. A good starting point can be to identify end-to-end user journeys that are particularly important to your stakeholders and then look for automation opportunities that exist throughout the value chain. A mix of top-down and bottom-up approach will work well.

→ Leverage citizen developers to help find the gaps and identify both small and large opportunities for automation within your organization – this can provide you more hands at work to scale faster. When you open the doors for citizen-led development, employees help identify the areas that can make them become more efficient, and step forward to embrace the opportunity to reinvent their work.

Top-down automation discovery:

- Driven by specialized teams
- Backed by tools such as process mining, task mining approaches like Lean RPA
- Focused on inter-departmental and/or complex processes
- Building full automation roadmaps per department

Bottom-up automation discovery:

- Driven by individual workers and citizen developers
- Backed by tools such as Automation Hub and Task Capture
- Focused on tasks and simple departmental processes
- Provide a steady stream of automation opportunities

"Our RPA journey started in 2019 and has been transformative. It can be seen in our 24/7 back office operations, doorstep service, and advanced remote working facilities that helped run operations in this pandemic. Each deployment led to discovering new processes and business cases across functions that could be automated."

Rizvi Kareem,
Head of IT,
Citizens Development Business Finance PLC

08 Build a Federated CoE model

As briefly discussed above, setting up a center of excellence (COE) where the expertise resides, can help operationalize the vision of scale more effectively. An automation CoE should broadly look at driving the enterprise automation strategy, technology solutions, governance, people skills, and operating models, while the individual business units or functions (the spokes) are responsible for identifying and assessing opportunities and developing and maintaining bots. Having a CoE is the best way to handle governance and risk controls, train resources, provide best practices, collaterals, reusable assets, etc. Individual business units or functions (the spokes) are responsible for identifying and assessing opportunities and developing and maintaining bots. The model combines the benefits of decentralized bot-development with centralized governance. This helps in scaling up automation across the enterprise, while ensuring an end-to-end view.

A federated CoE model can help leverage talent and subject matter expertise across the organization, identify automation opportunities, agile development, efficient resource usage, sharing of automation capabilities and best practices, and standardization. All of this will lead to greater business impact and rapid scaling of automation.

→ Leverage the CoE as a driver for innovation around automation through the integration of cognitive capabilities and other new technologies like AI, ML, etc., as well as automation of advanced processes. It will not only bring about innovation faster, but also help in exploring a wider area of newer use cases for automation. Consider anchoring it in the IT department because there is a close interlink with IT and given that the IT function already collaborates across different business functions.

"We have set up an RPA CoE in India. Currently we are increasing capacity to scale up automation and promote to other regions.

While scaling up RPA automation, our emphasis is around error handling and exception management processes for seamless business operations. Our focus is to integrate OCR, cognitive capabilities and RPA together in other areas of business operations."

**Shobha Singh,
Head Digital Transformation,
Mizuho Bank**

09 Establish the governance model

A PwC survey from 2018 revealed that only about 54% of company executives were confident in their ability to manage risks associated with RPA and intelligent process automation.

To sustain and scale the automation initiatives, there needs to be a very clear focus on the governance framework. Even if you are just experimenting with some pilots, begin addressing the issue of governance at an early stage so that you do not have to apply brakes on your ambitions later.

Partner early with IT and the CISO, as well as establish risk and compliance governance with the internal audit/compliance teams. Align your roadmap on governance and controls with all relevant stakeholders to create a well-documented governance structure, overseen by a steering group for adherence.

→ Governance can be tedious and time-consuming, especially under the current circumstances where real-time response is expected by businesses. But this will go a long way in ensuring success for the long haul. Opening clear channels of communication and co-creation with key stakeholders can also help avoid this.

"Automation is a journey. With every solution that is rolled out, we need to ensure that business and IT roadmaps are aligned, and address risk mitigation and compliance measures."

Sekar S,
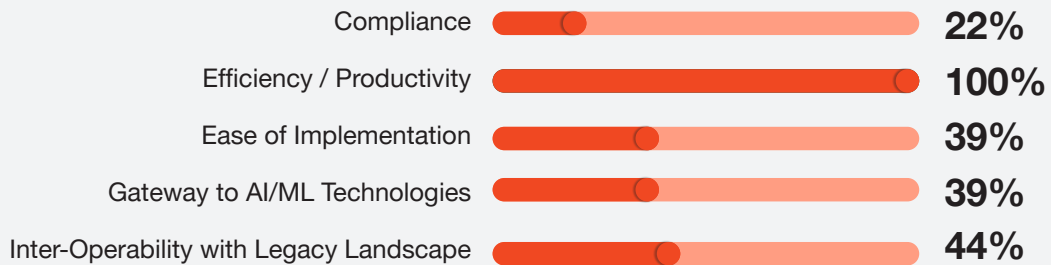General Manager - IT & Chief Information Officer,
The Karur Vysya Bank Ltd

10 Take a Leveraged Approach to sustain Automation Operating Model

As you move towards a cross- organization model and even collaborating across organizational boundaries, it can be useful to leverage strong partners. They can bring capability in specific functional and industry-related domains to add to your strategy and capacity. This can help expand your footprint without direct investment and also save lead time required to create the new talent pool. This can accelerate the progress as well as provide agility in responding to sudden escalation in demands or cutbacks inherent in an uncertain business and geopolitical environment today.
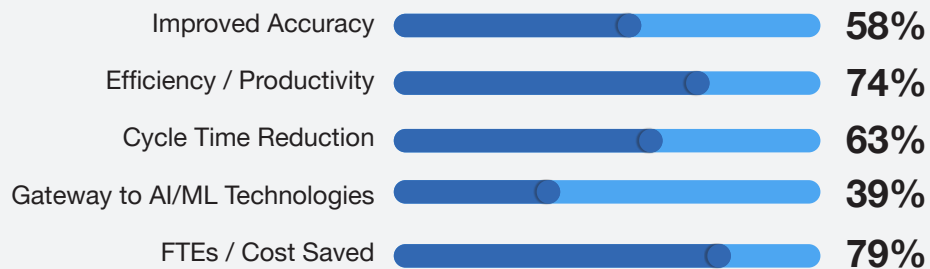
Poll

Poll 1: What is the primary driver for your adoption?

Compliance	22%
Efficiency / Productivity	100%
Ease of Implementation	39%
Gateway to AI/ML Technologies	39%
Inter-Operability with Legacy Landscape	44%

Poll 2: What business metrics do you use to measure success of your program?

Improved Accuracy	58%
Efficiency / Productivity	74%
Cycle Time Reduction	63%
Gateway to AI/ML Technologies	39%
FTEs / Cost Saved	79%

Poll 3: What has been Impact of COVID-19 on your adoption and automation?

Put on Hold	0%
Has Reduced	6%
Got Attention of Upper Management	6%
No Impact	22%
Has Increased / Accelerated	67%
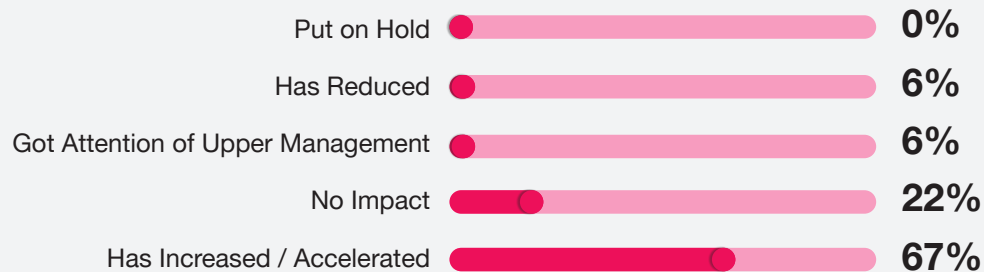
Poll 4: What product or functionalities are important for growing adoption in your enterprise?

Document Understanding	53%
Apps / Low Code	63%
Cloud	21%
Process Discovery	58%
AI/ML Enhancements	68%
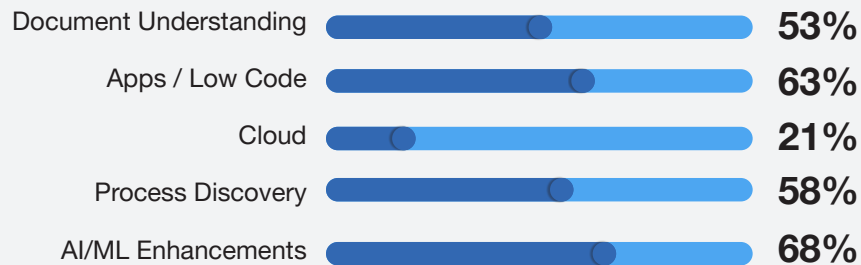
Poll 5: What is the current phase of Automation in your organization.

Task Level – Initial Adoption Stage	19%
Horizontal Processes within a Department	38%
Cognitive Automation (AI/ML Integration)	38%
Enterprise-wide Automation	44%
Vertical / Core Business Processes (Industry Specific)	63%
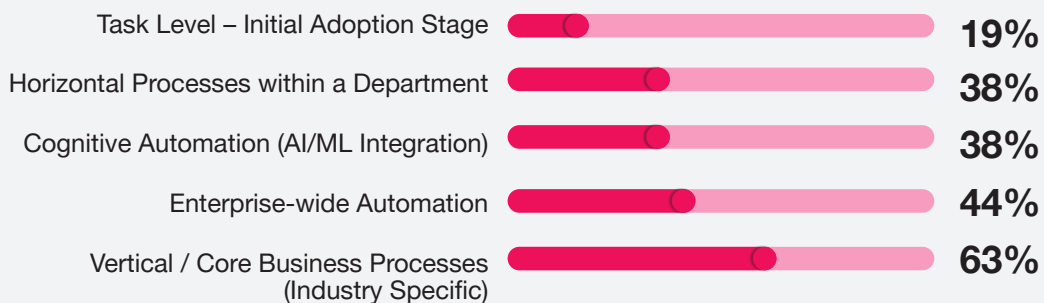
Poll 6: What have been your challenges / roadblocks in moving to the next phase in automation journey?

Ability to showcase benefits to management	29%
Technical complexity / Long time value	29%
Employee resistance	35%
Availability of right capability / capacity in partners	47%
Ability to discover new use cases	53%

Poll 7: Which are critical elements of your 12-month vision for Automation?

#Processes of automated	50%
# of hours/FTE's Save	57%
Centralized automation strategy or CoE	29%
Error reduction	14%
#of verticals touched by automation	21%
Companywide digital transformation	50%
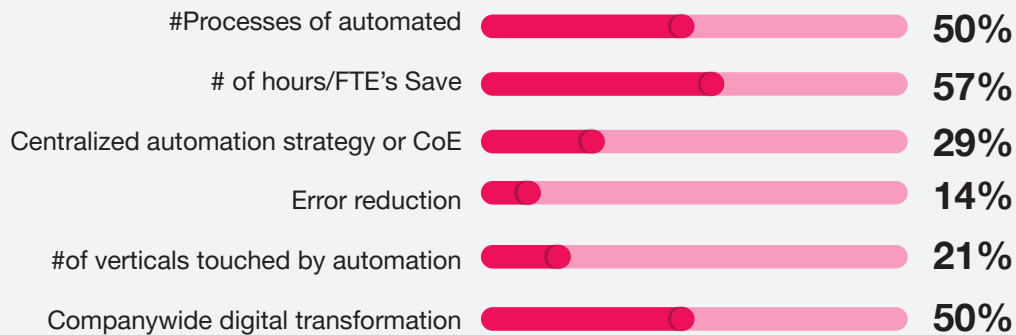
Poll 8: How can UiPath help you advance to the next phase of your journey?

Building a business case	23%
Help build roadmap for scaling	69%
Process Delivery	46%
Overseeing development	15%
Measuring success/KPIs	31%
Learning sessions on New Technologies	62%
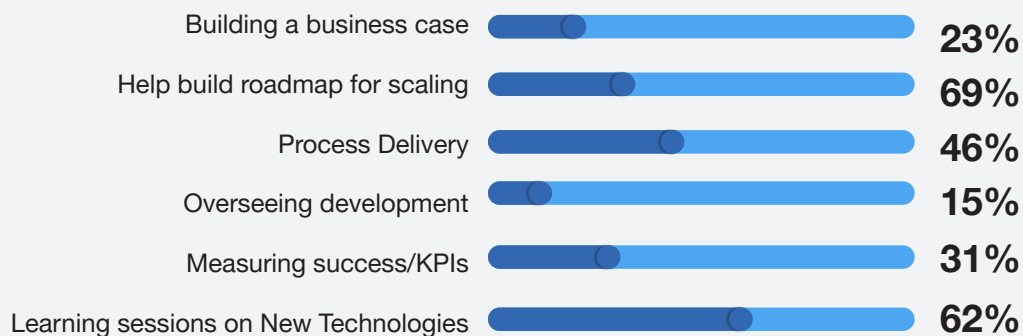
Poll 9: Will you be open to join a workgroup to co-create an action plan?

Yes	100%
No	0%

Why UiPath?

UiPath has been named a Leader in The Forrester Wave™ Robotic Process Automation, Q1 2021 with the highest rankings in the Strategy, Market Presence, and Current Offering categories, of all evaluated robotic process automation (RPA) vendors.

The ability of automation to help humans remove the mundane parts of their jobs has led to significant growth in the past few years. UiPath has a vision to deliver the **fully automated enterprise™**, one where companies think '**automation first**' and apply automation where it makes the most sense and can have the greatest impact.

We believe that automation as a boardroom priority shouldn't be new or surprising anymore. Now the race is on towards a greater vision for automation's role across the entire enterprise: scaling and scope extension. UiPath offers an **end-to-end platform for automation**, combining the leading RPA solution with a full suite of capabilities that enable every organization to rapidly scale digital business operations.

The world is changing every day and we're proud to continue to change with it while also maximizing the value automation and AI can bring to our customers all around the world. We are focusing on empowering every company to become a fully automated enterprise—unlocking unlimited potential—but that's just one of the many things in store for UiPath. We hope you'll join us every step along the way.

To find out more about UiPath, visit uipath.com