



# The Skeptic's Guide to Intelligent Automation



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# Introduction

## What is Intelligent Automation?

A relatively new term that has been made popular by Robotic Process Automation, Intelligent Automation brings together multiple automation technologies to automate a process. It's supported by AI/ML to provide a more effective solution.

IA has encouraged the re-emergence of technologies that have been around for decades, like workflow management, OCR, analytics, etc. More importantly, the word "intelligent" highlights the advent of AI/ML in these technologies to solve seemingly unsolvable problems.

So now with IA one can understand incoming data whether it is structured or unstructured from multiple sources – email, images, voice, SMS/text, video or chat – and extract meaningful information from it. One can then orchestrate the process workflow that now comprises of human workers and digital workers to act on the extracted information. Furthermore, one can now make increasingly complex decisions using complex business rules engines or decisioning systems powered by machine learning to reduce exceptions.



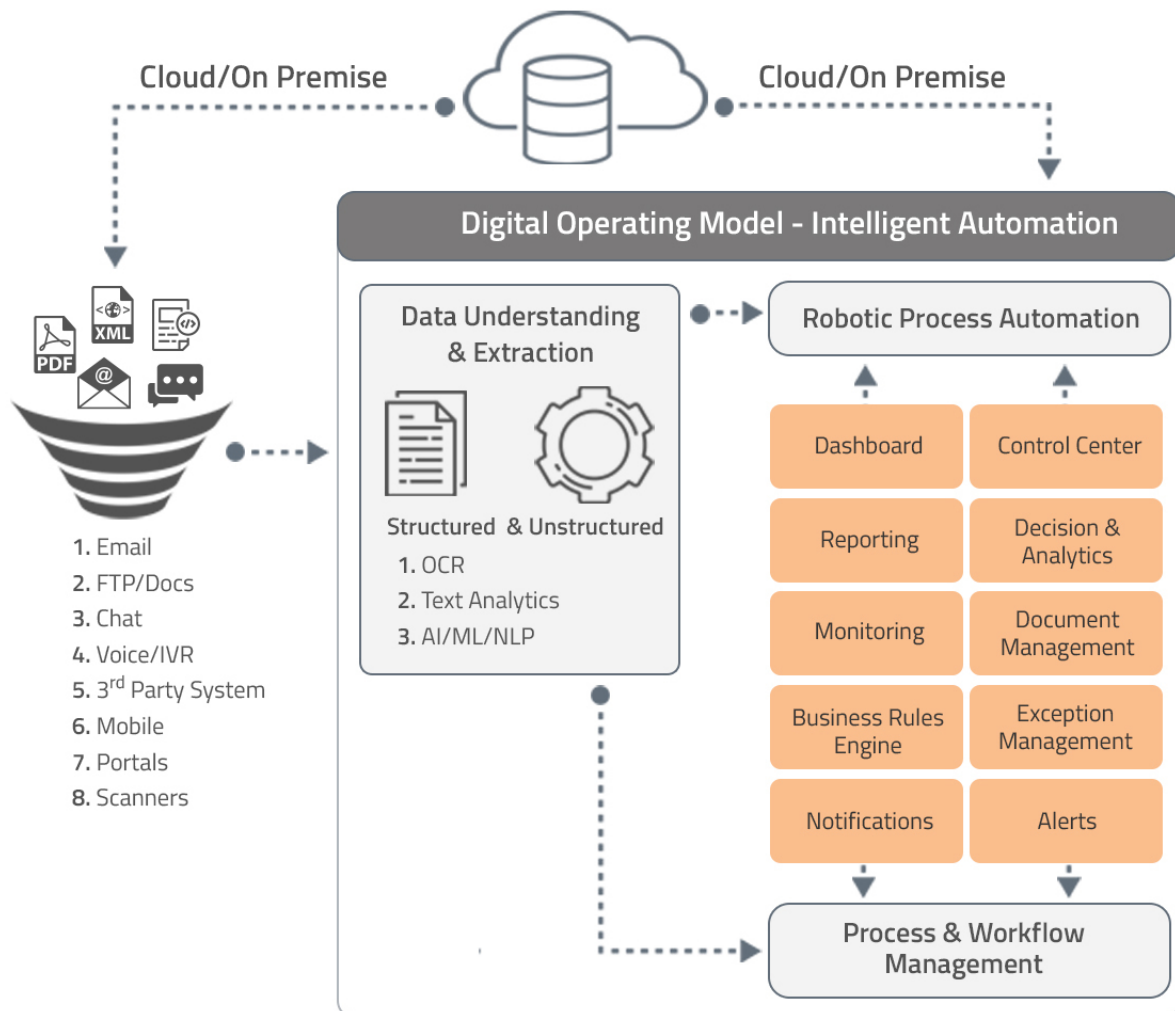
## Do you need Intelligent Automation?

The contents of this eBook are structured in such a way that we will not only answer this question but also tell you how to go about establishing an Intelligent Automation Program.

- Signs that you need IA
- How Intelligent Automation Improves Efficiency and Productivity of your Operations Team
- How to Design your Intelligent Automation Journey
- Do's and Don't of Intelligent Automation

The below diagram provides a pictorial representation of what an Intelligent Automation framework looks like from our perspective. We also refer to it as Digital Operating Model.

## Intelligent Automation Framework



The four major components of IA, as shown in the framework above, can work independently or together to accomplish the following automation objectives:

**01**

**Data Comprehension and Extraction:**

*The data can come from various channels and in multiple formats. The first step is to understand and extract this incoming data using OCR (digitize), Natural Language Processing, templates (structured data) or text analytics.*

**02**

**Robotic Process Automation (RPA):**

*Once the data is understood and extracted it must be acted upon by entering it into applications, performing data manipulation/enhancement, approving based on preset rules or sending it to external systems. RPA can be used to accomplish this task, if the actions are structured and rules based.*

**03**

**Workflow or BPM:**

*If the work must be orchestrated or needs human involvement, a workflow/BPM tool must be used to orchestrate both Digital Workers and Human Workers. A workflow tool also increases visibility across the process and helps you manage & optimize the process.*

**04**

**Artificial Intelligence (AI) or Machine Learning (ML):**

*This aspect is embedded at various places – data extraction, decisioning systems, pattern recognition, Chatbots, text/voice/vision channels for data initiation etc. AI helps reduce exceptions and increase the level of automation across your processes.*

Chapter 1

**Signs that you really need an Intelligent Automation solution**

**Case 1**

**A large bank (Lateetud customer) had a team of eight employees managing a central email box. They had to read the emails and attachments to categorize them for further processing. With high attrition in the team, the process was error prone and very costly to continue. Can Intelligent Automation help?**

As the enterprise workplace continues to become increasingly digital, opportunities for Intelligent Automation pop up every day. In this section, we highlight major signals that should prompt you to start thinking about Intelligent Automation as a potential solution to reign in your operations.

More than 40% of enterprises will create state-of-the-art digital workers by combining AI with Robotic Process Automation (RPA). The RPA market will reach \$1.7 billion in 2019 and \$2.9 billion in 2021.

According to a study from Deloitte, 2019 saw a doubling in the number of companies applying intelligent automation — that’s technologies such as robotics process automation, natural language processing and AI. The report also found that executives expect intelligent automation to increase workforce capacity by **30%**. Delve deeper into the report, and it states that 2020 will be a breakout year for intelligent automation.



## What are these signs?

### 01 Large Number of Exceptions

You have already automated processes using RPA but you are seeing a lot of exceptions. There could be several reasons for this: the data is very unstructured, the incoming data is in a format (voice, SMS, scanned images etc.) your systems do not understand, the activity involves applying complex rules or human judgement or there is lot of variability in your data.

### 02 Lack of End-to-End Visibility

You may have automated in parts and pieces (RPA, OCR etc.) but there is nothing bringing it all together. This means you do not have end-to-end visibility of your processes and there is no orchestration layer that ties it together and provides the necessary metrics to evaluate the progress of your operations team. Your customers or vendors do not have visibility of their processes or information, and you are not able to provide this to them because the systems or applications do not talk to each other.

### 03 Lack of Scalability

As you plan to grow your operations to keep up with customer acquisition goals, you realize that the only way to grow is to add people, resulting in a linear cost model. Inevitably, you realize it is very time consuming to hire, train and retain these resources and that you are already becoming a bottleneck.

### 04 Lot of Manual Work

Your operations floor is full of people glued to multiple screens doing swivel chair activities – transferring data from one screen to another. You notice a lot of errors and quality issues. Your internal and external customers are unhappy, your employees are unhappy (because the work is so manual) and the result is attrition. You also notice papers being scanned, printed and re-scanned at various stages. All of these are telltale signs that you need intelligent automation.

### 05 There is No Single Source of Information

You notice that you must go to multiple sources – emails, file locations, spreadsheets and multiple software applications – to collect or compare data. You realize that the information that should be available at click of a button is so spread out that you give up or postpone collecting this information for a later date.

### 06 Why Not? If Not You, Who?

Your pain points are not addressed by your IT group, and instead become part of portfolio management, which relegates you to a corner because the organization is working on other high priority items (in partnership with one of the big-5 consulting firms.) You realize you need to control your destiny now and, in light of the citizen developer revolution, you have an opportunity to setup your own automation practice that owns RPA, Data Extraction, Workflow and Decisioning Systems. You think it is time to act. Why not? If not you then who?



## Case 2

**A large financial services firm faced a challenge of managing loads of incoming paper in this increasingly digital landscape. They had to manage customer expectations and, more importantly, they were worried about how to grow and scale their operations. They decided to implement Document Capture (scanning and OCR), Enterprise Content Management (ECM), RPA and workflow to automate their archaic processes.**

## Chapter 2

# How intelligent automation improves efficiency and productivity of your team

### Case 1

**Annual benefits fair management is a big undertaking for any insurance company, requiring coordination with customers, internal stakeholders and vendors to deliver a positive experience to their end customers. Lateetud used Intelligent Automation components to combine workflow, text analytics and RPA to reduce the effort by 5 FTE and deliver a better, fully managed experience to the end customers. Now the insurance company can handle more benefit fairs and deliver faster results with the same team.**

#### Extend Capabilities of our Software Robots

Today, robots can do more with Intelligent Automation. They can better understand data because of OCR/NLP or AI/ML-powered data extraction tools more easily work hand-in-hand with human workers with the help of workflow orchestration and make better or more qualified decisions because of AI/ML powered decisioning systems. Now, they can meaningfully interact with humans via chatbot, intelligent IVR or email. In summary you can now automate more – the cases that were exceptions can now become part of the scope.

#### Effectively Use Off-Hours

An Intelligent Automation system works around the clock, so now you can perform work items during off-hours. And when employees arrive in the office during the normal business hours, they more easily manage exceptions – even these exceptions you have reduced by extending capabilities of your software robots using Intelligent Automation.

#### Spend More Time Building Relationships

Now that more cases are automated, you can spend more time talking to your customers and building relationships with them, rather than spending time doing manual activities that do not add value.

#### Increase Visibility Across the Processes

You now have more visibility because all of your people (digital or human), processes and technology are being orchestrated. This means you have complete end-to-end visibility of what is happening. If there are exceptions, you know how many exceptions and why (and who) is handling the exceptions at any given point in time. More importantly, you know where the bottlenecks are and the impact of them. Also, your customers and vendors have more information about their orders, support requests or invoices.

#### Scale Faster – Do More with Less

Now that your entire process has been automated to the maximum, you can do more with less. Whether it is seasonal spike or growth, you can handle both with relative ease.

#### Grow and Grow More

Now that your cost centers are automated to the maximum extent, you can divert your attention and money to acquire new markets. You know that you can handle more business at a lower cost-per-unit. Your cost is no longer linear. You have arrived!

**Case 2**

A leading bank (Lateetud customer) saved \$6 million in FTE savings in the last three years from RPA alone. To realize further revenue optimization, they are implementing workflow and data extraction and integrating that with RPA. What can you do with \$6 million more?

According to a McKinsey report,  45% of current paid activities can be automated by today's technology, an equivalent of \$2 trillion in total annual wages.

Deloitte Global #RPA Survey finds that RPA has improved compliance **(92%)**, Quality/accuracy **(90%)**, productivity **(86%)**, cost reduction **(59%)** across industries.



Chapter 3

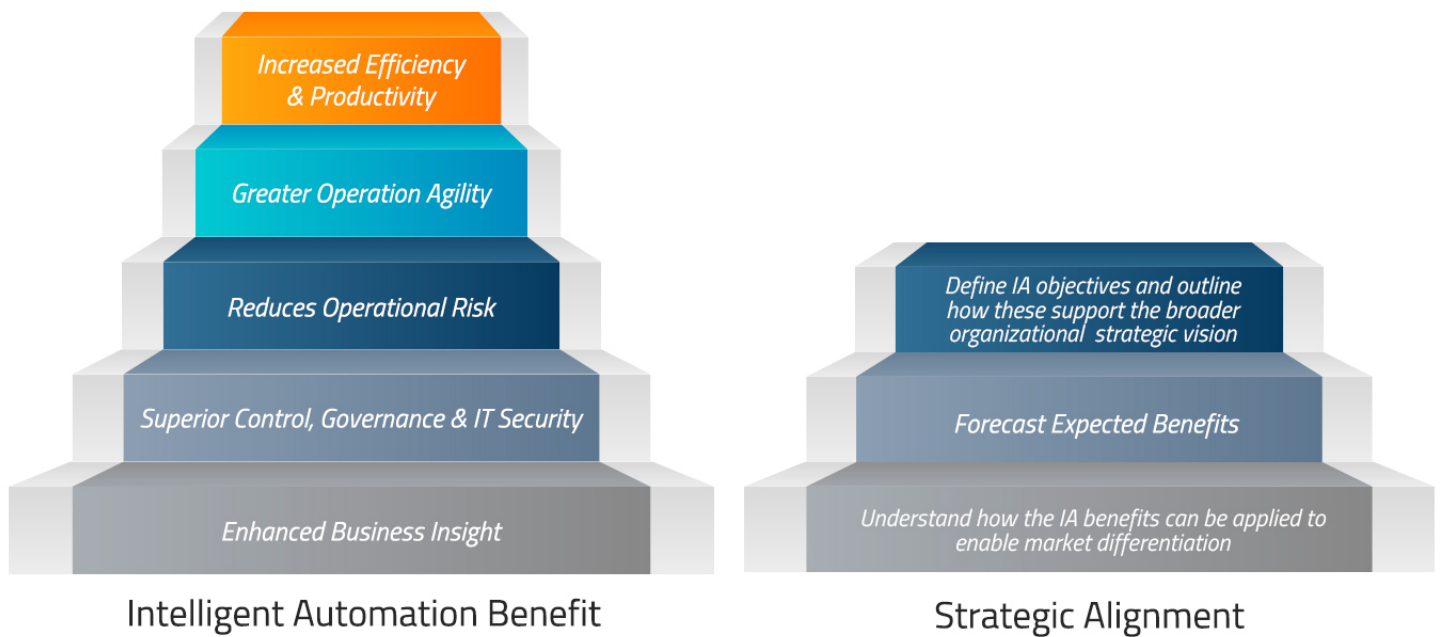
## How to Craft an Intelligent Automation Strategy

You realize that it is time to take control embark on the Intelligent Automation journey. Achieving success means going beyond choosing the right technology – you need to have the right plan. This section outlines seven pillars (also steps) to create a successful Digital Operating Model necessary for Intelligent Automation.

### *Pillar 1: Vision*

It is critical to define what the vision of your process automation program is going to be and how it aligns with your business objectives. It is important that the vision is good enough to drive the entire organization, but clear enough that understands it and is able to relate to the context in which they are working. You could also engage a third-party vendor to perform an unbiased strategic evaluation of the broad potential of automation and the expected benefits at a high level for each of the organizations or departments within an organization. This analysis is different from a process assessment exercise.

## Vision v/s Strategic Alignment



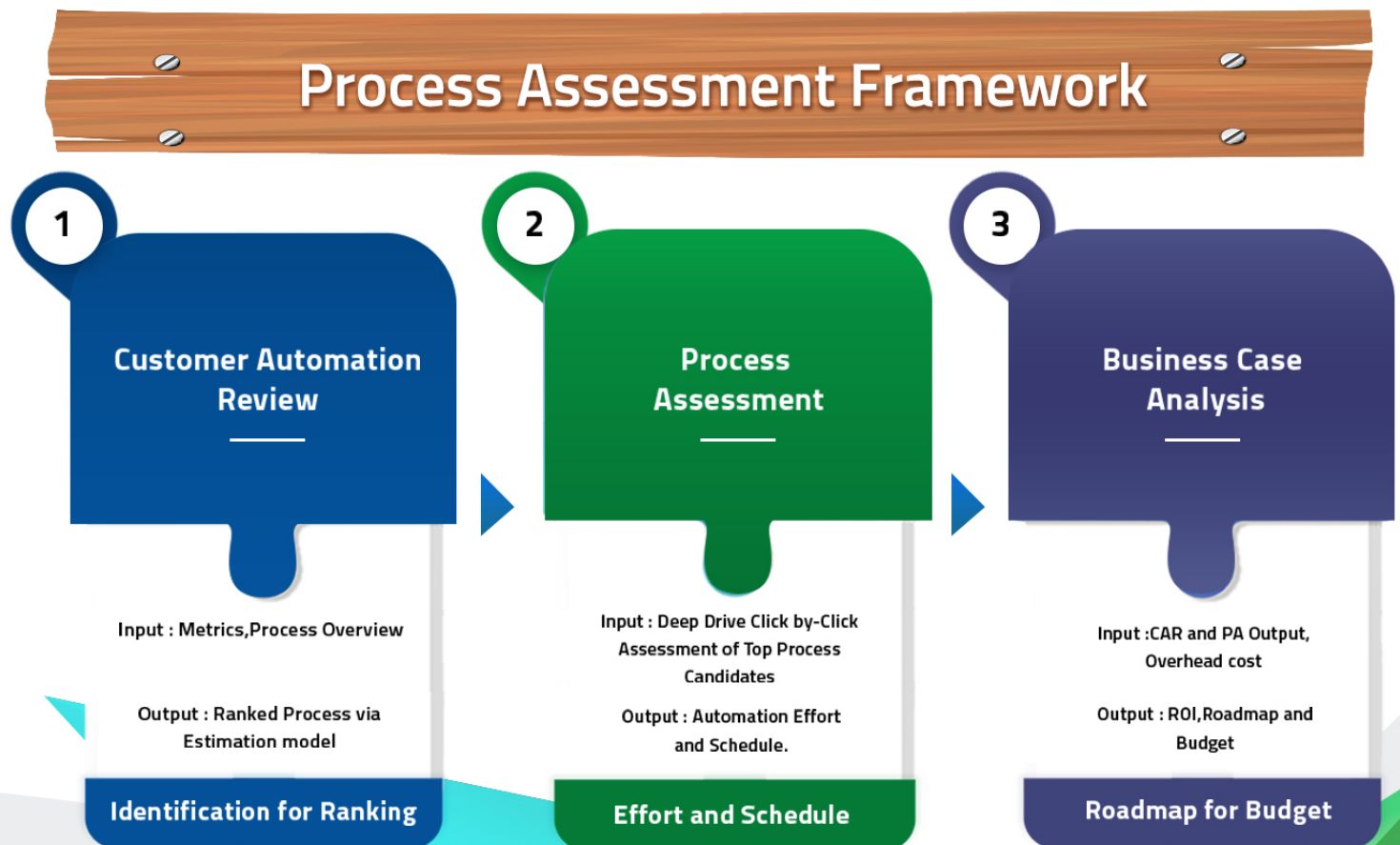
**Pillar 2: Organization**

Define the organizational design that best supports delivery of the Intelligent Automation capability and aligns with corporate strategy and culture. As this is a strategic initiative, ask yourself: where does it sit, who does it report to and what leverage would it have? It is also important to define the structure of this organization, which includes identifying roles, like Head of Automation, Service/Support, Release Management and Enterprise Architect, among others. You also must decide the structure of your IA COE – is it going to be centralized, federated or hybrid? It may start as one but evolve into another as you grow the COE.

**Pillar 3: Governance and Pipeline**

One of the top three reasons why organizations fail in scaling their automation initiatives is choosing wrong processes or not knowing what processes to choose to get the maximum benefits. Organizations should adopt a comprehensive, objective and structured methodology to identify the right processes. If one does not approach it in a structured manner then there is high risk of automating processes that do not provide the right benefits or even worse is that one may find a little later in the development cycle that the process cannot be automated for some reason. This then leads to loss of confidence in the technology across the organization.

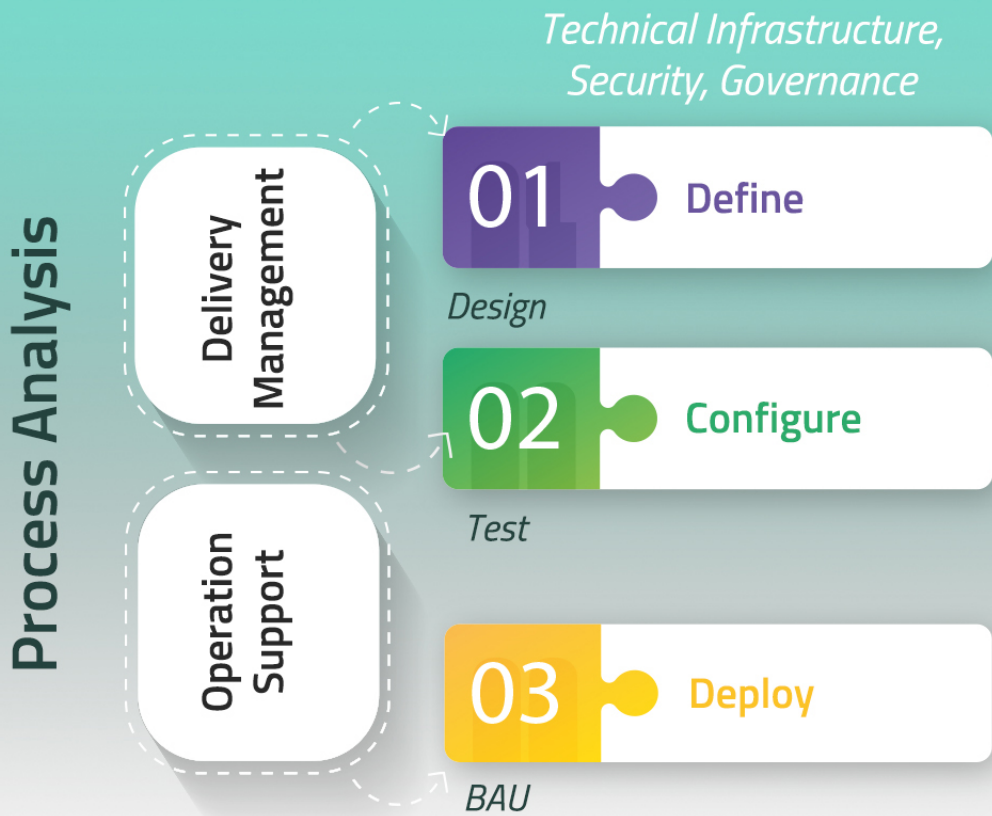
Lateetud uses the below framework supported by software and tools to assess processes.



**Pillar 4: Delivery Methodology**

As you start developing the automations, you need to have a clear methodology of how you intend to deliver the automations to production, and ensure the methodology aligns with your internal standards. Consider taking a more agile approach to delivery, compared to a water-fall approach. Agree on the delivery approach and embed the templates and policies in your existing change management methodologies. Lastly, define the delivery management and tracking approach that ensures optimal usage of the defined technology.

# Delivery Methodology

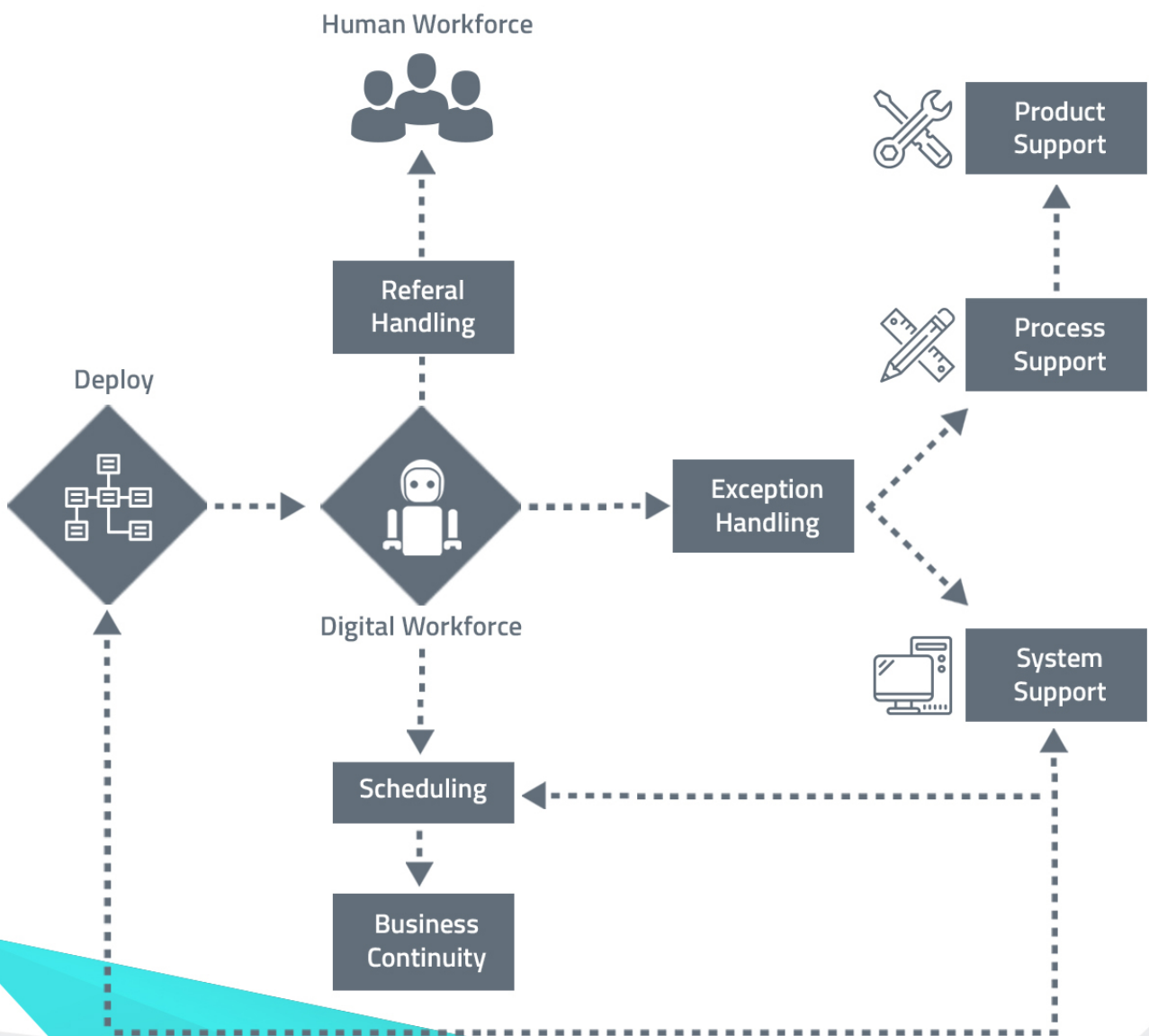


**Pillar 5: Service Model**

How do you support your operational processes? Once you answer this question, create a service model to support those objectives. This will include management, reporting, scheduling system support, product support and referral/exception handling processes for business-as-usual.

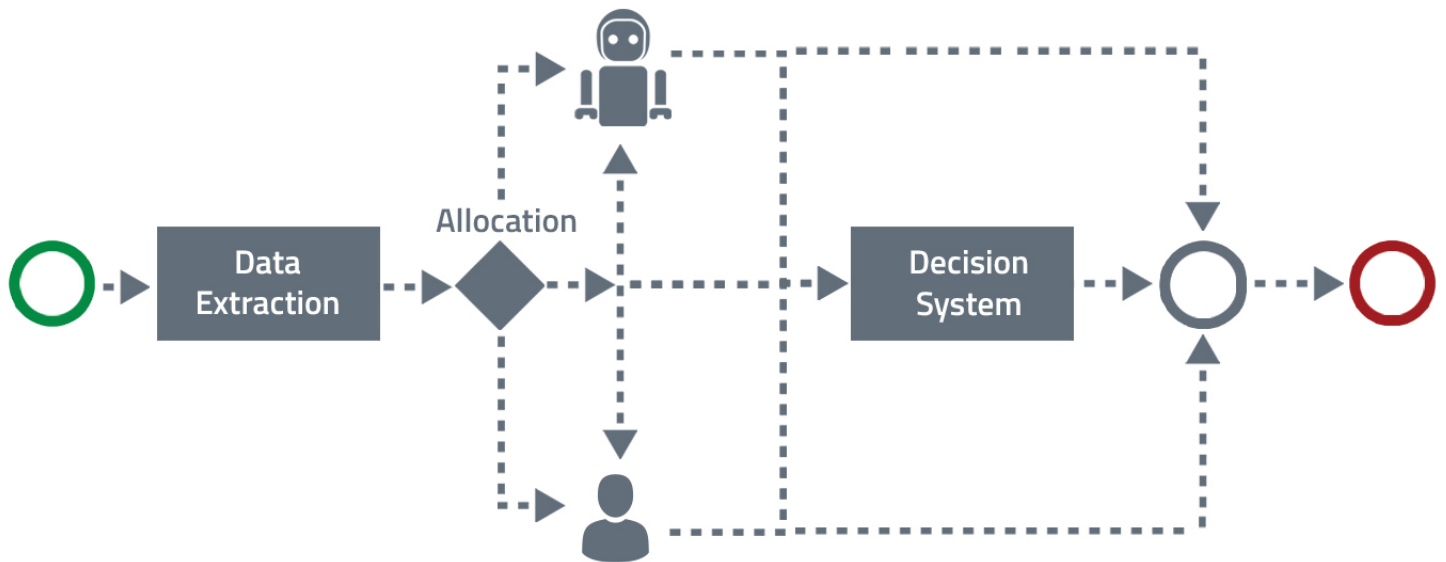
In general, the service model could look like the one below and can be customized further for organization specific needs.

# Service Model



This is an area where workflow orchestration comes in quite handy, as it brings together all the technologies and helps you to monitor and manage them for BAU and continuous optimization.

## Workflow Orchestration



*End-to-End Management and Monitoring Workflow Tool (BPM)*

***Pillar 6: People***

This pillar defines what roles you need to setup in your organization responsibilities for each of the roles and the process of selecting the right candidates to fulfill these functions. You also need to establish training and enablement programs. These will ensure that the resources are properly trained to own the technologies that are included in your Intelligent Automation ecosystem. It should be done in a phased manner and should be aligned with your implementation approach or define process priority.

Lateetud recommends a three-tiered and three-phased approach of prioritizing processes for Intelligent Automation and enabling employees accordingly.

***Pillar 7: Technology***

Technology is a significant pillar. You need to partner with your IT organization to define how the technology components will be architected, to ensure scalability and optimum performance. Technology must align with security and compliance requirements, including access credentials, hosting (cloud or on-premise), support, upgrades, integration with internal applications, communication or data exchange, API policies etc.



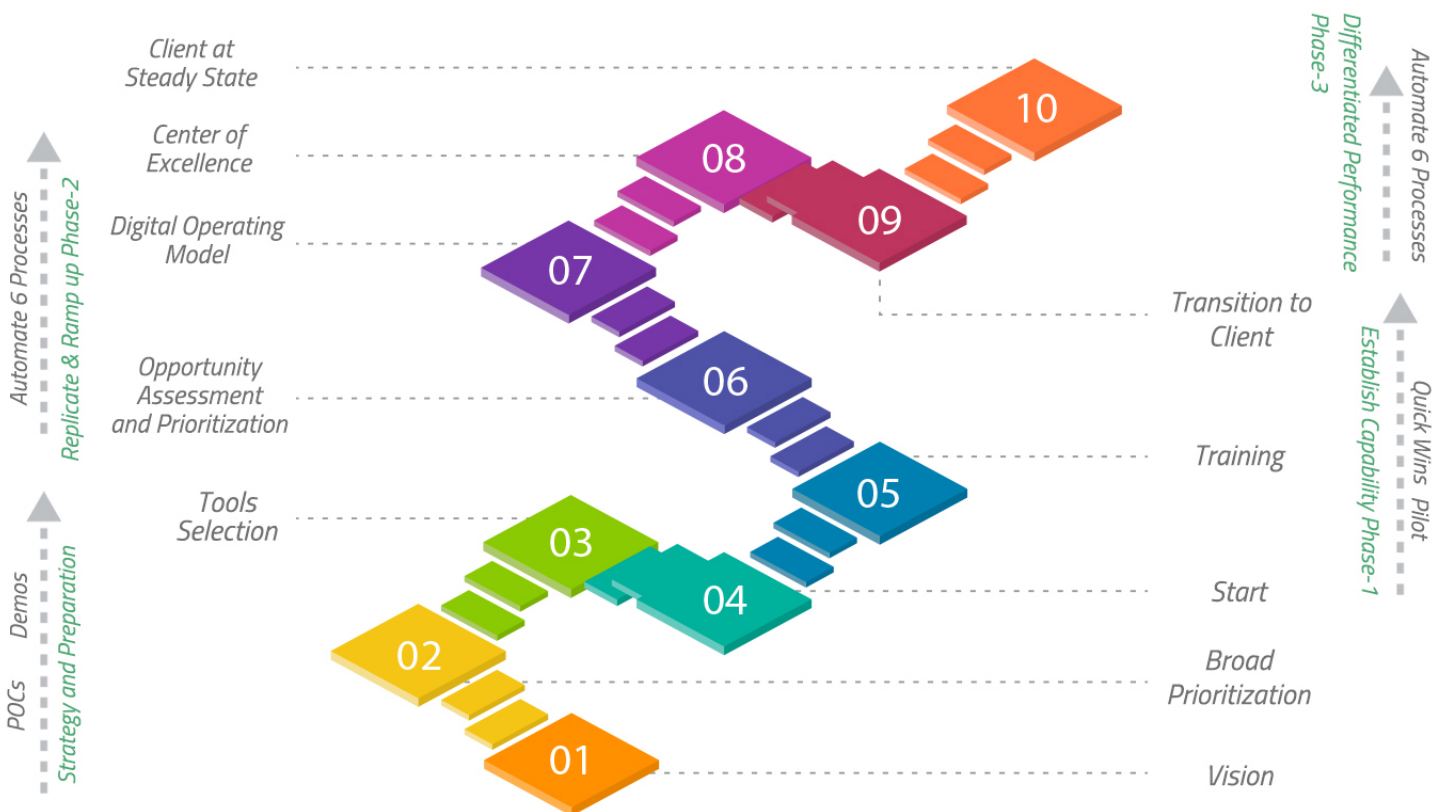
Chapter 4

**What does a typical timeline look like?**

The digital operating model doesn't have to be established on day one but typically gets established in a phased manner over 12 to 18 months.

A typical journey is indicated below.

*Intelligent Automation*



At this stage, you may be wondering what categories of Intelligent Automation technologies are there and how we do phase them in your implementation timeline?

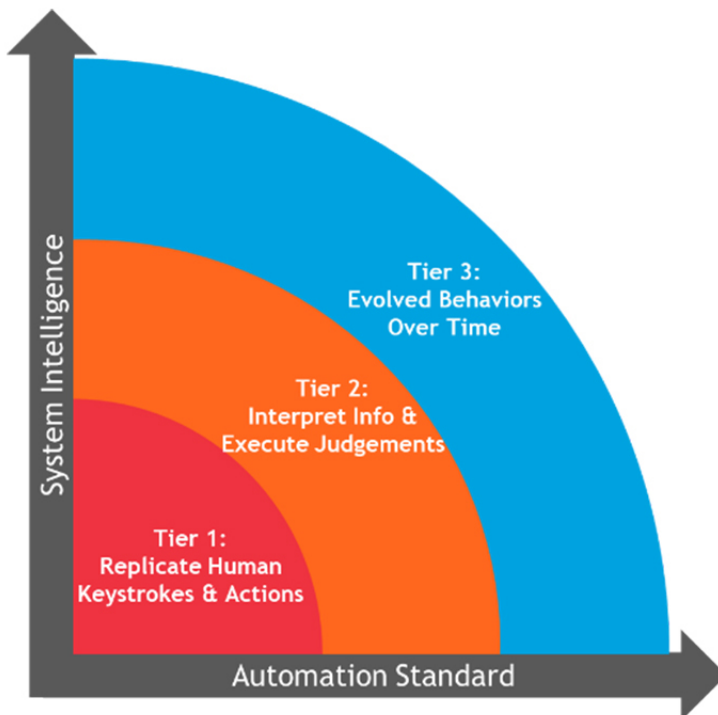
Lateetud recommends a three-tiered execution, mapped to the three-phases indicated above in the timeline. The tiers are based on the complexity of the processes and maturity of the COE organization.

- **Tier 1: Simple Structured Processes.** This would include RPA, OCR and simple workflows (BPM). In this tier you want to go after quick wins or low hanging fruits.
- **Tier 2: Interpret Information and Make Judgements:** Go after more complex RPA and BPM/workflow use cases that involve complex rules. You can also investigate Intelligent Data Capture that uses specialized machine learning. Simple NLP can be tackled here as well.
- **Tier 3: Pattern Recognition or Evolved Behavior:** This comprises of Chatbots powered by AI and ML, decisioning systems, NLP etc.

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### *Intelligent Automation Journey*

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#### Tier 1 - Initial Application

- Simple Robotic Process Automation
- Simple Workflow & Apps (iBPMs)
- Basic Data Capture
- Basic Dashboard & Monitoring

#### Tier 2 - Functional Performance

- Complex Robotic Process Automation
- Business Process Management iBPMs
- Intelligent Data Capture & Extraction
- Advanced Analytics

#### Tier 3 - Differentiated Performance


- Natural Language Processing
- Intelligent IVR & Chatbots
- Voice-to-text Technology
- AI-driven Machine Learning Technology

## Chapter 5

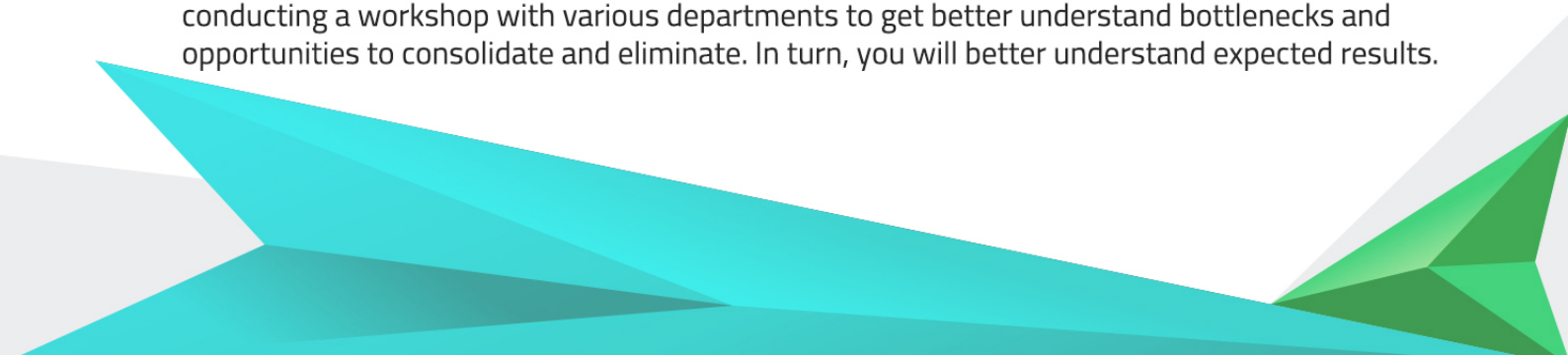
# Do's and Don't of Intelligent Automation Journey

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Intelligent Automation has a wide-reaching impact across organizations. It is important that we treat it this way to ensure the following is avoided at any cost:



Gartner predicts that through 2022, **85%** of AI projects will deliver erroneous outcomes due to bias in data, algorithms, or the teams responsible for managing them

- 1 Taking a Tactical Approach to Implementation:** This approach may give some initial benefits but will get bogged down, due to the lack of adoption across the organization. It is essential to treat this initiative strategically with top management commitment, vision and assigned budget. The intention should be to eventually create a Digital Operating Model COE that embodies intelligent automation and its related components.
  - 2 Wrong Choice of Processes:** If the wrong processes are chosen, there is an increased risk of failure and discontinuation of the program. Moreover, it will lead to low return on investment. On the other hand, if you choose the right processes, it will help garner support from the larger organization. Very structured demand generation, demand management and process assessment methodologies to ensure the team is focused on automating the right processes.
  - 3 Lack of Cultural Adoption within the Organization:** Key to success is following good change management practices. Resisting change is a natural reaction when you do not involve people affected by the change. A few practices to review are indicated by Harvard Business School professor Dr. Kotter, in his 8 step process to manage change. Additionally, McKinsey proposed their 7S framework created by Tom Peters and Bob Waterman in the 1970s.
  - 4 Force-Fitting One Type of Technology:** You may be very excited by the new kid on the block – RPA. Yet, should you use this to automate anything and everything? Obviously not. Stay attuned with the Digital Operating Model (coupled with your processes assessment results) to identify what technologies should be introduced (and in what order) to solve your problems. Sometimes just reengineering a process may solve the majority of your challenges.
  - 5 Incorrect Expectation of Timeline:** These technologies can deliver faster results, but consider multiple factors before forming an opinion or expectation about how quickly results will be delivered. A few factors to consider are: team readiness, cultural adoption, dependence on other technologies (imaging, workflow, other conflicting initiatives, system/application upgrades etc.), maturity of the organization, security/risk/compliance, resource capacity, and more. Consider conducting a workshop with various departments to get better understand bottlenecks and opportunities to consolidate and eliminate. In turn, you will better understand expected results.
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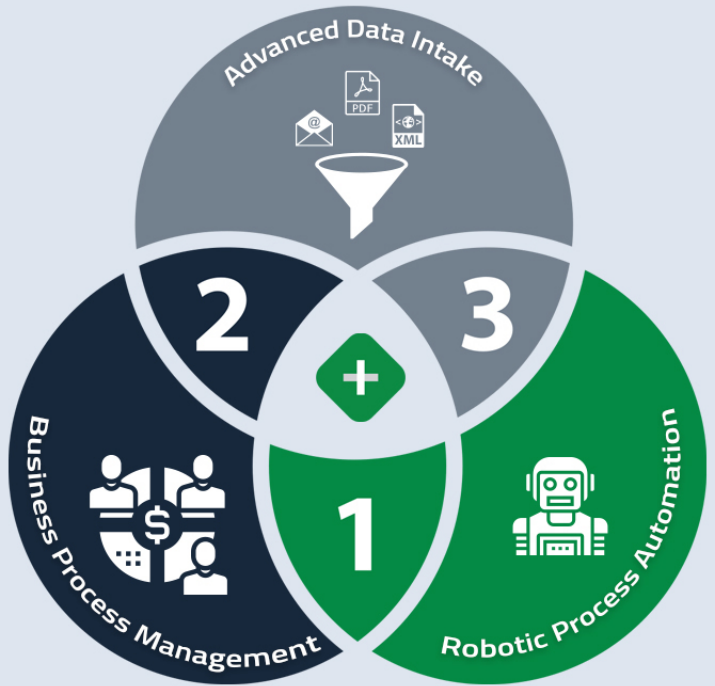
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