# Choosing The Right Process

A guide to process that make good candidates for robotic automation

Software robots can be applied to hundreds of different processes or sub tasks of a process. So how do you choose the right one?

This simple guide covers the key characteristics of a good candidate process for robotic automation.

# Characteristics of Candidate Processes for Robotic Automation:

## Rules Based

Tasks that follow a set of defined steps make ideal candidates for robotic automation. If you can write the rules down with a clear logical pattern of the variances, then the task has a high chance of successful automation.

Tasks that are not rule based and involve subjective decision making should be omitted from a purely unattended robotic automation programme.

However, these types of tasks can be included where the software robot can perform the rules based tasks and present the results for an employee to make a decision and complete or continue the process.

## Repetitive

Tasks that are repetitive in nature also make excellent candidates for automation. A task with little or no variances is the most simple to automate.

Repetitive tasks that are successfully automated are welcomed by users. These types of tasks can be the most mundane for users. Automating repetitive tasks allows users to focus on more varied tasks. This is is a great way to get user buy in.

## Mid - High Volume

Targeting a process that is run many times a day makes an obvious choice for automation. It helps deliver the quickest return on investment.

By delivering quick return on investment, it also allows the technology to be applied to less frequently executed tasks, which promotes further adoption as a second phase.

Targeting a high volume process delivers a big win with users as well. The high volume nature usually means the process is very visible and the results can be very impactful and thus create welcome adoption of the technology for users and the business.

### Example

An investment bank's second task they automated with robots was performed 130 times per day. The robot performed the task in 2.5 minutes vs 20 minutes manually. This really highlighted the impact of the technology.

## Peaks and Troughs

Selecting a process that experiences natural peaks and troughs can again help promote the technology and win adoption.

When peaks are experienced, robotic automation can come into its own. Being 24/7 in nature and working at machine speed allows companies to cope with peaks whilst maintaining regular levels of staffing. Negating the need for temps or redistribution of staff from other teams.

Other benefits include less stressful conditions for staff when managing peaks and less delay for customers.

## Opportunity to Process Out of Hours

Tasks that can be run in the background and out of hours can make good candidates for automation.

These can either be regular tasks that users would perform as part of their day to day workload or additional tasks that could add value to a process.

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## Out of Hours - Regular Tasks

Opportunity to process regular tasks overnight that are currently performed manually by the users. This allows the robots to run mundane sub tasks that support users in the context of an overall task.

### Example

An investment bank moved the mundane tasks of data gathering from websites to an overnight process. These mundane sub tasks formed part of their Customer Due Diligence / Anti-Money Laundering process. This allowed the robots to gather data overnight and present the results to the Analyst who could make a decision on the data (see Rules Based section about mixing robotic based rules driven tasks and subjective decision making tasks as part of one process).

## Out of Hours - Additional Tasks

Once software robots are established for regular tasks it allows companies to explore what additional value can be added to processes by running additional tasks out of hours.

The best way to unearth these additional tasks is to ask the users, if they had unlimited time, what tasks would they run to improve the process they work with? This can serve as a spark for process innovation and get buy in from users themselves.

### Example

A freight forwarder found themselves reacting to customer requests for updates on deliveries. They would only check where a customer's deliveries were when the customer asked them too. But once they had software robots running, they were able to get the robots to check proactively every 10 minutes where customers deliveries were before they were asked. This allowed proactive updating to customers.

## Prone to Manual Error

Tasks that frequently see manual errors can make excellent targets for the business to address with automation. But this needs to be positioned carefully with the users.

The costs of correcting errors can be hugely impactful for companies as well as damaging for customer experience. So being able to automate the tasks that can be manually error prone has big impact for customer service teams or the teams dealing with the results of the errors.

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## Not Subject to On-Going Optimisation

Processes that are already being optimised are likely to change frequently and therefore the robots will need to be updated frequently. That said once software robots are established, they can help support process optimisation projects.

# Summary

There are hundreds of processes in most organisations that robotic process automation can be applied to. The characteristics listed in this document point to the ideal candidates. This guide can be used to help rank your processes for either a pilot or for full scale adoption.

We recommend to start with a simple process or a simple subtask of a wider process for initial proof of concept. Allowing the teams involved to get comfortable with the technology and being able to showcase and explain to wider users. This creates an environment that promotes greater cooperation and understanding for delivering successful pilot programmes and beyond.

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