RPA Assessment Report

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Introduction

Transforming your business with intelligent automation is a journey. As the use of RPA spreads to every function and region across your entire organization, it brings higher customer satisfaction, improved profitability, and greater efficiency.

RPA will transform your business. But it's not a given. There is a right way to implement. Adopting a long-term plan of creating change—operational and cultural—will empower your workforce to be more productive and more creative.

Our best practices are drawn from thousands of customers who have embarked on and scaled their RPA deployments with Automation Anywhere.

Transform

Automation all processes from front-office to back-office to every-office, achieving a digitally transformed state for your entire organization

Scale

Automate mission-critical processes across functions, centralize governance and realized benefits of scaled automation

Start

Automate the first handful of processes and see immediate benefits

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About the Assessment

This assessment is designed to help you gauge where you are in your RPA program journey and provide guidance on how to expand automation efficiently and effectively across your company. We have learned a lot from our customers through our comprehensive A+ Customer Success program about how they have transformed their business with automation. By following the guidance in this report, we can do the same for you.

This report provides detailed guidance based on your answers to the RPA Journey Assessment. Leading organizations have adopted best practices in four key areas:

Vision and Strategy
Developing, managing, and aligning your automation vision and strategy with corporate objectives is critical to obtaining prioritization across the enterprise.

Process and Measurement
Leading organizations standardize and optimize processes across their organization to more effectively prioritize and deliver impactful automation projects.

Organization and People
Executive sponsorship, a federated RPA program operating model, and streamlined change management employing both experienced automation resources and business experts are key to leveraging resources effectively.

Architecture and Technology
Automation must be deployed as an organization-wide platform with low-code/no-code tools, robust features, and modular architecture to become a key business enabler.

How to Read this Report

This report is based on the assessment questionnaire you completed. It is designed to give you a perspective on where your organization currently stands in its automation journey and the opportunities that lie ahead to expand and optimize RPA to get the most value.

Your RPA program journey consists of four general phases:
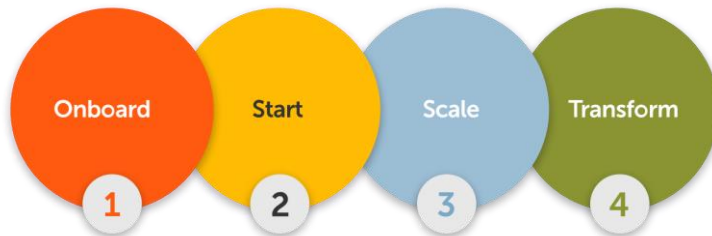
The report summary provides a quick snapshot of where you are for each phase. It may show that your program is between two stages in a particular area. For example, you may get a 1.5 score on vision and strategy, meaning that you haven't quite completed the onboarding stage, but may be in the start phase in other aspects of your program. This may happen due to the averaging of several questions within that area.

When making improvements to your RPA program, we recommend completing milestones in the earliest phase first. This will ensure that you have met the prerequisites to achieve milestones in the next phase quickly and successfully.

Report Summary

These are the results for your RPA program today. This helps you understand where you should concentrate your efforts to successfully scale across your organization. A summary of what your program looks like for each area is in the detail that follows. We also provide recommendations on how to continue your automation journey.

Area	Assessment Result
Vision and Strategy	3
Organization and People	2
Process and Measurement	2
Architecture and Technology	2

Onboard 1 — Start 2 — Scale 3 — Transform 4
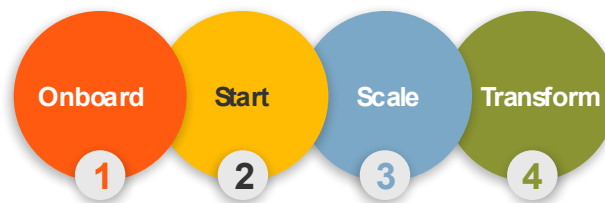
If you are earlier in one area than another, that's OK. Just remember that to transform your organization with automation, you may need to catch up on some areas first before trying to conquer milestones in later phases.

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Common Stumbling Blocks

Here's a shortlist of common stumbling blocks that need not stand in your way.

1. Need for RPA training
2. Communication and change management
3. Partnership with IT
4. Defining success criteria
5. Corporate human accountability

"RPA skills shortage, poor change management, lack of IT ownership, ill-defined success criteria, and disregard for infrastructure management considerations are some of the factors that have led to the failure of several RPA initiatives."

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The Journey

Regardless of where you are on your RPA journey, Automation Anywhere is here to help you maximize return on your automation investment. To get a sense of where you may land, here are some themes across each stage.

1. Onboard

At this stage organizations have just started with basic automation for tactical needs. Long-term vision, strategy, and roadmap does not yet exist. Certain skills, processes, or technology are likely not yet present.

2. Start

Some success has been derived from automation. The value and potential of organization-wide RPA is recognized. Efforts to scale RPA is not yet coordinated across leadership. Certain skills, processes, or technology may not yet be present.

3. Scale

Several process-level use cases across multiple functions have been implemented and significant value realized. The RPA journey roadmap is defined, viewed as strategic to success and supported across leadership. Plans are in action to build world-class capabilities.

4. Transform

RPA is embedded in across the organization globally. World-class RPA capabilities are present across many departments and lines of business. Automation is being leveraged to differentiate products and services and drive innovation across all facets of the enterprise.

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Our Promise

Through all stages of your digital transformation journey, our promise is to enable you to harness the full benefits of intelligent automation for your organization. Our dedicated Customer Success team provides expert guidance, tailored solutions, and the tools and resources you need to help you successfully achieve your automation goals.

We're there to get you there

Developer Portal

Global Support

Bot Store

Professional Services

A-People Community

A+ Accelerators

Customer Success Manager

Partner Ecosystem

Customer Success Engineer

Training & Certification

Private Bot Store

A+ Customer Success

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Your Assessment: Vision and Strategy

Scale - Stage 3

At this stage, there is executive sponsorship for automation programs. The steering committee that includes representation of functional leadership is also in place to track and report the performance of automation programs. The automation pipelines and roadmap are created with clear ROI and business case. Automation programs are designed to meet business function objectives and goals. There are well-defined key performance indicators (KPIs) that are being tracked to realize business values.

Recommendations

Design automation programs to:
a) solve business challenges in the value chain.
b) run automation campaigns which can lead to the identificationof revenue and additional revenue stream.
c) assign accountability and ownership to run automation program within a function for tighter governance.
d) operationalize enterprise-wide SOPs to individual businesses for faster adoption.

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Why Vision and Strategy Matter

At the corporate level, strategic planning is key to setting priorities, allocating resources, and ensuring everyone is working towards common goals and objectives. It is the same for automation. Creating a vision and strategy provides a roadmap and a north star from which the automation team rallies around.

Your vision outlines what outcomes you want. It encapsulates what you want to see as the automation team. Leading organizations typically state that automation is regarded by the business as essential to realizing their objectives and it is leveraged to differentiate offerings and create new business opportunities. This vision statement helps others within the company understand the purpose of the automation team and rallies them to become a part of your automation efforts.

Your strategy is the plan used to achieve your vision. It's like a roadmap for getting there. In this case, it will include the operating model, people, and the process and technology necessary to create a culture of automation. Set S.M.A.R.T. objectives—specific, measurable, achievable, relevant, and timed. At first, they are likely to be about establishing a new structure that can handle organization-wide adoption. Over time, they should map to corporate-level objectives like improving customer satisfaction or driving more revenue.

Before you can effectively set your vision and strategy, you will need to have an automation team, aka center of excellence (CoE), and executive sponsor to ensure that your vision and strategy are aligned to the overall goals of the company. Once you have your strategy, you will want to set your objectives. See our article on defining success.

Your Assessment: Organization and People

Start - Stage 2

RACI (responsible, accountable, consulted, and informed) matrix has to be defined and clear roles assigned to all members of your automation team. The delivery model is centrally driven for entire organization. Your standard operation procedures (SOPs) and policies are developed and executed centrally. Few resources are available with automation capabilities and the gaps in the skillset are supplemented with temporary resources. Your resources are yet to align with the overall execution strategy. The change management is informal, not documented, and appliable only to a few of the business functions.

Recommendations

Establish an automation CoE (Center of Excellence) with sponsorship from leadership and define accountability and ownership across all functions and participants. Prepare a well-defined RACI (responsible, accountable, consulted, and informed) matrix and establish automation governance to liaise between business, IT, and other departments. Set up milestones to move from central governance tofederated and/or citizen-led delivery in due course. Build the skillsets required to run a CoE and align with an overall strategy to grow and execute the automation pipeline. Establish a strong change management governance with a focus on communication to win the endorsement of your business units/organization going through automation transformation. Prepare to undertake changes including business continuity planning, rollback strategy, risk assessment, and mitigation plans with well-documented control framework.

Automation is a Team Sport

Executive Sponsor
A senior executive who will own lead and align the automation business case as well as govern project risk.

Business User
Departmental or line-of-business-level owner who define, measure, and consume automation and its benefits.

Citizen Developer
Builder of automation with business process expertise, usually tasked with building bots for their own team or individual use.

Business
The business will drive goals, set priorities, and seek to maximize ROI.

IT
The role of IT is to ensure the system is scalable, reliable, secure, and performs well.

Developer
Someone who builds bots. Anyone can be a bot developer, from business level to IT, to advanced programmer.

RPA Process Architect
A subject matter expert and analyst who documents work and data flows across systems to enable automation.

RPA Program Manager
A lead RPA project manager, who sets and communicates project objectives, rallies resources, and keeps efforts on track.

Architect/Administrator
A technical systems architect who manages RPA environments, infrastructure, and deployments, as well as scalability and security.

RPA Developer
Builder of automation with traditional software programming skills, usually tasked with building strategic, complex, cross-functional automation.

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Automation Operational Structures

Deciding to create a CoE without planning its operating structure is like asking an architect to design your new house without giving them any details. You'll get something, but it probably won't be exactly what you want or need. There are many important questions to ask when planning your CoE:

- How should it be structured?
- What are the pros and cons of different governance models?
- Which governance model fits our needs for today, and what governance model will fit our needs three years from now?
- How many teams may be interested in building on our RPA platform?
- Do we have teams of people who want to contribute or only individuals?

We recommend most teams start with a centralized CoE. After a central team has established best practices, it's much easier to effectively scale RPA to more groups and expand to a more scalable operating structure. Typically, teams will progress from a centralized model, to partially federated, and finally to fully federated one. Mature RPA teams may consider a hybrid model as well.

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Automation Operational Structures: Centralized vs. Fully Federated

Fully Federated

- Centralized standards (CoE)
- Localized ownership (BU)
- Scalable
- Agile
- Business + IT

In a fully federated model, the role of the CoE shifts from development and delivery to strategy and support. This is when things really start scaling. Business units can be responsible for their own design, development, and delivery—working within the guardrails established by the CoE. Onboarding, documentation, audit logging, reporting, testing, and delivery are all clearly defined in standard operating procedures by the CoE. Then, business teams leverage their subject matter expertise to create bots quickly using the institutionalized standards set by the CoE. The CoE then maintains strategic automation efforts while the business handles individual and team-level automation.

Centralized

- CoE as a shared service
- End-to-end
- Centralized standards and delivery
- Slows down the program at scale

In a centralized governance structure, most RPA development, installation, documentation, IT testing, and delivery is all handled by a single, central team. While it does not scale very well, it is helpful early on as your company gets up to speed. This central team can develop and design repeatable structures and processes to be followed later when more teams get involved in RPA.

Learn more about operational structures on our Developer Portal.

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Your Assessment: Process and Measurement

Start - Stage 2

Processes largely exist without a defined process map, process flow, or complete documentation, often requiring manual intervention. A limited number of users understand the processes and protocols for change management are not formalized to scale automation. Key performance indicators (KPIs) are limited to a few functions or regions, and process monitoring is restricted. Formal process discovery is siloed and non-standardized, resulting in an ad hoc automation pipeline.

Recommendations

Develop a procedures document for each process in the catalog, key-stroke level steps for desktop procedures and exception management. You may also want to consider building value stream maps to lean out the processes and identify improvement areas. Conduct process surveys and tests to create better awareness and account for change management. Undertake process assessments for gauging re-engineering and build documentation to highlight any deficits for optimization. Consider introducing Discovery Bot™ for building automation pipelines within roles and personas. Design key performance indicators (KPIs) that have enterprise-wide coverage and establish local/regional performance scorecards that roll up to global scorecard.

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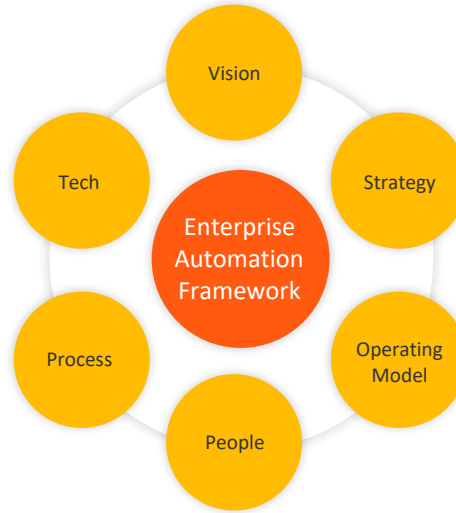ANYWHERE

The Automation Framework

Vendor and technology choice
- Identify the right automation technology solution
- Build scalable automation architecture
- Timeline to advanced automation technologies

Set your vision
- Define digital workforce vision and objectives
- Determine readiness and measures of success for automation

Integrate RPA into your ecosystem
- Create development methodology, tools and standards
- Design for reusability to manage bots as assets
- Report and dashboard your RPA environment

Define your strategy
- Identify automation candidates
- Prioritize funding for automation use cases
- Establish decision rights

Create new capabilities
- Change management strategy
- Learning programs on new skill sets
- Establish new roles and responsibilities

Operationalize your RPA
- Stand up the CoE—establish the team
- Organizational structure and capabilities
- Governance requirements

Vision

Strategy

Tech

Enterprise Automation Framework

Process

Operating Model

People

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Measuring Success

If you fail to plan, then you should plan to fail. Clearly defining objectives and performance indicators sets your CoE up for success. Defining standards for key performance indicators (KPIs) early in your RPA journey will set the organization up for accurate, trusted metrics in the future.

Consistency is Key

As early as possible, start working with representatives from the federated teams (or within your team) to identify a standard way RPA savings can be captured and reported.

Seek to answer questions like:

- How are we calculating what a bot run is versus a task?
- How do we track how much money a bot saves?
- What's the best way to track these values across multiple bots?

To learn how and see examples, read our Developer Portal article on from Defining Success.

See the Future

Whether you are in the early stage of your RPA journey or have been at it awhile, within six months, an executive will come to you and ask, "So how are we doing? How much money have we saved?". Be prepared to have an accurate, data-driven answer. The requirements definition process for each RPA opportunity, define:

- What's the human time that it takes for the task that is being automated to be completed?
- What's the average hourly rate of the workers currently doing those tasks?

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Your Assessment: Architecture and Technology

Start - Stage 2

Though the architecture may be standardized, it requires security, compliance, and regulatory requirement improvements. While RPA adoption is underway, it is mostly used for a few isolated processes and likely limited to desktop automation.

Recommendations

Build scalable infrastructure designed for high-availability and security with adherence to organizational compliance and regulatory requirements. Design architecture to accommodate future requirements for achieving total cost of ownership of the investment. Plan for an automation program that aims to reduce operational cost and errors by implementing process standardization/optimization. Validate/evaluate RPA, cognitive, and analytics capabilities applicable to your business. Infuse automation across businesses with showcasing the value and potential business gains.

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Leave no Process or Employee Behind with end-to-end Automation

Automation 360 has you covered at all angles in the virtuous cycle of hyperautomation

The Automation 360™ Platform

The world's only cloud-native, web-based platform for end-to-end automation. It doubles the number of automated processes, at a fraction of a legacy RPA system infrastructure, with three times faster scaling.

Explore Automation 360

Distribute

Democratize the power of automation by enabling every employee with AARI™ digital assistants.

Explore AARI

Discover

Uncover and document the highest ROI automation opportunities with Discovery Bot™. Crowd source your organization's best bot ideas and best practices with the Private Bot Store.

Explore Discovery Bot

Digitize

Double your automatable processes by turning every piece of structured and unstructured data in any document into a consumable digital asset through AI and ML with IQ Bot™.

Explore IQ Bot

Automate

At the heart of the platform, securely automate your repetitive processes with RPA Workspace™.

Explore RPA Workspace

Optimize

Take an accurate pulse on every bot and critical insights on every process to enable data-driven decisions and enhancements with Bot Insight.

Explore Bot Insight

RPA Maturity Assessment

Automation 360 Cloud: Reap the Benefits of a Modern Platform

Automate 2x more processes, from simple to complex, right out of the gate.

2x proven: Across 100+ document extraction use cases, IQ Bot's pre-trained, out-of-the-box solutions led to 2x more process automation; Customers automated 2x more processes with AARI than with RPA only.

Increase security, agility, and innovation at 1/5 the cost of legacy platforms.

Dare to compare: Automation 360 requires just 20% of typical investment compared to conservative estimates of infrastructure and maintenance costs for legacy on-premises products and cloud-hosted solutions.

Scale 3x faster than other legacy platforms, with less setup, bot creation, and deployment time.

Designed for speed: 300% faster scaling is based on comparison of estimated speeds of development, deployment, and maintenance across RPA platforms. Actual results will vary by customer deployment.

Unify front and back office with ready-for-anything, access-from-anywhere, end-to-end automation

Front Office
Raise your customer satisfaction score with automation that efficiently resolves their issues and optimizes time spent with them.

Explore front-office solutions

Back Office
Turn complex manual processes using legacy systems into streamlined automations, reducing human error and accelerating digital transformation.

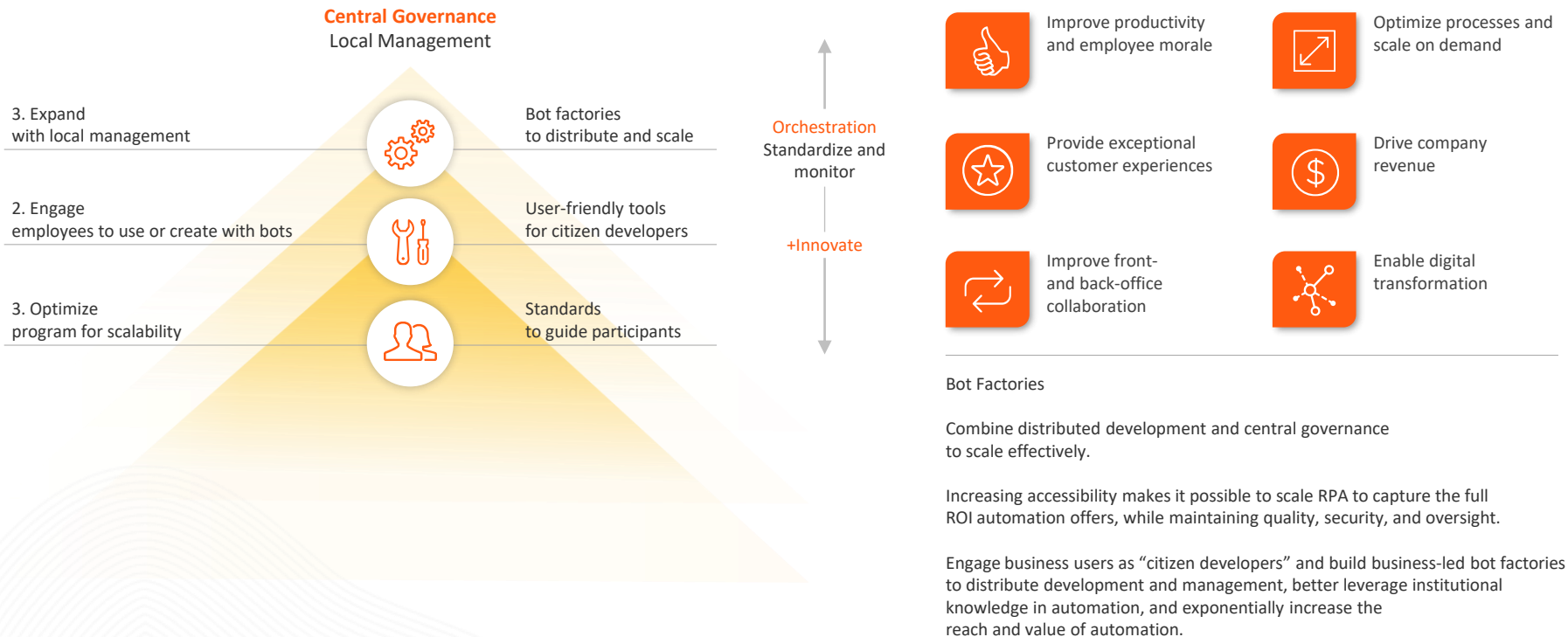**Explore back-office solutions**

Employee Experience
Empower human ingenuity. Integrate automation into employees' day-to-day, freeing them from mundane tasks and increasing high-value productivity.

Explore citizen developers and scaling

Drive ROI 350% through Scaled and Governed RPA

Central Governance
Local Management

3. Expand
with local management

Bot factories
to distribute and scale

2. Engage
employees to use or create with bots

User-friendly tools
for citizen developers

3. Optimize
program for scalability

Standards
to guide participants

Orchestration
Standardize and
monitor

+Innovate

Improve productivity
and employee morale

Optimize processes and
scale on demand

Provide exceptional
customer experiences

Drive company
revenue

Improve front-
and back-office
collaboration

Enable digital
transformation

Bot Factories

Combine distributed development and central governance
to scale effectively.

Increasing accessibility makes it possible to scale RPA to capture the full
ROI automation offers, while maintaining quality, security, and oversight.

Engage business users as "citizen developers" and build business-led bot factories
to distribute development and management, better leverage institutional
knowledge in automation, and exponentially increase the
reach and value of automation.

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Scale with Confidence

CREATE A CULTURE OF AUTOMATION WITH CITIZEN DEVELOPMENT

Enterprise-wide automation requires more than just an RPA A-team. Empower citizen developers to build their own automation to sustainably scale your program.
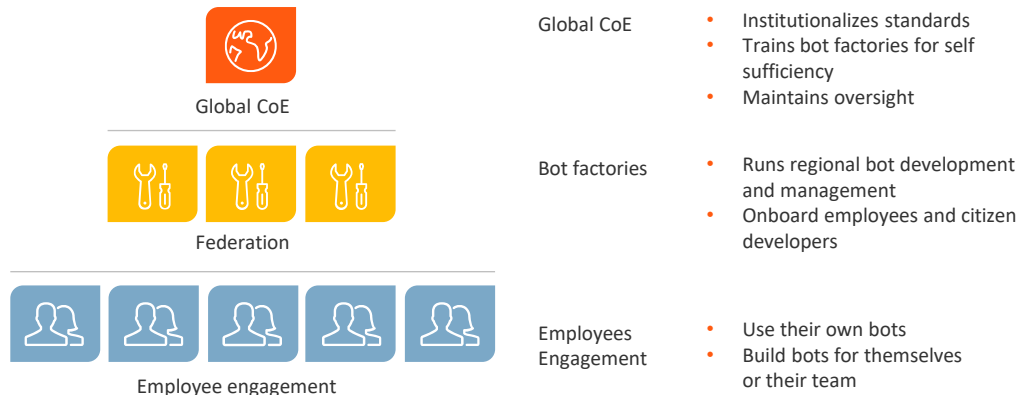
Automation Anywhere offers the only platform that enables employees to work in a governed model. Ensure quality, security and control with a global RPA center of excellence, or CoE, to institutionalize standards and distribute bot development to local or business unit bot factories. Free your CoE to innovate on strategic automation projects by enabling regional level teams to engage employees to use and build their own automation on their own desktop, without disrupting strategic automation managed by the CoE.

Leverage business subject matter experts to build and run automation on their own desktop. Automate faster, maintain oversight on all RPA activity and allow teams to share automation exclusively across their own department. Our citizen developer offering makes it easy to maximize your return on automation investment by expanding automation to every part of the organization.

AUTOMATION 360 ORCHESTRATION LAYER

Only Automation Anywhere offers a complete orchestration layer, with governance, compliance, and security oversight across all RPA activity. The orchestration layer is the key to building local bot factories that free your CoE to innovate on more complex automation projects.

- Configuration
- Identity & access management
- Bot lifecycle management
- Bot execution management

- Logging and monitoring
- Updates
- Extensibility

Global CoE	• Institutionalizes standards • Trains bot factories for self sufficiency • Maintains oversight
Bot factories	• Runs regional bot development and management • Onboard employees and citizen developers
Employees Engagement	• Use their own bots • Build bots for themselves or their team

Global CoE

Federation

Employee engagement

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Scale with Confidence

Our customers become part of the most comprehensive RPA support ecosystem. Get product education and training with Automation Anywhere University, connect with thousands of RPA practitioners in the A-People online community, and have access to 24/7 technical support.

Automation Anywhere University
Our intelligent automation platform comes with world-class training

Visit Automation Anywhere University

A+ Accelerators
The industry's most comprehensive customer success program

Explore A+ Accelerators

Customer Journey Map and Guide
Your guide to the most efficient path to transforming your business with automation

Download Guidebook

A-People
Join the fastest-growing RPA network in the world

Join A-People

Webinars & Events
Learn new skills, network with peers, and connect with industry experts

Explore A+ Accelerators

Documentation
Explore how to install, configure, and use our products effectively

Read Documentation

Developer Portal
Your gateway to developer resources, events and news

Visit the Developer Portal

Blogs
Read the latest insights and news on RPA, intelligent automation, AI and more

Read the Blog

YouTube Channel
Watch the latest demos, tips, customer stories, and more

Visit YouTube

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