



# DIGITAL AUTOMATION CLUB

Building a  Business Case &  Real-World Use cases

# Quick Check-in!

1



Smile, Lets take a picture

2



Quick Energy Check  
(Digital Wall)

3



Starting Video  
Recording...

# Sessions

- MAY 19 □ Introduction to the Club & □ Digital Automation Terms
- MAY 26 □ Emerging Trends & □ Current Technology, Tools
- JUNE 02 Building a □ Business Case & □ Real-World Use cases
- JUNE 09 □ Center of Excellence (CoE) & □ Best Practices
- JUNE 16 □ Process Mining and □ Intelligent document processing
- JUNE 23 □ Automation Operations & ⚠ Other topics

# Agenda

- **▣ BUILDING A BUSINESS CASE**
  - **STEPS TO A BUSINESS CASE (30 MIN)**
  - **MAKE YOUR BUSINESS CASE (10 MIN)**
  - **BREAKOUT - GIVE AND RECEIVE FEEDBACK (10 MIN)**
- **▣ REAL-WORLD USE CASES**
  - **DEMO: USE CASES DIRECTORY (5 MIN)**
  - **GROUP THINK: REAL-WORLD USE CASES (10 MIN)**
- **▣ LOOKING AHEAD: ▣ COE & ▣▣ BEST PRACTICES**





# □Steps To A Business Case



# Options: Making Your Business Case

**Automation Hub** Workspace Explore Dashboards Admin Console

## Automation Pipeline

All 872 Assessment Pipeline 7 Decision Pipeline 14

Search...

Automation Name ▾	Hierarchy ▾
<b>Invoice Processing - EMEA</b> Last Modified: 04/23/2020 Date Submitted: 07/03/2019	Finance & Accounting ↳ Accounts Payable - Invoice to Pa... ↳ Invoice processing
<b>General Rev Accruals</b> Last Modified: 04/24/2020 Date Submitted: 07/03/2019	Finance & Accounting ↳ Accounts Receivable - Deliver to ... ↳ Revenue Accrual
<b>Invoice Matching</b>	Finance & Accounting ↳ Accounts Payable - Invoice to Pa...

BUILD CONTROL VALUE

- > Executive summary
- > Questions
- > Estimations
- > Process
- > Potential solutions
- > Assumptions
- Use case summary

ID	SOLUTIONS	YOY SAVINGS	BENEFIT	OTC	YEARLY MAINT.
1	Blueprism	USD 10,000	3 FTE Savings	USD 120	USD 20
Total		USD 10,000	3 FTE Savings	USD 120	USD 20

Nandan (Sample)

### Opportunity

Email Automation: Automate the sending of emails to new hires

### Benefits

- 198% 3 yr ROI
- 50% faster
- 5x Inc E

### Solution

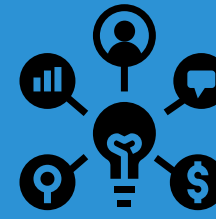
- 1) Auto welcome new hires after checks passed.
- 2) Auto-notify internally on Acceptance.
- 3) Auto initiate drug test.
- 4) Keep new hires engaged with emails.

### Key information

- 1) 1 Bot license working 16 x 7
- 2) 65% of process automated
- 3) 95% of Bot build offshore
- 4) 2 month planned completion

# Digital Automation

7-Step Process



1

Business Objectives



2

Experience Mapping



6 & 7

Implement &  
Monitor



5

Business Case



4

Analysis



3

Assessment

# Identify Business Objectives

Start with Business objectives  
and/or outcomes.



## Why and What

### Improve Employee & Consultant UX

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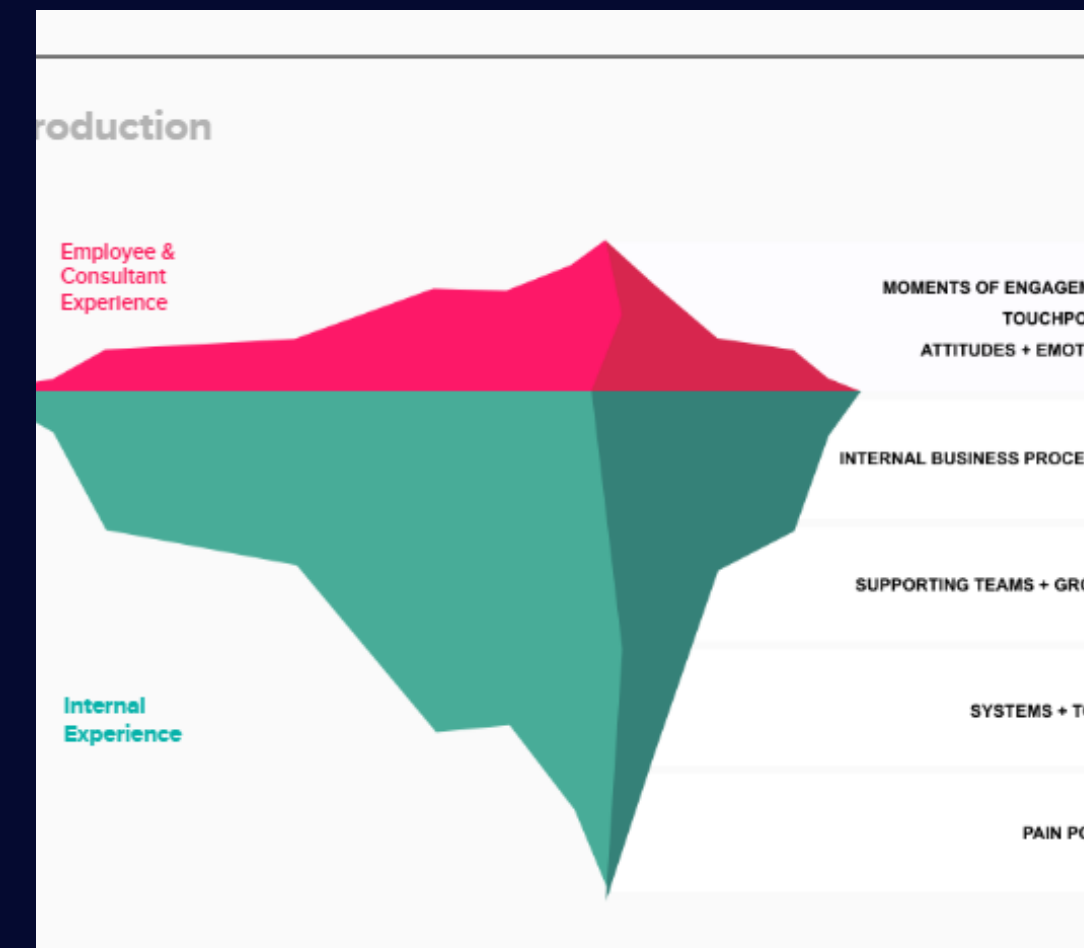
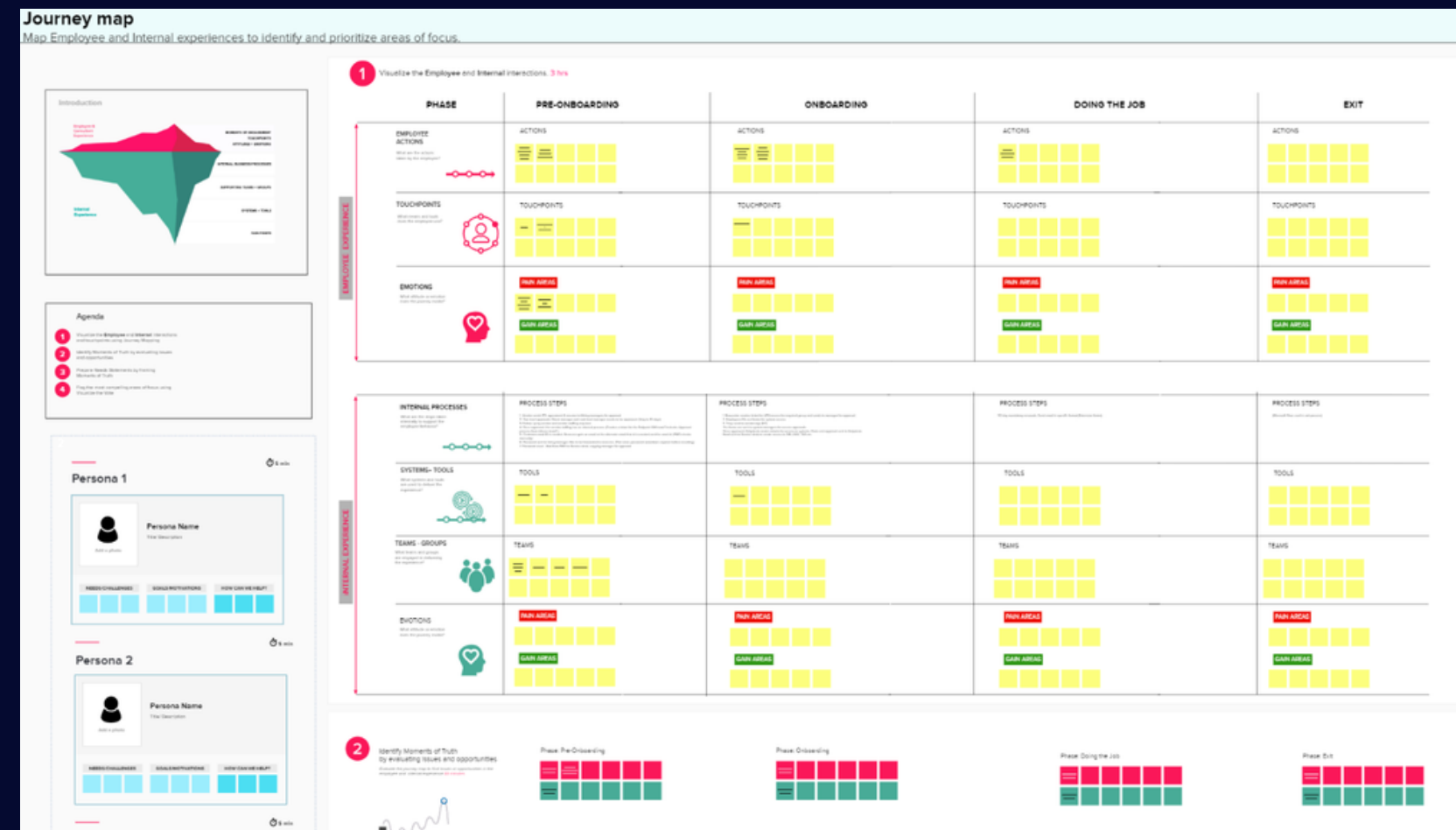
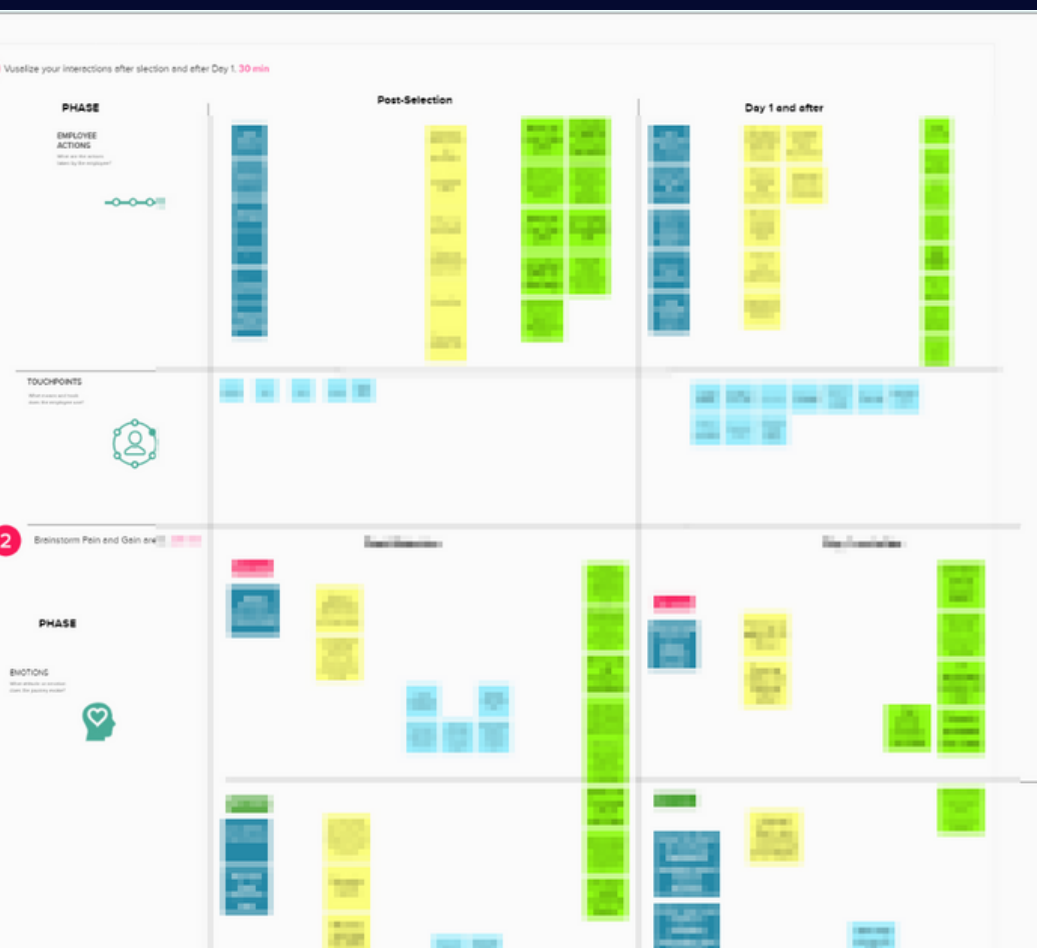
Reduce overall cycle time to Onboard and Exit  
Employees and Consultants to meet industry  
standards.

Think of business problem you have



# Experience Mapping

Bottom-up Identification of Processes and Pain areas



Identify People involved, Processes and pain areas

# Assessment

“  
Nothing is less  
productive than  
to make more  
efficient what  
should not be  
done at all

	<b>Remove</b>	<ul style="list-style-type: none"><li>• Look for opportunities to eliminate process steps or entire processes from a flow.</li><li>• Removing unnecessary checking and keying.</li><li>• Reduce complexity.</li></ul>
	<b>Optimise</b>	<ul style="list-style-type: none"><li>• Alter the flow of the process to improve efficiency, accuracy and customer outcomes.</li><li>• Consolidate tasks and process steps.</li><li>• Removing handoffs and non value added time.</li></ul>
	<b>Standardise</b>	<ul style="list-style-type: none"><li>• Eliminate waste caused by variation in how the same processes is fulfilled by different people.</li><li>• Create clear work guides.</li><li>• Ensure the optimised flow becomes the new normal.</li></ul>
	<b>Automate</b>	<ul style="list-style-type: none"><li>• Explore low-code automations such as RPA &amp; Business Process Management (BPM) Workflow tools.</li><li>• Identify opportunities to integrate data sources and workflows within core systems.</li></ul>

Peter Drucker

ID	Opportunity Name	Use case	Rating (1 to 10)
12	Email creation	Automate email creation	8.75
19	Event email - mailing manager	Send 3000 targeted emails using the Mail	8
28	High school tracking	Automated high school tracking with email alerts to specific team manager with form auto submit.	7.75
22	Entry point registration	Automated entry point registration scoring using Doximity	7.5
15	MLM campaign	MLM campaign automation with lead email	7.5
9	Trigger new leads	Responds New engaged with email and contact email.	7.25
16	Marketing, B2B, setup	Send 1000 emails setup with Marketing, B2B	7.25
20	Event email - New Mail	Send 1000 email to new leads with basic information and other useful info	7.25
5	Internal Notifications	Trigger internal notifications as part of welcome email	7
8	Send new lead password	Automated email and trigger new lead password on Doximity email being sent.	7
13	Onboarding OR request	Automated Change Request creation with tasks to be performed for onboarding.	6.75
25	New consultant notifications	Automated new consultant notifications	6.75
26	Event email - Consultant manager	Send consultant manager a 1000 email checklist	6.75
27	Event email - Consultant	Send one email to consultant with form and other useful information.	6.75
4	Welcome email	Trigger welcome email once account is created to all users	6.5
17	Initial password setup	1000000 Manager calling 10 through mail point automation	6.5
21	Mail OR request	Automated Mail Change Request creation with tasks to be performed for onboarding	6.25
29	Internal onboarding	Send flow with 1000000 and automation with 1000000	6
6	Triggered with email	Notify user form mail being sent into a account	6
14	OR follow up	Automated OR follow up mail follow up and onboarding	5.75
30	Online form request of form	Send 1000000 to request form for applications	5.25

Opportunity	Project	Phase	Start	End	Status	Priority	Assignee	Created	Updated	Deleted	Archived	Deleted	Archived
12	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
19	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
28	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
22	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
15	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
9	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
16	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
20	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
5	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
8	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
13	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
25	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
26	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
27	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
4	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
17	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
21	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
29	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
6	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
14	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
30	Event	Mail	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass

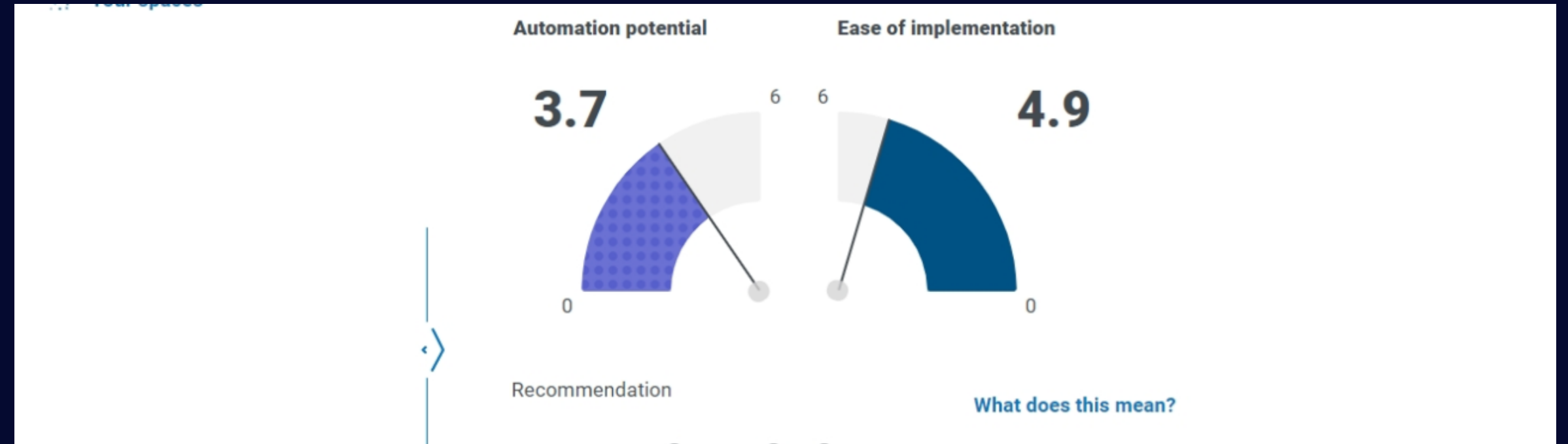
# Assessment

A Heatmap of opportunities

Which process can you best automate? (Use case)

# Analysis

Confirm Automation Feasibility, Suitability and Ease of implementation.



## Resources:

- [portal.blueprism.com](http://portal.blueprism.com)
- [academy.uipath.com](http://academy.uipath.com) (RPA Business Analyst Foundation)

UiPath™				AUTOMATION POTENTIAL											
				FEASIBILITY						SUITABILITY					
				PROCESS STABILITY		APPLICATIONS STABILITY		FEASIBILITY	FEASIBILITY SCORE	PROCESS VOLUMETRY			ERRORS		How would you...?
How will your process change in the next 6 months?	Score	How will your process change in the next 6 months?	Score	What is the frequency of the process?	What is the volume of transactions/frequency (number of times the process is ran/selected frequency)?	What is the average time it takes for the process to be ran once (average handling time/transaction)? (in minutes)	Equivalent FTEs			What is the average number of human errors?					
Source to Pay	Invoice to Payment	Invoice Processing		Some change	0.4	Medium Change	0.8	Feasible	0.6	Daily	360	5	10	10%	Regular (weeks in capacity)
								Feasible							
								Feasible							
								Feasible							
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								Feasible							
								Feasible							
								Feasible							

Feasible & Easy? Transactions/month, AHT



# Business case

## Benefit Analysis

### Benefit summary

- ✓ Number of working days per year  
[260 days](#)
- ✓ Time taken to perform task  
[05:00:00](#)
- ✓ Process frequency  
[Fortnightly](#)
- ✓ Process volume  
[2 times a fortnight](#)
- ✓ Number of working hours per day  
[8 hours](#)
- ✓ Average FTE cost  
[60000.00](#)

Use Case ID.	Use Case (Activity)	Avg. Transactions / month	Avg Handle Time (AHT) / Txn (minutes)	Effort (FTE)	Estimated Automation (%)	Savings (FTE)	Bot build Effort Onsite (hours)	Bot build Effort Offshore (hours)
1	Email automation	1000	8	0.83	65%	0.5	40.0	640.0
						0.5	40	640
	<b>Automation costs</b>							
	# of Bot licenses	1						
	<b>Ongoing Costs</b>	Per unit	Total Costs					
	License Costs per year	\$ 6,500	\$ 6,500					
	Third-party integration license cost	\$ -	\$ -					
	Infrastructure/ Hosting costs per year	\$ 2,000	\$ 2,000					
	Maintenance costs per year	\$ 1,000	\$ 1,000					
	<b>Total Yearly Costs</b>		<b>\$ 9,500</b>					
	<b>One-Time Costs</b>	Per unit	Total Costs					
	Impl. Cost Onsite per hour	\$ 90	\$ 3,600					
	Impl. Cost Offshore per hour	\$ 30	\$ 19,200					
	Management costs per hour	\$ 50	\$ 3,200					
	Team training	\$ -	\$ -					
	Infrastructure setup	\$ 3,000	\$ 3,000					
	Third-party integrations setup	\$ -	\$ -					
	<b>Total One time Costs</b>		<b>\$ 29,000</b>					
	<b>Savings</b>							
	# of FTE	0.5						
	FTE Cost per hour	\$ 55						
	<b>Savings per year</b>	<b>\$ 57,200.00</b>						
	<b>ROI Calc</b>		3 Years					
	Savings for period	\$ 171,600						
	Costs for period	\$ 57,500						
	<b>ROI</b>	<b>198%</b>						

Potential hours savings

**208**

Potential capital savings

**\$6,000.00**

Process analyst

**Nandan Mullakara**

Process owner

**Finance**

Created date

**5/29/2022**

Status

**Assessed**

Space

**My space**

Assessment group

**My group**

Process ID

**1**

Opportunity Type

**Analysis**

Business function

**Finance**

Primary reason for automating

**Productivity**

FTE Cost, Bot Licenses & build effort

# Brainwriting

On the Digital wall (Mural)

□ CREATE YOUR BUSINESS CASE



Use Template Or Be Creative!

## Opportunity

Email Automation:  
Automate the  
sending of emails to  
new hires

## Solution

- 1) Auto welcome new hires after checks passed.
- 2) Auto-notify internally on Acceptance.
- 3) Auto initiate drug test.
- 4) Keep new hires engaged with emails.

## Benefits

198%  
3 yr ROI

50%  
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inc  
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## Key information

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# Breakout



Greet & receive feedback on your thoughts on Automation.





# Best Business Case!



What's your top business case?







# □ Real World Use Cases

# Use Cases

Automation ideas for you filtered by categories!

Have a new idea? [Show case them by submitting here.](#)

**Categories:** All, Banking, Chatbots, Compliance, Customer service, Finance, Healthcare, HR, Insurance, IT, Legal, Logistics, Mainframe, Manufacturing, Marketing, Operations, Pharma, Sales, SCM, Telecom

<b>Time record validation</b> Review for accuracy and notify any missing information.	<b>Invoice Creation &amp; Distribution</b> Bots create Invoices and email to respective customers.	<b>Outward Remittance</b> Enable a native resident customer to transfer money of another currency.	<b>Limit breach management</b> Bots can help with faster analysis and more accurate decision making.	<b>Debit Card Status Updates</b> Auto-update status on the customer's debit card in DMP solution.
<b>Online Brokerage Account</b> Expedite update of the customer's online brokerage account for shares.	<b>Automate healthcare Patient Pre-registration</b> Automate pre-registration of returning patients by automatic medical coding.	<b>Operational finance and accounting</b> Automating various operational tasks in finance.	<b>Payroll Payment</b> The Bot can log in to your bank and schedule the payments as per your payroll software or file.	<b>Account Portability</b> Facilitate account transfer from one branch to the other.
<b>Financial Planning and Analysis</b> Pre-population of forecasts using historical and market data.	<b>Vacation request</b> Filing a vacation request directly into the ERP with Chatbots and ERP.	<b>Employee offboarding</b> Reduce the time to off-board employees.	<b>Demand Monitoring &amp; Inventory Management</b> Monitor customer demand, production capacity and inventory levels	<b>Dormancy Activation</b> Unfreeze an account which was termed dormant due to no transactions.
<b>Analytics and reporting</b> Data capture, cleansing, and pre-population of reports.	<b>Update address changes automatically</b> Update customer address automatically as part of KYC.	<b>Mortgage applications</b> Automate the mortgage application inputs, validation and status.	<b>Expense Reimbursement</b> Automated policy compliance reviews.	<b>Legacy systems Report Generation</b> Submit jobs automatically and generate reports.
<b>Automate SLA Reports</b> End to end SLA report automation for IT / Network infrastructure.	<b>FAQ Bots</b> FAQ bots can handle common customer service queries quickly.	<b>Customer Rebates</b> Customer rebate calculation can be automated with robots.	<b>Automate healthcare Patient Collections</b> Automate the follow-up and collection of payments from patients as required.	<b>Employee onboarding</b> Dramatically compress the Employee on-boarding processes.
<b>Data Transformation</b> Bots can transform data into a structured and uniform format.	<b>Improve customer experience</b> Bots help contact centers reduce wait times by enabling agile support.	<b>Reversal Of Charges</b> Manage reversal of charges levied on the customer.	<b>Credit Checks</b> Bots check the credit limits of your customers before key transactions are executed.	<b>License Forms</b> Auto-fill in the required details in the form for each vehicle state-wise
<b>Manage transaction charges</b> Manage the foreign bank transaction charges for different currencies.	<b>Pre-closure Of Deposits</b> Calculate total payable amount and transfer it to the bank account.	<b>Bank Account Opening</b> Extract customer data from documents, validate and create new accounts.	<b>Improve customer response</b> Improve response times by using bots to navigate multiple system screens	<b>Responding to Queries</b> Bots can respond to simple queries and escalate the rest.

**BOT NIRVANA**

[Home](#)

Members

- Member Home
  - Start here
  - Member Welcome
  - Introduce Yourself
- Community
  - Discussion
  - Events Calendar
  - Small Wins
  - Directories
- Digital Automation Club
  - Session Schedule
  - Club Resources
- Links
  - Automation Reports
  - Automation ideas**
  - Automation Tools
  - Peer match
  - Contact us



# Group Think



Let's discuss some real-world use cases!







□ Looking Ahead



# Let's vote!

Cast your votes on the Digital wall



What worked from this session?



# Looking Ahead

Add your inputs to the Digital wall



What can we do together that is useful to you and everyone?





# Thank You

QUESTIONS & THOUGHTS