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Five best practices for RPA success:

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Introduction.

The benefits of robotic process automation (RPA) are well established. By automating rote, repetitive processes performed by people, companies can see significant time and cost savings, improved accuracy, and happier and more productive employees.

According to a Deloitte survey, companies that adopted RPA practices reported ROI payback in less than 12 months.[1] What's more, business leaders across industries are embracing RPA as witnessed by its projected compound annual growth rate of 40.6 percent through 2027.[2]



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1. "Deloitte Global RPA Survey," Deloitte, accessed April 9, 2021, https://www2.deloitte.com/bg/en/pages/technology/articles/deloitte-global-rpa-survey-2018.html.
2. Jack Myasushkin, "The Major Industries Adopting RPA in 2020 and Beyond," WeAreBrain, September 21, 2020, https://www.wearebrain.com/blog/enterprise-automation/industries-adopting-rpa-2020/.

The challenge: Failure to launch RPA programs.

Unfortunately, even with its potential upsides, many organizations never get RPA off the ground or scale past their first few bots. Another recent Deloitte survey found that only three percent of organizations have scaled their digital workforces.[3] For most, the benefits of RPA go unrealized due to both a lack of vision and poor execution.

For example, organizations attempting to implement RPA with limited or no governance often fail. This creates siloed groups that aren't able to use best practices and lessons learned from each other. The failure to collaborate is further exacerbated when organizations attempt to deploy automation merely as a quick fix to their productivity issues.

Fortunately, with the right best practices, your organization can succeed with RPA where others have failed.

With the right best practices, your organization can succeed with RPA where others have failed.

3. Richard Horton, Marina Gordeeva, and Jessica Green, The Robots are Waiting (London: Deloitte LLP, 2018), https://www2.deloitte.com/content/dam/Deloitte/uk/Documents/consultancy/deloitte-uk-the-robots-are-waiting.pdf.

The solution: Apply best practices for long-term automation success.

The challenges many organizations face when implementing RPA are not the fault of the technology but rather of the company's implementation.

The solution to scaling RPA within your organization is to learn from what has worked and embrace those elements as part of your automation culture. These five best practices come from our customers that are leading the way with RPA:

1. Establish the right governance model and create an automation center of excellence (CoE).
2. Evangelize early automation success within your organization.
3. Adopt an agile mindset for automation development.
4. Go beyond RPA with complete automation capabilities.
5. Put humans in control, not just in the loop.



This eBook outlines how to implement these five best practices to optimize RPA at your organization. They serve as a starting point to realize your automation goals and transform your organization.

Best practice 1: Establish the right governance model and create an automation center of excellence (CoE).

A CoE provides guiding principles, governance, and a repository of best practices, reusable components, and technical expertise, all of which are easily accessible by everyone in an organization.

The following actions will help you create an effective automation CoE:

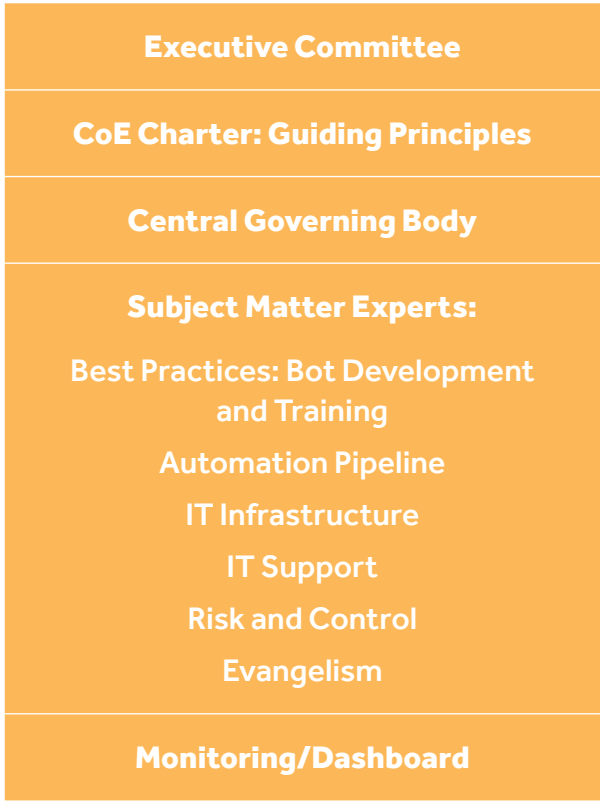
- **Create an automation executive committee.** The committee should have a C-level sponsor, who is either a key participant or the CoE leader, that can help create cross-functional buy-in and drive adoption.
- **Draft a CoE charter.** The charter should include goals and principles and define roles and responsibilities. The governance structure should also be a key component of the charter, outlining rules and guidelines for the CoE.
- **Establish a central governing body.** They will oversee governance and enforcement.
- **Populate the CoE team.** The team should include subject matter experts from critical areas that will be impacted by the shift to automation, including pipeline, IT, DevOps, and more (see the chart on following page for examples).
- **Monitor the CoE.** Use reporting to optimize your automation project pipeline as well as track the ROI and performance of bots that are in production.

A strong governance model ensures quality, security, and compliance. It outlines standards, bot frameworks, and best practices for automation. It also defines the analytics that measure bot performance.

The governance model determines roles of individual team members as well as the overall model for RPA operations. This model can be based on one of three structures:

- **Centralized governance:** Shares services and best practices from the center of excellence (CoE), using common standards across all organization functions. Be aware that coordinating these efforts can slow the program as it scales.
- **Decentralized governance:** Allows business units to be more independent, start fast, and get a quick ROI. However, this can lead to fragmentation of people, technology, and standards over time.
- **Federated governance:** Involves a centralized CoE and standards but local ownership at the business unit level. It leverages the best of both the business and IT worlds, balancing agility and scalability.

The keys to CoE success are well-defined plans, roles, and responsibilities.



Best practice 2: Evangelize early automation success within your organization.

Another key to success is to create a culture of automation. This is done by enthusiastically promoting the benefits of automation as a key organizational value—that is, by evangelizing it.

Evangelism should come from across your organization—from the executive committee and CoE and from employees who have been directly impacted by automation through time savings and process improvements.

Here are a few examples of how RPA evangelism can work in your organization:

- **Create an internal automation portal.** This should provide an intuitive, self-service portal for users to make and prioritize automation requests, calculate ROI, and monitor requests with a dashboard.
- **Celebrate milestones and recognize success.** This can be done at both company-wide and departmental meetings.
- **Organize automation days.** Encourage employees to bring automation ideas to these meetings and help them create their own bots to make their work easier.
- **Offer eLearning.** This can be done internally or through a third party, such as an RPA vendor, and can help everyone at all levels learn about their role in an automated organization and how to use the solution.

There is no greater impetus for success than an organization where everyone is enthusiastic about the benefits realized through automation. For RPA success, it is important to evangelize the merits of RPA, and automation in general, as much as you can.

Best practice 3: Adopt an agile mindset for automation development.

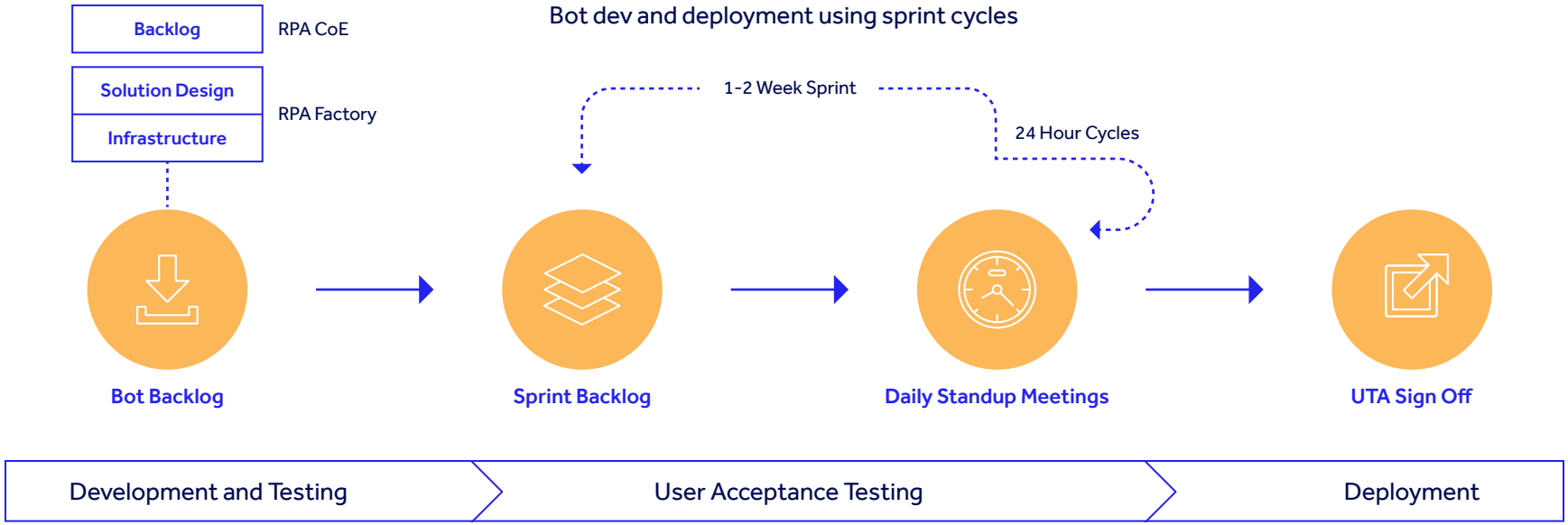
While RPA evangelism provides the spark, the real work begins with developing automations that fuel a truly efficient organization. The best approach to building, testing, and deploying bots is to use a leading-edge development methodology such as agile. Adopting an agile mindset allows processes to be broken down into smaller components that can be quickly automated and helps drive better and faster bot creation.

The agile methodology originated in the engineering and IT fields, but it has quickly spread to other organizational functions. For example, it's become common for marketing teams to use the agile methodology, where sprints and daily standup meetings help them meet deadlines and deliver high-quality content.

Agile development involves rapid iteration and constant communication. Once the building of a bot has begun, the development is managed daily until it is complete, which includes going through user acceptance testing. New enhancements to the bot should ideally be launched in one-to-two-week cycles.

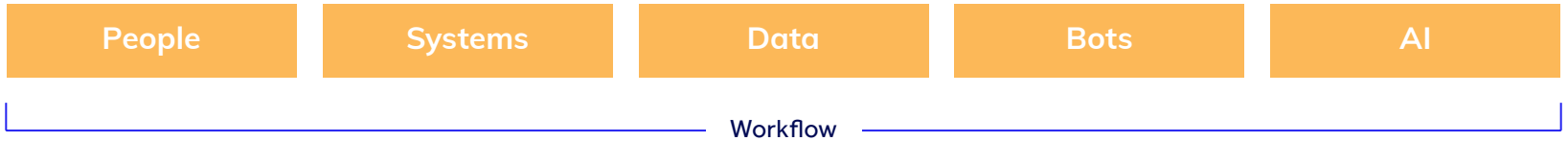
It is important to remember that the job isn't over once a bot is deployed. Bots must be monitored and continuously optimized. Look at critical KPIs, like bot failure rates, to see where and why failures occur and make improvements and ensure they are operating at peak efficiency.

In summary, for RPA success, organizational functions should adopt an agile mindset whenever possible.



Best practice 4: Go beyond RPA with complete automation capabilities.

RPA can significantly improve efficiency for your organization, but it can do even more if it's part of an overall end-to-end automation solution that can orchestrate people, systems, data, bots, and artificial intelligence (AI) in a single workflow. This is called complete automation.



Complete automation must include the following:

- **Workflow:** Orchestrate all of your resources into a single workflow, driving productivity and exceptional customer and employee experiences with comprehensive business process management capabilities.
- **Low-code RPA:** Build bots quickly to handle high-volume, repetitive tasks so people can focus on the work that matters most.
- **Artificial Intelligence:** Add intelligence with best-of-breed AI services from Appian or the vendor of your choice to classify documents, extract data, embed next best action, and more.
- **Low-code Data:** Integrate data from anywhere without expensive migrations for unified and actionable data.
- **Business Rules:** Define and automate complex business logic with zero coding.
- **Case Management:** Handle exceptions and ad hoc activities with task management and actionable data views for improved performance.

You can find many examples of how an end-to-end automation solution can improve the efficiency and efficacy of any business process, in any industry. For example, Deloitte was able to recover more than 100 million euros in value-added tax (VAT) for utilities clients with a team of only four people. And in the public sector, the United States Air Force saved $83 million USD by streamlining and automating the acquisitions process.

Best practice 5: Put humans in control, not just in the loop.

While automation is designed to relieve people of the tedious parts of their jobs, the best RPA programs keep humans in control. Automation shouldn't be about eliminating people from your workforce. Rather, it should be about freeing them to focus on more valuable work while still keeping them in the driver's seat of processes.

Organizations should aim to automate processes end to end while still ensuring humans are at the center and, ultimately, in control. This means empowering employees to make decisions by providing them with the right data at the right time. You should converge real-time data from across the organization to provide a consolidated, 360-degree view for better decision making and understanding.

Keeping people in control is a key benefit for task management and case management, allowing people to address ad hoc and exception activities when they arise. Also, intuitive interfaces let employees analyze all relevant information at once to help them make quick decisions and intervene at critical decision points.

When people are only "in the loop," they are missing the critical information needed to make better decisions and take immediate actions.



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Summary.

Automating your organization is a big undertaking and requires careful planning and knowledge of best practices. The five best practices described in this eBook will help you achieve a fully optimized, automated organization.

Remember these best practices to maximize your RPA success:

1. Establish the right governance model and create an automation center of excellence (CoE).
2. Evangelize early automation success within your organization.
3. Adopt an agile mindset for automation development.
4. Go beyond RPA with complete automation capabilities.
5. Put humans in control, not just in the loop.

Once you have some traction, develop your own best practices. Create a list of all the things that have worked for you, and document them in your CoE best practices repository.

If you follow these best practices along your automation journey, your organization can optimize results and get the most value from your RPA investment.

Take the next step

For more information about Appian RPA and how it can save your organization time and money, request a free demo of the Appian Low-code Automation Platform or visit appian.com.

To speak directly with an RPA expert about how you can automate key processes in your organization, send us an email at automation@appian.com.

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