# Office Automata

# ARE YOUR PROCESSES
# READY FOR
# AUTOMATION?

## Case Studies on Intelligent Process Discovery

officeautomata.com

> "The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency. The second is that automation applied to an inefficient operation will magnify the inefficiency."
>
> **- Bill Gates**

## *CHALLENGES IN*
# AUTOMATION

We all look to Automation to save time and money. However enterprise level process automation has become an elusive holy grail when it comes to successful implementation. Professional services firms, Rolabotic and E&Y, both published studies on the depth of automation failure in the industry, despite the massive growth and popularity of Robotic Process Automation (RPA).

Key statistics from studies:

- 50-70% pilot failure rate (E&Y, Rolabotic [1])
- Only 13% of RPA projects advance beyond the pilot stage (Forrester [2])
- Only 7% of firms had bots deployed in more than one functional area (SSON [3])
- 87% Experienced substantial problems with failed or broken bots (Pega [4])
- 50% Bot deployments are longer and harder than expected (Pega [4])

## Automation Project Success Rates



30%

20%

50%
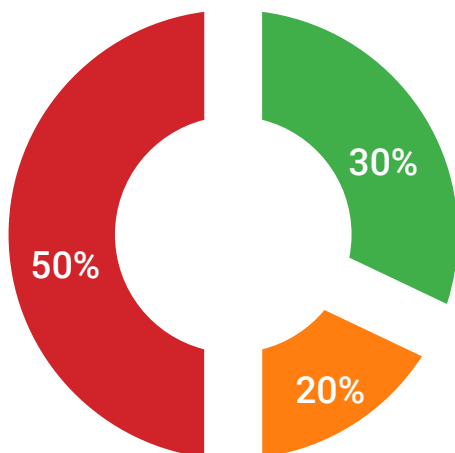
% of Succeding, Struggling, and Failing Projects

## 50-70%

Frequently quoted industry statistics on success of automation projects (E&Y, Robalotic [1])

*WHY DO MOST*

# AUTOMATION PROJECTS FAIL?

These reports beg answers about why there are so many pilot and bot failures in the RPA industry? From CIO Dive [5], "38% fail because the intended processes are not fully understood". The limitation of RPA is that the outcome is only as good as the target process itself. When companies try to automate inefficient operations they magnify the inefficiency, leading to automation pilot and bot failure.

**How does a company know if their automation efforts will be successful?**

⊘ Only if their processes are well mapped and ready for automation.

⊘ Most companies have no metric for how efficient their processes are, and little documentation.

**How does a company know if they have an efficient or an inefficient operation?**

⊘ Using the right process discovery and tracking tools, a company can find out if they have an efficient operation.

⊘ The key difference between an automation pilot becoming another RPA failure story or a successful automation journey is the ability to fully understand each company's unique processes.

# WHAT ARE THE RIGHT
## PROCESS DISCOVERY TOOLS?

There are a few basic requirements for the right tool for finding what can be automated.

**1.** The right tool should track all the users, all the time. This finds all the variations and exceptions in a process, and reduces human bias.

**2.** It should retain all tracking data on-premise for security and long-term analysis.

**3.** It should track processes at a step by step level to get all the automation data needed to build automations, not just screenshots.

**4.** The discovery process should be automated and integrated into all the existing systems.

**5.** It should incorporate system of record data for overall process mapping

**6.** It should uncover the issues in your existing processes so they can be targeted for optimization before automation is implemented.

It is extremely important for a holistic process discovery tool to document, map and measure all processes and their performance. The end goal of an intelligent process discovery should be to identify processes ready for automation or those that need improvement.

## TWO OUTCOMES

We have had two case studies over the last six months that highlight the two major outcomes of our process discovery solution. The first discovered inefficient processes, which helped to avoid an automation pilot failure and create a roadmap for success in the automation journey. The other case study provided the client with a confirmation that they were ready to begin automating their processes. They were able to use our task maps and process models to seamlessly….. automate.

# FIRST CASE STUDY

**In late 2020 we worked with** a multi-billion dollar water filtration company. OfficeAutomata's Intelligent Process Discovery tracked 18 users over 3 months. It gathered 1.5 million user events and the AI discovered 85 tasks for the client.

We uncovered that the client had very little process standardization. This led to a high variation rate in the tasks that were discovered. The client had undocumented tribal knowledge such as communication between co-workers of workaround for existing process failures. They also were using multiple types of outdated programs and AS400 IBM Terminal Emulators to perform invoicing tasks, and had little standardization in the process of receiving those invoices. Before the discovery began, during intial client interviews everyone was led to believe that the client had an efficient standardized operation that would be conducive to automation, and this was not the case.

| ID | Name | Type | First Detected | Most Recent | Volume | Users | Variants | Steps | Average Time | Total Time | Frequency | Automation Potential | Total Cost |
|----|------|------|----------------|-------------|--------|-------|----------|-------|--------------|------------|-----------|----------------------|------------|
| 13 | Acrobat 13 | ✓ Task | 1/25/2021 10:49:22 PM | 2/10/2021 11:38:59 AM | 8 | 8 | 186 | 974.00 | 3 hours 32 minutes 34 seconds | 10 hours 37 minutes 42 seconds | Quarter Hour | 0 | $1,615.5! |
| 14 | OUTLOOK 14 | ✓ Task | 1/27/2021 12:17:50 PM | 3/3/2021 3:59:17 PM | 4 | 8 | 192 | 838.00 | 1 hour 41 minutes 35 seconds | 1 hour 41 minutes 35 seconds | Every Minute | 0 | $257.36 |
| 15 | OUTLOOK 15 | ✓ Task | 1/25/2021 9:40:36 PM | 2/9/2021 4:48:27 PM | 3 | 8 | 2072 | 4678.00 | 4 minutes 6 seconds | 8 minutes 13 seconds | Hourly | 0 | $20.82 |
| 16 | OUTLOOK 16 | ✓ Task | 1/26/2021 1:57:47 PM | 3/1/2021 8:49:16 PM | 6 | 7 | 2129 | 4926.00 | 8 hours 45 minutes 14 seconds | 1 day 11 hours 57 seconds | Every Minute | 0 | $4,657.1' |
| 17 | OUTLOOK 17 | ✓ Task | 1/26/2021 3:24:46 PM | 2/9/2021 3:09:13 PM | 4 | 7 | 211 | 1204.00 | 2 hours 9 minutes 41 seconds | 2 hours 9 minutes 41 seconds | Every Minute | 0 | $287.47 |
| 18 | Acrobat 18 | ✓ Task | 1/26/2021 3:24:46 PM | 2/8/2021 4:29:43 PM | 3 | 6 | 147 | 792.00 | 11 minutes 29 seconds | 1 hour 31 minutes 53 seconds | Quarter Hour | 0 | $174.58 |
| 19 | QAD.Client 19 | ✓ Task | 2/3/2021 8:32:54 PM | 2/9/2021 9:33:03 PM | 4 | 5 | 911 | 675.00 | 1 hour 26 minutes 4 seconds | 1 hour 26 minutes 4 seconds | Half Hour | 0 | $136.29 |
| 20 | Acrobat 20 | ✓ Task | 2/2/2021 3:32:01 PM | 2/9/2021 7:13:40 PM | 3 | 6 | 295 | 418.00 | 40 minutes 43 seconds | 40 minutes 43 seconds | Half Hour | 0 | $77.36 |

**First Case Study Task Summary Panel**

Under the "Variations" header is shown 9 tasks, each with a high number of variations. For example under ID 14, Name OUTLOOK 14, OfficeAutomata Intelligent Process Discovery found that there were 192 variations in how users completed that task. This means there were 192 different ways that this task was performed, from start to finish, by the users while they were being tracked. In our experience this is indicative of a non-standardized task. The high number of steps found in the task also indicated a low automation potential.

# AUTOMATION WILL FIX YOUR BROKEN PROCESSES

Many companies are in a similar situation, having no idea how inefficient their operations are, or where to start in fixing them. They believe that automation or process discovery will resolve their existing process problems and inefficiencies.

The first step in successful automation is establishing an efficient operation which the automation can be based on. Our Intelligent Process Discovery system points to the exact areas that need optimizing. Without this first step, the only expected end result the automation implementation will be failure.

*OUR RECCOMMENDATION FOR*
## THE FIRST CASE STUDY

From the results of our analysis, OfficeAutomata identified and recommended which processes that our client needed improve prior to automation. Our data allowed them to target exactly which parts of their existing operational processes needed to be improved and standardized to avoid magnifying inefficiency in automation.

**Key Areas of Improvement Identified:**

- Standardize input systems such

- Implement an Intelligent Document Processing system (automated PDF processing)

- Document tribal knowledge in Q/A Wiki (for automation exception handling)

- Create Automation Center of Excellence

- Standardize tasks with process improvement recommendations and Continue Tracking to monitor process improvements until their processes were ready for automation.

## WHAT MAKES
# KNOWING YOUR PROCESSES DIFFICULT?

Most managers do not know how many processes it takes to run their organization, according to Business process management specialist Carl Lehman. This is where machines outdo us: they can get an overall picture far more quickly than a team of humans can build over the course of a few months.

Managers know some of the valuable tasks and processes, and may have looked at a couple of processes and modified them for the best possible outcomes. However, when trying to document all your processes, it can be difficult to get an accurate picture.

Humans are prone to errors and biases in manual process reviews. One might explain each detail, another might miss something that seems unimportant, others might keep the information to themselves, wary that jobs might be replaced. Another reason is that your organization likely has some turnover, so when an expert in one or more particular processes leaves, their tribal knowledge often departs with them.

**These challenges make it hard for a leadership team to even know where to start.**

# ADVANCING THE
## AUTOMATION JOURNEY

Some companies are forward-thinking and planning for a successful future. They have hired people to examine their processes, in order to collect data and feed it into AI to automate processes. This all sounds great in theory, right?

In theory... but, are those people communicating with others across the organization so that other processes can be improved? Are they getting detailed enough data? Are the staff members they are conversing with telling them the truth? What happens with the regular staff member takes a sick day and the process works a little differently.

Regardless of how good those people are at collecting data, humans can make a mistake - and a vital step in the process goes undocumented.

This is where the OfficeAutomata Intelligent Process Discovery shines. It is a computer learning system that tracks all users, on all days, without human bias. It is the most efficient way to get clean data on what processes are really being used in your operation, and where they require standardization and improvement.

Our data saved our customer thousands of dollars and months of effort in failed automation attempts. They now have the data they need to update their processes effectively, and create efficient operational practices that can be successfully automated when they are ready.

# SECOND CASE STUDY

**In early 2021 we worked** with a mid-sized healthcare provider. OfficeAutomata tracked 2.5 million user events, with 30 users over a 3 month period, and the AI discovered 256 tasks and 8 processes. 170 of those tasks had a high automation potential and 86 of them had a low automation potential.

The tasks that were designated with high automation potential were complex tasks averaging 50 steps in length. Our data showed low numbers of variations - a key component to produce usable task maps for successful automation. Our system integration partner could then export the task maps and process models OfficeAutomata created into their automation suites to produce efficient bots to automate the client.

| ID | Name | Type | First Detected | Most Recent | Volume | Users | Variants | Steps | Average Time | Total Time | Frequency | Automation Potential | Total Cost | ROI |
|----|------|------|----------------|-------------|--------|-------|----------|-------|--------------|------------|-----------|----------------------|------------|-----|
| 30 | WINWORD 30 | ☑ Task | 3/11/2021 2:28:52 PM | 3/23/2021 5:19:35 PM | 3 | 5 | 24 | 64.00 | 1 hour 20 minutes 24 seconds | 2 hours 40 minutes 48 seconds | Hourly | 39 | $0.00 | $0.00 |
| 31 | OUTLOOK 31 | ☑ Task | 3/10/2021 3:00:35 PM | 3/24/2021 12:25:00 PM | 3 | 4 | 26 | 66.00 | 39 minutes 8 seconds | 3 hours 15 minutes 44 seconds | Hourly | 37 | $0.00 | $0.00 |
| 32 | msedge 32 | ☑ Task | 3/10/2021 6:41:09 PM | 3/23/2021 5:45:06 PM | 7 | 4 | 18 | 36.00 | 1 hour 3 minutes 12 seconds | 1 hour 3 minutes 12 seconds | Hourly | 72 | $0.00 | $0.00 |
| 33 | msedge 33 | ☑ Task | 3/10/2021 3:59:19 PM | 3/23/2021 6:03:22 PM | 4 | 2 | 22 | 21.00 | 30 minutes 21 seconds | 30 minutes 21 seconds | Hourly | 69 | $0.00 | $0.00 |
| 34 | msedge 34 | ☑ Task | 3/11/2021 2:25:26 PM | 3/23/2021 6:01:51 PM | 6 | 4 | 36 | 39.00 | 28 minutes 32 seconds | 4 hours 45 minutes 29 seconds | Hourly | 66 | $0.00 | $0.00 |
| 35 | msedge 35 | ☑ Task | 3/11/2021 1:15:26 PM | 3/23/2021 5:41:55 PM | 3 | 7 | 7 | 23.00 | 5 minutes 37 seconds | 5 minutes 37 seconds | Hourly | 75 | $0.00 | $0.00 |
| 36 | OUTLOOK 36 | ☑ Task | 3/10/2021 2:54:16 PM | 3/23/2021 1:34:59 PM | 3 | 5 | 34 | 65.00 | 1 hour 29 minutes 40 seconds | 1 hour 29 minutes 40 seconds | Hourly | 38 | $0.00 | $0.00 |
| 37 | OUTLOOK 37 | ☑ Task | 3/10/2021 3:00:26 PM | 3/23/2021 9:20:14 PM | 3 | 4 | 32 | 86.00 | 37 minutes 38 seconds | 3 hours 45 minutes 53 seconds | Hourly | 15 | $0.00 | $0.00 |
| 38 | OUTLOOK 38 | ☑ Task | 3/10/2021 3:07:35 PM | 3/19/2021 1:56:02 PM | 3 | 8 | 19 | 59.00 | 2 minutes 2 seconds | 36 minutes 42 seconds | Hourly | 46 | $0.00 | $0.00 |

**Second Case Study Task Summary**

Under the "Variations" header is shown 9 tasks all with a low number of variations. For example under ID 31, Name OUTLOOK 31, OfficeAutomata Intelligent Process Discovery found that there were 26 variations in how users completed this task. This means that there were 26 different ways that this task was performed by the users while they were being tracked. Those 26 variation are all the same task but how the users got between starting and finishing the task varied 26 times. In our experience this is a great and comparatively low number. The low number of steps found in the task was also indicative of a high automation potential which is also calculated by the AI.

# DISCOVERY SETS YOU UP TO SUCCEED

At the outset both companies looked similar. The defining difference between the Case Study 1 and Case Study 2 was that the second company's tasks were standardized.  Everything that could be found was discovered. Our Intelligent Process Discovery process found tasks that were ready for automation and some that were not.  This sorting process provides data-backed metrics for automation potential and a basis to calculate ROI.

Our system reduced the time spent by business analysts performing manual process discovery and interviews by 80%. It pinpoints those tasks that are ready for automation and provides our clients with a road map for the automation process, making automation smoother, shorter, more successful, and therefore much less expensive.

## *OUR RECOMMENDATION FOR*
## THE SECOND CASE STUDY

From the results of this case study, OfficeAutomata recommended that the system integrator partner automate the tasks found to have high automation potential and to improve their client's process efficiency. We recommended that they take the tasks designated as having low automation potential and perform process improvement to increase the efficiency of the client's operation, based on the collected data that pinpointed the exact locations of inefficiency which could be remedied.

**After our initial discovery they were able to:**

> Export task maps to developers for RPA Implementation.

> Expand to more users.

> Continue to track processes and automation implementations.

> Standardize low-automation potential tasks with process improvement recommendations.

> Continue Tracking to monitor process improvements until the other processes were ready for automation.

## Goal of Process Discovery

Process discovery finds and documents existing processes. The more a process is repeated the more likely it is to be discovered. Without process standardization the quantity and quality of those repetitions decreases. Automation is something that can result and benefit from process discovery, but it is not going to be the result every time for every company. Our tools prepare you for success in the automation process by:

> Determining those processes that are ready for automation.

> Creating an effective task maps & process model, a fundamental element in a successful automation building process.

> Identifying the processes that are not yet standardized enough for automation and showing clients where to focus their energy in process updates.

## Key findings

These case studies were successful for the clients at both stages. It gave the system integrators and the clients' management the right information to move forward in their automation journey. In the first case study, OfficeAutomata's Intelligent Process Discovery helped the client avoid becoming another failed RPA pilot and assisted in recommending the right improvements with the cost numbers to back up those improvements. In the second case study, OfficeAutomata's Intelligent Process Discovery found many processes with high automation potential which the system integrator could then act on to provide accurate and persistent automations for the client.

# Key Finding - Task Maps

A Task Map is a visual representation of all the linkages and variations between events.
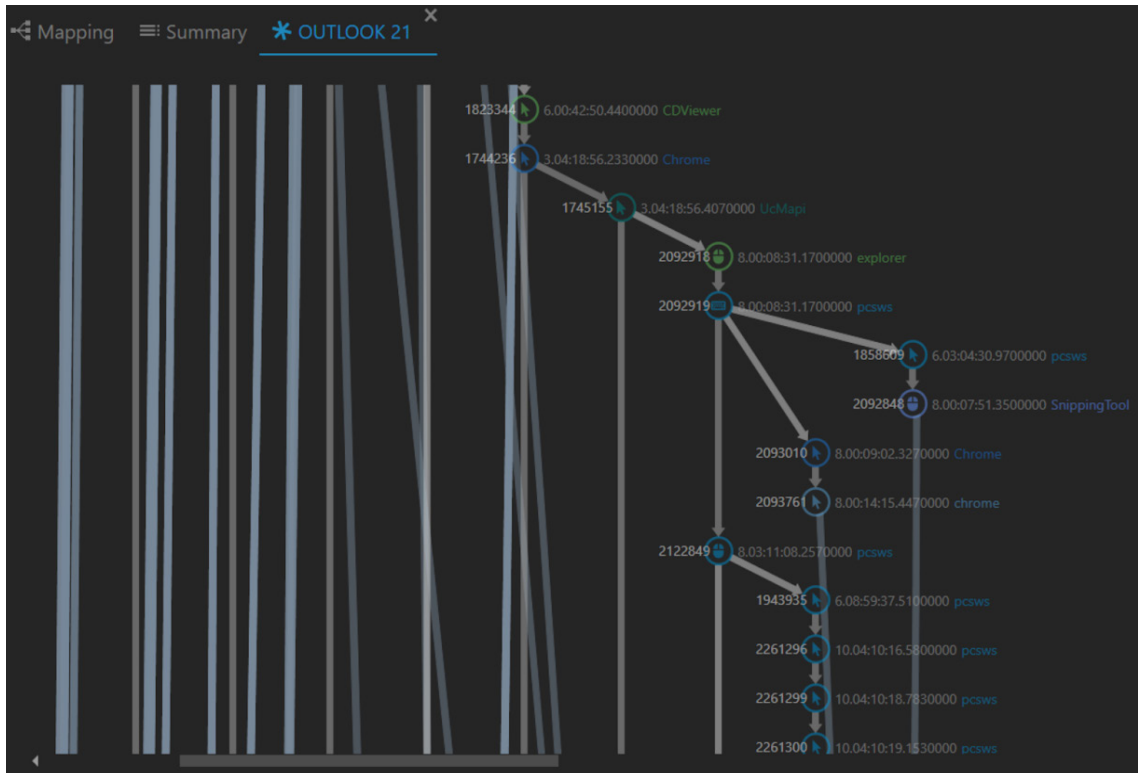


This is an example of a task map with low automation potential from our First Case Study. Each vertical line on the left side is a connection to a variation which then branches off into more connections and variations. On the right is a branch of a variation. In this map, there are 30 out of 1018 variations being represented, with the rest of the variations located higher and lower in the map.

An example of a task map with high automation potential from our Second Case Study. Each vertical line on the left side is a connection to a variation which then branches off into more connections and variations. On the right are four branches of a variation. In this image, the task being represented has 8 out 20 variations being shown.
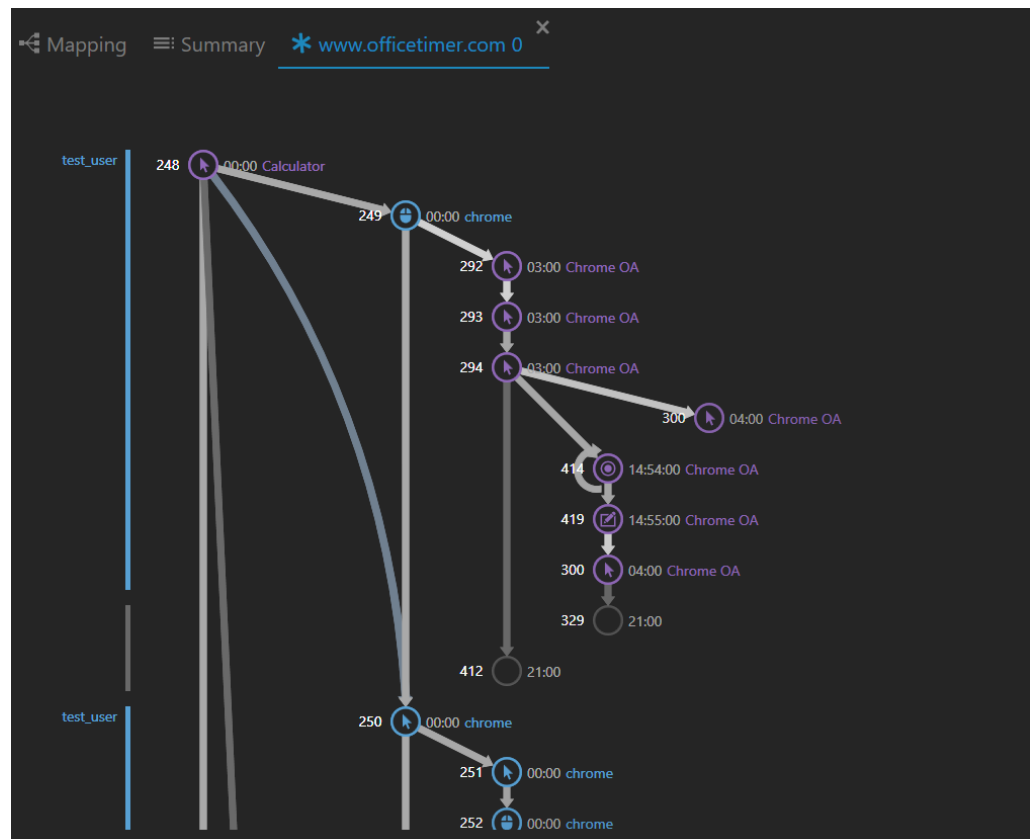
## Results

Intelligent Process Discovery reduced the time spent by business analysts in manual process discovery by 80%, and increased the amount of potential tasks to automate by an average of 60% by uncovering unknown tasks to the client's management. Our diagnostic analysis provided the data necessary to build a business case for digital transformation or automation, including ROI, cost, duration, and complexity.

Intelligent Process Discovery was able to highlight for each client the efficiency, or the inefficiency of their processes. We assessed the usefulness of automation for each client based on a detailed analysis of the client's own unique data plume. From this data, clear automatable tasks were discovered, and we were able to  recommend detailed improvements to the client's processes with low automation potential. We also uncovered all the processes that could be automated and prepared them for the automation process. We feel our product is a necessary first step, and the right tool for clients starting their automation journey. Intelligent Process Discovery alleviated the need for time intensive manual process discovery and user interviews, which are often biased and lead to overconfidence in automation potential.

## HOW TO
# GET STARTED

Intelligent Process Discovery and its potential to transform the way businesses work is essential to the growing automation market. But you may still be wondering if it's the right approach for your specific business size or industry.

One of the key benefits of Intelligent Process Discovery is its flexibility. You determine the process and parameters for analysis, then plan for the changes you're able to implement. Whether your goal is increasing efficiency or implementing automation, major change doesn't have to be overwhelming, and you don't have to go it alone.

OfficeAutomata offers several options to assist you with your next steps:

- Do a 60-day trial of Intelligent Process Discovery. It's on-premises-based for quick and easy install, 90% automated, includes tutorial, guides and dashboards to see your own data in action.

- Join one of our daily 30-minute webinars or schedule a personal instructional session. Ask questions of our Business Analysts to learn more about what you're seeing and how to best use Intelligent Process Discovery to your advantage.

- Contact a representative through our website for any other questions, or to get started right away on the process discovery solution that's right for you.

# *REFERENCES*

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