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Software Robots - the Virtual Workforce.

Choosing Your Lane:
A Guide to the Three Types of Robotic Process Automation Technology

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Blue Prism's Robotic Process Automation Technology

Blue Prism created a new technology category called robotic process automation, deploying fleets of software robots that are secure, reliable and scalable.

As economies recover and businesses find themselves with workers who are struggling to balance repetitive, back-office tasks with the kind of customer-engaging work that drives business value, interest in robots and artificial intelligence in the workplace grows.

In order to handle the monotonous work that eats up an organization's valuable human resources, Blue Prism created a new technology category called robotic process automation, deploying fleets of software robots that are secure, reliable and scalable, don't make mistakes, and don't need time off, thus leaving skilled human workers to focus on the kind of high-value, creative work that only they can do.
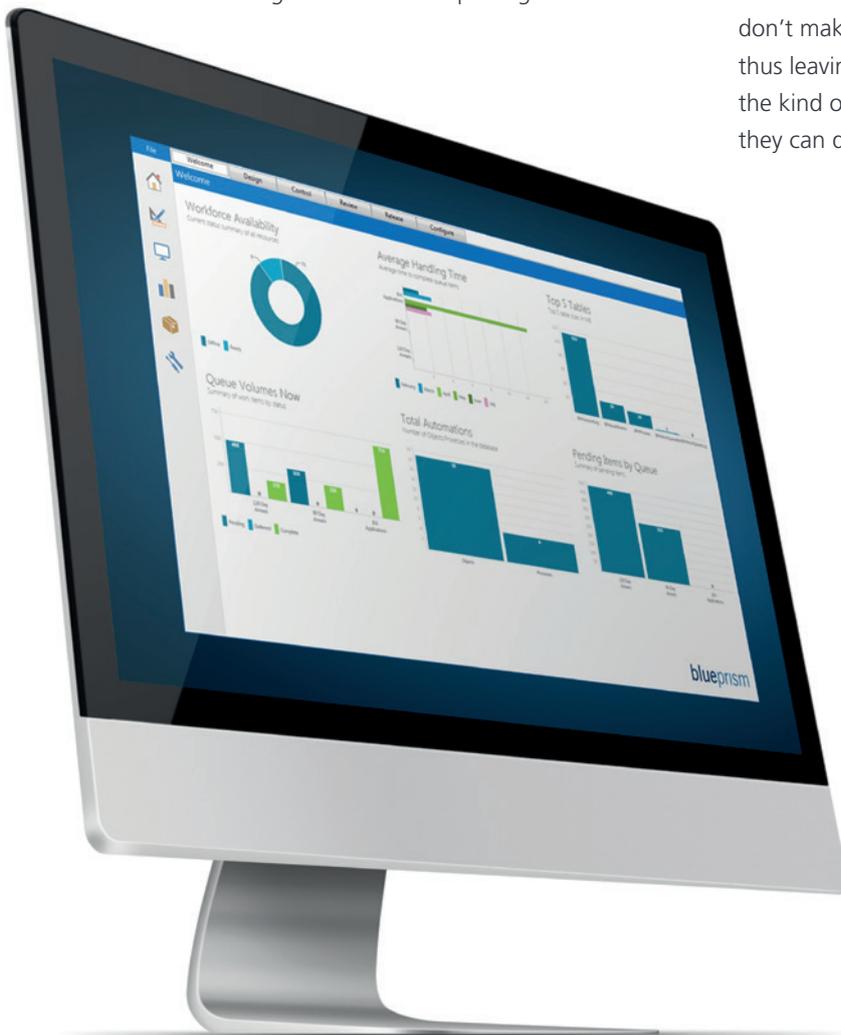
Automation offerings

Recent estimates hold that nearly 80 million jobs in the United States and 15 million jobs in the United Kingdom are good candidates for automation, creating the need for automation solutions that can address a variety of business needs.

With that kind of opportunity comes a lot of market hype and many different options for businesses to consider – which also leads to market confusion for enterprises trying to decide how this technology fits into their businesses. Based on market analysis and multiple interviews performed by Professor Leslie Willcocks from London School of Economics and Professor Mary Lacity of University of St. Louis Missouri, automation offerings can be classified into three main categories, called "The Three Lane Highway," each of which addresses different automation needs.

Professor Leslie Willcocks and Professor Mary Lacity

The Three Lane Highway

Desktop Recorded Automation, Software Development Kits (SDKs) and a Digital Workforce.

Desktop recorded automation:
This method records and replays individual, tactical tasks that usually involve navigating systems on a desktop. These automated tasks are triggered manually or by very simple events, like receiving an email, and are made up of recorded individual keystrokes. It can be deployed very quickly and is hosted in isolation by each desktop, individual from the others in the system, though it doesn't address any compliance or risk requirements and can't be standardized across all desktops. This type of product is best utilized by an individual or a small team to help automating small tasks, and assumes no compliance or regulatory requirements.

Software development kits (SDKs):
These solutions target IT users rather than business users and are intended to increase the responsiveness of IT. The implication is that the control of the platform and the scope of the automations that can be delivered is still limited by the availability of IT to meet business requirements which will limit the benefit that can be achieved and prevent control being provided to the business. These tools often result in a new end-user system or provide a "virtual API" to facilitate IT projects where interfaces for them don't already exist. Many require coding by skilled IT developers, who need to consider not only the automation tasks but also the security, change management, development environment and code needed to make it safe for the IT enterprise. These are best suited for organizations that are working on custom IT integration projects or want to retain full control of the RPA capability within the IT function.

These first two categories are best suited for businesses with particular needs, whether they be simple automation of one or two routine tasks, or a major IT integration undertaking. But neither type of solution adequately addresses the unique concerns of an enterprise. The only type of automation that was designed with the security and technology needs of enterprise IT in mind is the third category: **a Digital Workforce**.

A Digital Workforce

A digital workforce is centrally-managed, scalable and server-based and meets the needs of both operations and IT to deliver strategic benefit to an enterprise. In order to make it enterprise-worthy and data-secure, IT is involved from the beginning of deployment, and the business itself manages configuration, control and monitoring.

The solution is installed onto the presentation layer of an enterprise platform that is flexible and centrally governed, avoiding shadow IT issues. This is critical. You can't download this software and play with it. In order for it to be enterprise-worthy you can't record a process and expect your data to be secure and any vendor who tells you otherwise isn't being honest.

Why? Because it's important that RPA be properly overseen by credentialed IT professionals who have strict standards for security, control, data integrity, change management, scalability, robustness and scheduling. Deployed within the data center, this system is well suited for automation of mission-critical processes, yet businesses can make any needed changes and adjustments without tying up IT resources and without the need for coding expertise.

A digital workforce provides the capability for automating processes that would ordinarily be done manually by humans or through extensive customization of existing IT systems, allowing for more automation with significantly less investment and greater deployment speed.

Take, for example, the process of onboarding a new hire. Instead of needing to manually collect and input a new employee's information into multiple systems—referred to as "swivel chair processes"—an HR department can relegate those tasks to a software robot and focus instead on meeting with hiring managers to craft ads or work on addressing personnel issues. Similarly, a financial organization can take the burden of high volume transactions such as purchase orders and invoicing off their employees, allowing them to focus on creating an exemplary customer service experience.
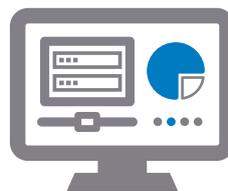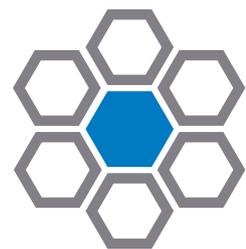
Strict standards for security   *Control*   *Scalability*

How to Determine the Right Solution for You

Enterprises considering implementing an RPA technology need to consider their end goals if they are to pick the solution that will deliver the most value to them.

Are you looking just to help a few employees out? Or are you looking for a transformation of your back office processes? Or are you looking for a wider solution and need to consider compliance guidelines and the ability to track and verify how all processes are being run?

Here is a sampling of the types of questions you should be asking yourself or your partner vendor:

- Are you looking for an automation platform with the ability to reliably and robustly interact with third-party systems?

- Are you looking to reduce the number of human interventions and risk-introducing errors?

- Does your RPA solution need to respond to variances in performance such as fluctuating network performance and lost processing time?

- Are you looking to automate light tasks in an agent-augmentation role or a wholesale automation of end-to-end business processes that free up the human operator for higher-value tasks?

- Are the processes low-importance tactical automations based on localized practices and imperatives or are they high-value with high transaction volume?

- How will the solution manage and prioritize the demand pipeline for automation?

- How important is it to optimize the technical architecture for performance and scalability?

- Is having a centralized view of analytics or audit capabilities important?

- How will the solution manage exceptions – is a human expected to monitor and intervene or will they be automatically managed?

- If security is important, do you need all activity in the system to be audited ranging from logging in to making a change to a process or configuration within the platform?

- How will the data be protected and managed? Do you want your data to be inaccessible to human intervention?

- Do you need to have a disaster recovery plan to protect the processes you are looking to automate?

- As systems and business requirements change, how important is ease of making changes to the automations? Can these changes be handled quickly without significant effort or will re-recording or IT be involved in making the required process change?

How to Determine the Right Solution for You (contd.)

- Is standardization of processes critical?

- How will you handle manual distribution of changes across a large number of desktops?

- Are your processes mission critical like regulatory compliance standards that require full visibility and traceability of every action and decision within a process such as: PCI, HIPAA and SOX?

- Are SLA's important to meet your business' requirements?

- Is the work distributed manually or automatically to accommodate SLA's?

- Would you have the capability to manage demand and work prioritization on specific processes to meet agreed upon SLA's?

- Will you be able to automatically redeploy resources against the highest business priority?

- Do you need a centralized view of analytics or audit or are you reliant on an individual to confirm and trigger the process?

- Do you want only authorized users to access and edit automations and control their execution?

- How important is it to scale the automations to more effectively manage the volumes of work?

- How will you ensure that the automation is executed using the latest version of the configuration?

- Is it critical to have a centralized enterprise view of the automations being executed, what is outstanding and which items require attention?

- Will you have a segregated environment (DTAP) to enable controlled implementation and testing of changes without risk of unintended changes or business interruption to production environments?

- How will you manage version control, release management, environment provisioning and user access control?

- Can the solution handle different desktop instances and environments and will it hamper development and create a maintenance burden for IT?

- How will you align development and maintenance activity across functional business areas?

- What kind of education and training will be provided to the business?

- Will you need to have visibility into what work has been completed, what work is outstanding, what the work priorities are and can they be available to complete outstanding work items quickly?

- Do the process automations need to be in a secure data center, public cloud or private cloud?

The Virtual Digital Workforce - the secure and scalable solution.

As the questions above outline, there are many things you need to think through as you determine an automation solution and which one is right for you.

This is just a handful of questions and there are many more but these questions will help you think through and narrow down the right automation solution for you.

In conclusion, many people think that RPA will cut costs but actually research has found that it increases productivity and therefore departments can take on additional tasks and SLA's while removing the mundane tasks from humans and giving them more training and higher-valued responsibilities. Of the three categories outlined above, only the virtual digital workforce - a secure, scalable solution that interacts with systems the same way that users currently do, designed with both business and IT goals in mind - fits the profile of truly enterprise-compatible RPA.

Virtual Workforce Platform	Software Development Kits	Desktop Recorded Automation

Over the last few years the Robotic Process Automation landscape has changed with many adjacent technologies rebranding their solutions as RPA. As the London School of Economics research shows, there are three major types of RPA referred to as the "Three Lane Highway."

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