ROBOTIC PROCESS AUTOMATION

CRMT

BUSINESS CHALLENGES

Organizations focusing on cost reduction, operational excellence, and regulatory compliance might find RPA as a flexible, low-investment, less complex alternative to traditional solutions like outsourcing, offshoring, process improvement and system transformation.

WHAT IS RPA?

RPA (Robotic Process Automation) is a way to automate repetitive processes that are based on rules and are implemented in day-to-day business in the front and in the back office.

KEY FEATURES ARE:

It is an IT platform

Imitates human interaction with applications

Connects several independent applications

The virtual workforce is controlled by IT operations

RPA is agile and non-invasive, works with the existing IT architecture

BENEFITS OF RPA

- Very fast implementation, cost savings and ROI
- High flexibility and scalability
- Excellent audit and security
- Improved quality and accuracy
- Improved employee morale
- Better customer experience

USE CASES IN A COMPANY

AUDITING, FINANCE

Procure to Pay
Record to Report (GL)
Sales Orders

HR

Payroles
Incentives
Personal admin
Newcomers, Leavers
Contract management
Timesheet management
Compliance

CUSTOMER & REGULATORY

Account amendments across multiple systems
Policy migration from Insurer legacy systems to new applications
Claims management
Data gathering for regulatory and compliance requirements / remediation
KYC / AML authentication

GENERAL

Automated reporting from various systems (password reset, credentials granting and removing...)

RPA RED-FLAGS QUESTIONS

QUESTION	DESCRIPTION	YES	NO
Is the process well structured?	A process that can be easily passed on to the new employees.	○	○
Is the decisive logic very clear?	Decisions in the process must be well-defined and documented. It's not AI!	○	○
Is the work process defined?	A well-defined workflow is a great candidate for RPA.	○	○
Does the process include the use of several unrelated applications or tools?	In these processes, people transfer data between applications and/or tools (excel, pdf, web applications, core systems, ...)	○	○
Are subjective human decision-making or emotion-based decision-making excluded from the process?	Processes that require human judgment are not good candidates for automation. They can still be candidates for assisted automation, where the process is executed by the RPA, and the person takes the final decision.	○	○
Is the process subject to a person error?	In comparison with man, the machine does not make mistakes, thereby increasing quality, reducing the number and costs of complaints.	○	○
Is the process unique, repetitive, and boring?	The elimination of simple, repetitive processes raises employee satisfaction and enables a more rational use of human resources.	○	○
Is the workload high?	The greater the amount of work, the faster the ROI.	○	○
Is 24/7 required?	Such processes are ideal for automation. For example, approving credits, changing pin codes on cards, ...	○	○
Are the legacy applications or external portals included in the process?	RPA can also connect legacy applications and external portals. Example: a cashier in a shop where a customer is required to enter the legacy system, find the product insurance (insurance portal) and credit (bank portal) on the external portal. Integration of portals can be expensive and time consuming. The RPA is a great (and sometimes the only) shortcut.	○	○
Is a partial automation of the process sufficient?	The process can only be partially automated and still brings great benefits.	○	○

TASKS SUPPORTED BY RPA

The list of tasks that RPA can perform is very long and some examples are listed below:

- Opening e-mails and attachments
- Logging into web applications and operational applications (SAP, Navision, ... own development)
- Copy and move files and directories
- Copying and moving (on the screen)
- Filling screen masks
- Reading and writing from databases
- Reading data from web applications
- API calls
- Execution of calculations
- Reading and writing to Excel
- Printing documents
- Implementation of IF-THEN-ELSE procedures/logic
- Data transfer between applications and systems
- Extraction and data transformation
- Bulk e-mail sending (generating, archiving, extracting)

POC GUIDELINES

The most suitable processes for POC require 3-5 steps and run in 2-3 applications.
They improve high-added value, and the implementation is extremely fast (2-3 weeks to production).

CALL CRMT TO GET STARTED

CRMT can help with all activities related to RPA.
The solutions can be implemented on 3 different platforms:
IUpath, SoftoMotive and RobotiQ.ai

PROFESSIONAL SERVICES PROVIDED BY CRMT:

- CONSULTING AS TO WHICH PROCESSES ARE THE BEST-SUITED CANDIDATES FOR RPA

- PROCESS-MODELING AND FUNCTIONAL SPECIFICATION PREPARATION

- INSTALLATION AND CONFIGURATION OF RPA

- CREATING PROCESSES IN RPA

- MENTORING EMPLOYEES (ADMINISTRATORS AND DEVELOPERS)

- EDUCATION

- CREATING AN RPA MANAGEMENT METHODOLOGY (GOVERNANCE MODEL)

- SUPPORT (REACTIVE AND PROACTIVE)

CRMT d.o.o.
Ukmarjeva ulica 2
SI-1000 Ljubljana
Slovenia

FOR ADDITIONAL INFORMATION, PLEASE WRITE US AT:

INFO@CRMT.COM 🔍