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6 USES CASES OF ROBOTIC PROCESS AUTOMATION

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In this fast-paced, competitive and dynamic world, the need for speed is vital. Businesses want increased productivity with less resource, more cost savings and improved accuracy, to offer the ultimate customer experience. Customers increasingly expect an on-demand service with an instant response and service - anywhere and anytime they want it.

Many of the limitations to meeting such immediate, round the clock customer expectations, relate to the people-centric way services are delivered. As such, there has been a surge of interest in Robotics, Artificial Intelligence (AI) and process automation in recent years to address these challenges.

Some commentators express concerns at the impact, including the World Economic Forum, whose 2016 Davos Report forecasts “Disruptive labour market changes, including the rise of robots and artificial intelligence, will result in a net loss of 5.1 million jobs over the next five years in 15 leading countries.”

However, Forrester takes a more balanced and realistic view, stating “advances in automation technologies will mean humans increasingly work side by side with robots, software agents and other machines.”

In fact, with the global pace of change, organisations that continue to rely on manual processing will lose their competitive edge.

As process automation enables large volumes of tasks to be achieved quickly and accurately, and in turn reduces costs and improves efficiencies, Robotic Process Automation provides the foundation for significant competitive advantage.

It’s clear that Robotic Process Automation has the potential to add substantial value and improve customer outcomes - and the concept of Virtual Workers operating as part of a blended human and machine workforce is here to stay.

Analysts and influencers are saying that Robotic Process Automation is creating a second economy that connects the physical economy in invisible, concurrent systems to speed and optimize knowledge work. Some are calling Robotic Process Automation the biggest change since the industrial revolution.

EXECUTIVE SUMMARY

3 The Institute for Robotic Process Automation
Today, across the world, many millions of hours of staff in customer services, business support and operations are being consumed with mundane, manual, labour intensive activities. While much of the headline-grabbing may come from the concept of Artificial Intelligence and self-learning systems, the fact is that if these mundane tasks were automated, the benefits would be huge, with staff freed up to focus on higher value activities, improved speed and accuracy and significantly reduced costs. This is where Robotic Process Automation comes in.

Robotic Process Automation (RPA) is the application of automation software to carry out tasks and activities in applications and systems by interacting with them in the same way as a human. “Virtual Workers” replicate the specific actions a human would take while working with IT systems, the decisions they make, and the logical processes they follow. This might include interacting with an in-house application, website, user portal, email, Microsoft Office suite and more.

Furthermore, virtual workers work 24/7 at machine - not human - speeds. They are technology-agnostic, can use any system or device with a graphical or command line interface and can carry out any data-driven, rule-based process. As they are using (rather than replacing) an organisation’s existing technology, they are both completely complementary to core systems and entirely non-disruptive for day-to-day business. This makes RPA a capability that can be leveraged irrespective of industry and application, delivering ROI often within 3 to 6 months.

RPA is fast emerging as a disruptive technology solution capable of delivering multiple benefits. It is already having an impact at organisations currently deploying virtual workforces. In the next few years, RPA will become an essential tool for more and more businesses looking to reduce costs, enhance accuracy, increase scalability, boost productivity and increase compliance. The benefits are simply too significant to be ignored.

This guide looks at the various areas within a business where RPA can offer benefits along with some proven real world use cases where RPA has already delivered game-changing results for some of our customers. If you’ve ever asked yourself or others the question “why isn’t that automated?” then it’s highly likely RPA can help you.

Let’s get ready to automate.
SIX USE CASES WHERE RPA DELIVERS PROVEN VALUE

IT & Infrastructure Support
Customer Service & Support Desk
Data Migration & Management
Connecting Process Islands
Back Office Administration
Digital & Online Initiatives

www.thoughtonomy.com
Typically, call centres and service desks use a number of different systems and applications and often undertake a high volume of low complexity repetitive tasks. When someone calls in, service agents have to navigate these applications while at the same time managing their interaction on the call with the customer. If users connect via email or messaging systems, agents need to translate information from those systems while executing the required actions.

“Automating human activity can improve effectiveness and efficiency, whilst reducing cost and margins for error”

THOUGHTONOMY

But having to jump back and forth between systems and screens shifts is slow and inaccurate. In a live call, the focus moves away from the caller and the perception of the customer is impacted. Disparate systems may require the same information – who hasn’t experienced being asked the same identity verification questions multiple times by the same call centre? Additionally, post-call follow up, such as updating records and recording closure activity can take almost as much time as the call itself, thus negatively impacting upon agent productivity.

RPA can be used to automate many of the common tasks in a customer service or support desk, such as incident management, billing queries, user administration and updating records, to deliver many benefits. Not only can it ensure tasks run flawlessly and consistently during waking and sleeping hours and address and resolve problems on its own, it can link disparate systems and applications in one single console, build a unified knowledge base that delivers relevant data in real time, and automatically set up and run processes. Agents are freed from having to process repetitive, manual tasks and can focus on developing their customer-centric skills.

A good customer experience can drive long-term growth. Which is why customer satisfaction should be the ultimate goal of service desk and call centre performance.

And don’t forget, Virtual Workers can be many times faster than a person. This allows for a faster turnaround for customer requests and significantly improves SLAs.
Case Study:  
#1 Sector: Managed Services

**CHALLENGE**  
A leading European IT Managed Service provider was running a support service for a leading industrial customer who had a large number of employees and a broad mix of legacy and new applications. Handling over 15,000 calls a month, a significant amount of time was being spent by the 1st line support team executing user administration tasks. In fact, due to the complexity of the systems and processes, the average time for each such incident was almost 6 minutes, as the agent had to inefficiently navigate various systems to access, manipulate and update information, subsequently offering an inefficient service and poor customer experience.

**OUTCOME**  
Delivered within 2 weeks, the automated solution - provided through Virtual Workers in place of human agents – was able to complete tasks in less than 50 seconds – that’s an 83% reduction in execution time. Along with this improved customer service, the volume of support resource required has been significantly reduced and a number of support technicians have subsequently been redeployed, producing a tangible cost efficiency saving of an estimated €1M.

## RAPID DEPLOYMENT
- **2 Week Project**

## EXECUTION TIME
- **83% Time Reduction**

## PRODUCTIVITY SAVING
- **$1m Saved Annually**
IT & Infrastructure Support

Faster time to deployment

IT support staff are highly skilled, well trained and valuable resources. But many businesses see their IT Support team spending too much time manually undertaking systems administration tasks, running diagnostics and system checks, managing patch processes, backups and many other daily tasks and just do not have the time or the budget to increase head count to handle more high value, skilled tasks, or work on business improvement and change projects.

“Add ‘Virtual Workers’ to your IT team and release skilled staff to do the things that matter.”

THOUGHTONOMY

Companies can optimise their IT resources with the support of a Virtual Workforce®. Through either assisted-automation (automation with human support either to initiate or approve actions), or by fully automating (no human intervention) existing user actions and taking over labour-intensive administrative tasks, employees are freed up for more intellectually demanding activities.

By focusing on subjective decision-making, innovation and customer facing activity that can’t be automated, the IT team is far more efficiently employed and feel more professionally engaged. This Virtual Workforce® is of course available 24/7. They don’t make mistakes. They don’t deviate from the defined process. They never have a bad day. They work at machine speeds. And at busy times, in an instant more of them can be called upon to step in and take up the load. They are simple to deploy - often in areas where automation was previously considered to be unviable, and they are easy to manage with a significantly lower level of investment.

And above all, you can rest assured that the jobs are getting done - on time, consistently and accurately.

knowledge base that delivers relevant data in real time, and automatically set up and run processes. Agents are freed from having to process repetitive, manual tasks and can focus on developing their customer-centric skills.

And don’t forget, Virtual Workers can be many times faster than a person. This allows for a faster turnaround for customer requests and significantly improves SLAs.

“Robotic automation tools are up to 65% less expensive than offshore-based full-time employees”

Case Study:
#2 Sector: Technology

**CHALLENGE**
A market leading managed service provider was faced with the challenge of a new client needing a niche skilled support solution for its systems and applications. The complex management requirements for the new client’s systems left the IT provider with the prospect of having to employ expensive experts to run a 24/7 service operation.

**OUTCOME**
Virtual Workers were deployed to manage and automate the various complex, low volume system administration tasks around IT applications and infrastructure, including validation, regular testing, diagnostics and fault remediation. This replaced the need to recruit further highly trained staff to perform these tasks. The quality of the service delivered by the provider has improved vastly, with previously time consuming, yet critical activities now being executed more regularly, ultimately offering speedy system support. The solution not only delivered a better service, but also produced an estimated saving of £250K in staff costs compared to the use of offshore resources, or £500K compared to locally employed staff.

3 FTE Reduction

**EFFICIENCY SAVING**

24/7 Operation Time

**SERVICE OPERATIONS**

$250K Saved Annually

**PRODUCTIVITY SAVING**
Data Migration & Management

Efficiently and accurately manage data

Big data is getting bigger. More and more data is being generated across multiple sources and it’s getting tougher and more and more time consuming to manage, measure and analyse. And with this increasing amount of data available, manual processes and human intervention leaves a greater margin for error.

Many businesses today collate data from multiple sources, such as web pages for online orders, invoice workflow, email exchanges and Excel spreadsheets, effectively requiring individuals to log in and out of multiple systems, copying and pasting data between different sources and formats. Implementing RPA to automate these high-volume, low-complexity tasks can not only ensure **optimal resource utilisation** but also improve employee productivity. By replicating human data entry, RPA can be deployed to transfer, manipulate and migrate application and system data quickly, reliably and with a full audit trail, thus avoiding manual re-keying and re-entry and vastly **reducing the high instances of human error**. By removing this margin for error, the data becomes **100% accurate**, so the insights and subsequent business decisions are more likely to succeed. Deploying RPA can also enhance customer and supplier system integration as it provides an electronic interface to customer and/or supplier systems where a system to system interface is challenging or not possible.

“Replacing human activities involving transferring information between applications, spreadsheets, documents and systems removes the risk of error and increases process visibility.”

THOUGHTONOMY
Case Study:

#3 Sector: Business Services

**CHALLENGE**

This IT and Business Process outsourcer was providing a management service for one of its customers, recording all activities in its own case management application, a shared platform used across all of their clients. However, this specific customer required the information to be recorded in its own dedicated system too. Using the client’s case management application as well as their own was simply inefficient. However, the two systems could not be connected due to client restrictions, so the only way to get case information from the client system to the service provider system and vice-versa was to use people. By recruiting temporary staff and redeploying staff from other duties, 12 employees were assigned to manually rekeying the records from one system to the other. This slow process was creating a huge backlog of cases to be migrated and updated.

**OUTCOME**

An automated solution was deployed with Virtual Workers replicating the data from one system to the other, replacing the 12 staff with just two Virtual Workers and delivering work out of hours to minimise the overall customer impact. The backlog of cases was quickly cleared and the reduced cost of temporary staff saved the client around £200K in the first three months of operation.

**EFFICIENCY SAVING**

12 FTE Reduction

**SERVICE SPEED**

3 month Backlog cleared

**PRODUCTIVITY SAVING**

$250K Saved in 1st 3 months
Connecting Process Islands

Working together to work faster

It is not uncommon for end-to-end business processes to span multiple teams or departments within an organisation, or even externally into third party providers, partners or customers. Many find themselves with several islands of disconnected tasks, linked by inefficient handoffs and touch process flow. In some cases, the tasks themselves may already be highly automated, providing high efficiencies within the task, but ultimately these disconnected islands make it difficult to provide a fully optimised end-to-end flow.

Connecting these pockets of activity, or existing islands of automation, is the key to a fully automated end-to-end workflow and a more efficient business process.

RPA can provide the ideal solution to connect these islands and bring all the tasks together to deliver a fully automated and connected service to boost productivity, improve time to market and enhance customer service.
Case Study:
#4 Sector: Human Resources

CHALLENGE
A major offshore outsourcing firm with over 200,000 staff was struggling to manage its employee turnover process. With different employee details being held in a variety of disparate systems, the starters/leavers process was complex and inefficient. Parts of this process, such as payroll, user accounts and Staff ID were undertaken by HR, some by Security, some by IT, and some by Facilities. All these departments worked independently and completed their tasks in isolation making it a lengthy and complicated process, made worse by handoffs between departments being in the form of unstructured email, thus needing a great deal of data re-entry at each stage.

OUTCOME
An automated process was built to connect these islands of activity and deliver a fully automated end-to-end workflow process. The solution now takes information upfront via a simple secure web portal interface and initiates each activity sequentially or in parallel where possible. The steps are interrelated into a seamless workflow process and human error has been removed. As a result, the starter process has improved hugely, with a process previously consuming many man-hours of resource now executed with a minimal human touch. It also offers the added benefit of ensuring that employees who leave the organisation are immediately decommissioned from all associated systems and access rights removed has delivered immeasurable reductions in risk exposure.
Digital & Online Initiatives

Improving customer experience

High volume external consumer or internal user phone, email and postal based orders and requests are costly and inefficient, labour intensive and time consuming. Moving transactions and customer or user interactions online is a great way to deliver efficiency gains. With real-time automated execution via an online presence, accessible 24/7, organisations can reduce costs and vastly improve customer experience. For most organisations, the challenge to achieve this is that legacy management systems have not been designed for self-service and are unsuitable or impossible to offer to customers direct interaction.

With The Virtual Workforce® get your services online in a matter of days

THOUGHTONOMY

But with RPA, existing services delivered in existing applications can be taken online in just a matter of days. Using a web based portal to capture user requirements and display results and outputs, which seamlessly links to Virtual Workers who process requirements by interacting with existing applications and systems, means that services can be digitised rapidly and non-disruptively, and offered online without change to the underlying process or systems. And because those systems remain unchanged, the digitised service can seamlessly operate alongside the existing human one, to allow a pain-free transition between communication channels, or even to leave both in place to serve different user

Digitising services with RPA means any rules-based process can be offered for digital consumption and enables business to offer a multitude of online, self-service tools, including online request catalogues, customer service functions or citizen support for public sector organisations.
Case Study:
#5 Sector: Public Sector

**CHALLENGE**
This Public Sector organisation is responsible for managing the process for appealing penalties issued for parking violations. With 10.8M tickets issued annually, managing the processes associated with appeals involved high volumes of manual processes, paper-based transactions and exchange of information by physical post. Recipients of a ticket who decided to appeal would complete a form on the back of the ticket and post it, along with any evidence, to a processing centre, where the information would be scanned, validated and either processed or returned for more information. This was a labour intensive process requiring a lot of human intervention, the risk of error was high and the interaction using paper and mail was slow, restricting the flow of revenue to the point that the cost of processing each appeal was more than the revenue they received from the associated fine.

**OUTCOME**
A single web portal was deployed to provide an online appeals service, with tailored theming to reflect the relevant local authority, where users were able to quickly and easily submit their appeal online. As information is entered, auto-validation ensures the forms cannot be submitted incorrectly – thus removing the 12-15% rework associated with incorrect or incomplete forms in the manual process. Once submitted, a Virtual Worker is able to manage the appeal and processes it in the existing case management system, executing all of the required information gathering and evidence collection relevant to the appeal, before passing to an adjudicator for final assessment. This efficient process demonstrated a significant reduction in the costs of manually processing appeals and a **vastly improved citizen experience**.

![Graph showing efficiency saving, productivity saving, and customer satisfaction improvements](image-url)
Back Office Administration

Optimise back office resources for significant cost saving

Every organisation has routine tasks that demand accuracy and speed but don’t really require decision-making to accomplish. In fact, such repetitive processes – clerical, time-consuming and error-prone – can be a cause of frustration for employees, as well as a waste of precious resources.

RPA technology is designed to reduce or eliminate the need for people to perform back-office processes, such as those found in finance, accounting, supply chain management, customer services and human resources.

Using RPA, you can automate administration and reporting tasks with Virtual Workers as your back office admin team. These robots handle end-to-end processes, essentially performing any task that a human user would otherwise do manually. A robot can carry out any type of task which is assigned to it, performing it quickly and accurately - every time.

Automation is particularly useful for Finance and Accounting departments where they can automate accounts payable, accounts receivable, order management, invoicing, collections and reporting processes to work more efficiently. RPA also works well for Human Resources, to automatically handle activities such as payroll and absence management, starter and leaver processes and employee data management.

By eliminating repetitive and manually interactive processes, RPA drives efficiency, enhances productivity, consistency and accuracy. This enables companies to improve response time to new markets and adhere to global regulatory requirements.
Case Study:  
#6 Sector: Financial Services

**CHALLENGE**

With over 300 staff using a legacy mainframe application to manage the savings and investments for over 400,000 people, this organisation’s customer service operation was struggling to cope with its inbound customer requirements. Due to restrictions in the 18-year-old system, processing cases often required the use of Excel spreadsheets containing complex business rules, so handling the volume of requests from customers such as policy holders and independent financial advisers – such as updating details, accessing beneficiary details or calculating lump sum payments – was extremely manual and complex with **handling each case taking an average of over 20 minutes.**

**OUTCOME**

Virtual Workers provide automated execution of customer services activities, reducing average execution times from over 20 minutes to just 2 minutes. Actions can be initiated either by customer services agents or directly by customers or financial advisers in a simple web portal customised for each user type. Alongside process efficiency, the instances of human error have been removed, improving accuracy – a vital factor in a regulated financial services environment. With 10x faster execution, customer experience is streamlined, and service staff are free to offer improved customer interaction. **The organisation has estimated productivity improvements of circa £1.5M annually, and an ROI in less than two months.**
WHAT CAN RPA DO FOR ME?
Delivering Digital Transformation where it matters

RPA allows work to be done much more quickly and accurately, reduces costs, improves efficiency and lays the groundwork for an improved customer experience. In the near future, we will see machines taking a more active role in enhancing human endeavours and renovating the customer experience with RPA will become a digital priority.

BENEFITS OF RPA

- Increase Efficiency
- 100% Accuracy
- 24/7 Productivity
- Improve Customer Experience
- Enhance Visibility
- Improve Time to Market
- Compliance with Regulations
- Faster Digital Transformation
- Reduce Costs
- Speed up process time
- Boost Scalability
- Optimize Resources
Today, companies in many sectors are already applying RPA, in order to transform customer services, financial performance and improve compliance. They expect RPA to drive productivity by automating transactional tasks and to increase profitability by gleaning relevant business information from unstructured operational data.

Robotic Process Automation is expected to save companies 50-70% on labour costs by making intelligent use of resources, near-zero error rates, improved compliance and reduced process cycle time. And RPA doesn’t always mean redundancy. RPA allows employees to focus on only jobs humans can do; strategy, creativity and connecting with people.

The key to delivering rapid automation success is finding the right balance between technology and skilled staff. With Virtual Workers managing structured process execution, human resources can be focused on activities that add greater business value. That’s better for staff, better for business efficiency, and also provides an improved customer experience.
ABOUT THOUGHTONOMY

Our belief is that deploying automation should be easy. That’s why our technology focuses on automating the way your staff work today. It’s not a replacement for the tools or systems you use, it’s an automation platform designed to fit in to your processes and systems in place of manual activity. No process re-engineering, no tools replacement, no integration, no coding and no big change programs.

Our SaaS automation platform takes the support and business processes and the system and tools interactions typically performed by humans, turns them into automation procedures and delivers them using Virtual Workers who emulate human staff. The Virtual Workers are “trained” how to use the systems and applications, procedures are replicated in process workflows, and the virtual workforce will execute them on demand or against a predefined schedule.

Thoughtonomy is the leading global provider of RPA Software As A Service and has automated many process across sectors including Technology, ITO/BPO/Finance/Telco/Public Sector and Healthcare, including the largest scale and fastest deployment of RPA to date (accurate as of June 2016).

Thoughtonomy – accelerating automation.

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