

EPAM CONTINUUM

WHITEPAPER

Five Keys to Delivering **Groundbreaking Results with Intelligent Automation**



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INTRODUCTION

Intelligent Automation. Hyperautomation. Robotic Process Automation. Machine Learning.

There are many buzzwords in the market, but how are these technologies making an impact?

Let's look at a real-life example of filing an insurance auto claim. In many cases, you're referred to an app where a friendly adjuster joins a video conference and walks you through the process of taking pictures and submitting a claim. Answer a couple questions, provide your electronic signature and off you go – your claim is submitted in 10-20 minutes complete with an email summarizing your interaction. Compare this to a two-and-a-half-hour (plus!) process that used to involve an average of three calls with an in-person meeting—time spent by both agents and the customer.

Behind the scenes, image recognition and business process management technologies manage and aggregate the data, providing granularity and transparency to operations staff and customers. This process enables real-time risk rating and decisioning; at the same time, the system continuously learns and improves. More complex decisions are left to employees, increasing job satisfaction and customer experience through instant gratification.

Developing truly fast-paced, dynamic and interconnected teams—that are enabled by technology, instead of the other way around—is the ultimate goal. The power of intelligent automation (IA) is in unlocking the 'future workplace' where decisionmakers are empowered to do what they do best in near real time.

As ambitious as these outcomes seem, the key to success lies in building a foundation of networked project teams—where people are empowered to implement complex solutions and fulfill requirements in **data, strategy and measurement, methodology, knowledge and user experience**. Instead of focusing on the tasks themselves, it is important to understand how people can perform successfully in these areas. At the heart of it, *people* are key to making everything work!



Common Barriers to Delivering Real IA Results

To date, many organizations have given system integration partners virtually unlimited capabilities and placed the majority of time-consuming manual work in a process improvement backlog. After what feels like a lifetime of chasing RPA use cases and targeting opportunities based on quick delivery timelines and simplicity, companies have gotten in their own way—essentially blocking these capabilities from driving significant impact.

Automation leaders have quickly recognized that their playbook must mature, and in recent years, the industry has started to evolve into the next phase. Seemingly each week, new and emerging methodologies have started spotlighting advanced technologies and tools in the market to support end-to-end automation projects. These tools focus on process and task mining, coupled with the commoditization of machine learning, computer vision, document processing and no-code (drag and drop coding wizards for programming). And with these new tools, a new wave of now popular concepts have emerged (hyperautomation, smart process automation and artificial intelligence, to name a few). Ironically, these concepts are centered around solving many of the same problems at the core of every process: mining accurate data and aligning people with optimized process value chains to develop intelligent solutions. You can build and deploy new tools and technologies with snazzy names, but are you actually achieving results or running into the same challenges as before? The point is that even with the latest and greatest technology advancements, progress continues to be stifled by barriers rooted in enterprise culture, personal biases, lack of the right talent and short-sighted focus on value.

According to Gartner *'4 Steps to Automation Success in Financial Services,'* "automation technologies and packaged solutions can provide tremendous capabilities to a bank, investment firm or insurance company. However, the organization's success will fall short of the potential if it does not have a clear view of the needed outcome or adopts a 'plug and play' approach."¹

In this adventure of bringing businesses further along their automation journey, most leaders have built an understanding of the outcomes and underlying activities that follow automation projects (e.g., discovery, design, deployment, delivery and support). But in order to successfully drive your ambitious transformational outcomes, you must focus your time and investment on forming the right teams that can break down boundaries between IT and business, eliminate personal and cultural bias, and drive innovative solutions using the latest technology.

¹ Gartner, 4 Steps to Automation Success in Financial Services, Laurie Shotton, Nicole Sturgill, 1 February 2021.

Key #1: Leveraging Data to Identify & Solve True Business Problems

At the core of any IA effort is the ability to set up teams of automation solution experts designed to solve real problems that justify having a given process in the first place. Teams must analyze the process end to end—across multiple silos—and identify the point of manual work inception (often end customers of the business).



KEY 1

The process design must start with using data to identify and solve a true and real business problem. This is the first key, which is often missed.

If the data used to define a solution is incomplete or lacks proper scope, you'll encounter significant shortcomings, which translates to budgetary constraints and shortcuts (technical debt and manual workarounds). All too frequently, teams limit their scope prematurely and focus on a subset of a problem due to lack of information and excessive ambiguity that stems from missing or inefficient channels to exchange gathered information. In fact, a global survey reported that 39% of organizations did not get expected cost reductions from RPA due to limited scope and data collected around solutions.²

New tools focused on team-based social platforms for people in organizations to collaborate, generate documents, track and analyze ideas can significantly reduce ambiguity surrounding automation projects by providing a 360-degree view of the problem. At the end of the day, without the right level of transparency around problems and channels to ensure this data is understood by the solution team, the odds of missed opportunities are high.

² <https://www2.deloitte.com/us/en/pages/operations/articles/global-robotic-process-automation-report.html>

Key #2: Strategizing for Measurable Outcomes

Yes, developing an effective enterprise strategy with a focus on long-term business planning is key; but a strategy that does not drive general clarity and align people has a much higher chance of looking like the “hairy back reality” described in Hockey Stick Dreams, *Hairy Back Reality*.³

Measuring an outcome is how leadership lays tracks for their teams to succeed. Sometimes, however, to justify a business case for process improvements, companies ‘bake a pizza with so many toppings’ that the intended results are no longer measurable. This leads to a loss of focus and lack of desired impact. While the projects do need to remain agile and flexible, your ultimate outcome must always produce real and measurable results aligned with the overall strategy. The goals for these results must be balanced and focus on specifics that align with the strategic vision of a company. Meanwhile, objectives that involve curbing support for growth spending, excessive break-even requirements or focus too much on full-time equivalent (FTE) reduction often send teams on a hunt for a ‘pink elephant.’ Reductions in FTE often result in diminished morale and set up premature organizational change management (OCM) walls. (Process owners avoid commitment to any significant benefits and ideas that can truly lead to groundbreaking results, for instance.) When it comes to automation, remember that the same rules that govern employee engagement apply to project teams and their outcomes.

Engaged employees show an increase in production and profit of

~20-40%⁴

Less than 25% of leaders have an employee engagement strategy, but engaged employees are

2.5x more

productive in generating revenue⁵

Top sources of workplace stress are a heavy workload/looming deadlines (33%), unrealistic expectations of managers (22%), coworker conflicts (15%) and attaining

work-life balance (22%)⁶

³ <https://www.mckinsey.com/business-functions/strategy-and-corporate-finance/our-insights/the-strategy-and-corporate-finance-blog/hockey-stick-dreams-hairy-back-reality>

⁴ <https://www.gallup.com/workplace/242096/focus-people-strengths-increases-work-engagement.aspx>

⁵ <https://www.themuse.com/advice/10-shocking-stats-about-employee-engagement>

⁶ <https://www.employeebenefitadviser.com/news/workplace-stress-taking-its-toll-on-employees>

Key #2: Strategizing for Measurable Outcomes

On the other hand, poorly-sized benefit projections can force teams to cut capacity and stretch resources due to overcommitment. This reduces the quality of results and can have significant indirect downsides.

Few employees want to focus day in and day out on the same mundane tasks rather than high-value activities. A new study from UiPath, in partnership with The Economist Intelligence Unit, shows that 42% of executives believe providing education and reskilling opportunities are very important to smooth implementation, and many executives see retraining their employees as key in their OCM strategy of integrating automation. You need to consider how your proposal for automation is presented to your employees and the organization at large. In the same UiPath study, 91% of C-suite leaders noted that focusing employee attention on fewer repetitive or mundane tasks was a huge benefit of automation.⁷ Automation can be a 'win-win' for employees and organizations when it is designed to reward your valued staff with meaningful work.

Although more complicated, focus on measuring true business impact in terms of both process efficiency and productivity. Consider how you can improve your process designs that propagate across departmental silos. Rather than simply focusing on payroll, some businesses define a measuring unit of transactions that represent direct impact to the bottom line and provide a common measurement unit across projects. That measurement should represent all aspects of claimed benefits (quality, sales, cost avoidance, etc.) that can be allocated across every area involved in a project. This method provides granularity and performance tracking as opposed to looking at headcount, which is not always reflective of the savings. A headcount-focused approach ignores the context—implicit tasks, knowledge or expertise that individuals carry are rarely examined.

Measuring the indirect impact of cost reduction is notoriously difficult. For example, have the sales plummeted due to lack of demand, or due to a reduction in service quality that undercut the demand? Applying agile principles coupled with OCM and workforce enablement can make your organization more successful. Put another way, establishing metrics that focus on business growth and productivity may position you for much greater outcomes.

Some companies identify strategic areas that could benefit from additional talent and define growth trajectories (lift and shift) for roles enhanced by automation, retaining the knowledge and building morale in the process. Other companies identify productivity improvement (e.g., 30% increase in transaction processing per FTE) as a key metric.



KEY 2

Measuring success that sets clear goals and desired outcomes for all members of the project team fosters active participation. This is the second key to delivering successful results with IA.

⁷ <https://www.uipath.com/newsroom/new-study-shows-adoption-of-business-automation-technologies-is-driven-by-the-c-suite>


Key #3: Following a Well-Defined Methodology

The path to IA success is a transformative journey that begins with the well-defined strategic components described above followed by clearly articulated tactics. Remember, IA projects should be built around people and underlying business processes, not technological capabilities. By thinking about technology from an orchestration perspective, IA can constantly evolve, weaving new tech tools in the mix. This ever-changing environment requires teams to build process designs that are both flexible and resilient. The design must anticipate not just the business changes, but advancements in technology, which need to be swapped out (like a new engine) without requiring complete replacement the entire project (or car). These are the deliverables that form the backbone of business transformation.

The process improvement and solution implementation methodology must be architected first. All organizations vary in complexity and culture, metrics and technological maturity. While automation vendors and system integrators have a standard method, you must optimize the method to establish reliable steps that do not require teams to spend months producing PowerPoints or crossing off tasks from a standardized list of deliverables that bears no value on the end result. Your method should define a clear problem statement and provide deliberate tactics that solve the business challenge and utilize the team in the best way possible. To do so, define frameworks and test scenarios that guide your team through the optimal level of detail and requirements around quality of data. Keep in mind that the result of poor methodology is underlying data that either lacks quality or is irrelevant to the problem itself. According to Workamajig, the top four reasons for failed projects include:

Change in project objectives (37%)	Inaccurate requirements gathering (35%)	Inadequate vision (29%)	Poor communication (29%)⁸
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A poorly defined methodology could result in perpetually missing the mark on benefit projections or wasted time on non-value-add activity. Alternatively, a well-established methodology is the guardrail to drive outcomes (as long as it is designed to be repeatable and improve continuously). Like the processes being improved, your methodology should be developed with design thinking and direct capture objectives (DCO). Most importantly, it should be formed around people at the core—fostering empowerment, recognition, engagement, adoption of the new technology and connection back to the enterprise strategy.



KEY 3
A well-established methodology that enables and empowers teams to drive significant and strategic outcomes is the third key to IA success.

⁸ <https://www.workamajig.com/blog/project-management-statistics>

Key #4: Evolving Knowledge & Capabilities

Hitting a nail on the head with a hammer is an easy task, but doing the same with a rock? Not so much. Almost always, there is a better tool for a job and optimal solution to a problem. Achieving the right outcome is a balancing act between business objectives, resources, stakeholders and technology. While often difficult to achieve because of resource constraints, teams should still strive to build an understanding of the 'art of possible' and use that understanding to identify optimal solutions – even if they do not ultimately satisfy top-level objectives – and follow up with a plan to break through identified barriers in the long term. Instead, teams too frequently run with the assumption that they should only employ the least complex solution because the 'art of possible' is not an option, leading to successful projects on paper, but sub-par results long term. If you have a number of competing priorities, teams might work with the wrong tools or integrate platforms that are not designed to solve the identified issue. The wrong technology creates significant technical debt, business continuity risk and bloated operating expenses. Too often, the capabilities of RPA are exaggerated when applied to highly complex solutions, leading to inflated expectations or chains of failed projects. For example, RPA implementation is often accompanied by claims that low-code capabilities can turn business users into programmers without requiring in-depth technical knowledge and that an RPA platform is the only component needed to automate a process. While true for very simple cases, this statement, applied to high-complexity problems, is a recipe for setting teams down the wrong path. Without an understanding of key technical concepts, knowledge of tools and their uses, or proper oversight, RPA can cause strain on systems, create security exposures and result in unforeseen operational fallout in the midst of nonstandard business cases. A process design that accounts for the scale and complexity of a solution requires a balanced team that can identify risks and ensure that they are properly addressed.



KEY 4

Enabling the evolution of existing technological capabilities, frameworks and toolsets that match the technical acumen of the team is the fourth key in realizing the benefits of IA.

A business expert who does not possess in-depth knowledge of available tools is unlikely to leverage the best capability in the toolset, just as a technologist who does not have hands-on business process experience will be unable to envision the best path to optimization. In addition, diversity of backgrounds—and most importantly, thought—can help eliminate preferences that are innate to humans. As individuals, we go through life with certain beliefs and passions that produce natural biases. Agile methods teach us that the right result requires multiple iterations, as well as direct dialogue that encourages teams to learn as they go and create a productive conflict. A well-balanced team can put these beliefs to good use and continuously reexamine the way problems are solved by delivering well-rounded solutions. Ensure that team roles are adequately integrated into design teams and provide balanced role hierarchies so you can eliminate personal bias.

Key #5: Building Empowerment via User Experience

User experience is like the taste of water—you only notice it when something is off. By now, we know that a project done in time and on budget does not always translate to success; but a project, platform or app that is loved by users drives results. Have you ever found yourself on hold for two hours listening to explanations of 20+ options that don't apply to your case? Almost everyone has experienced this, and anyone who has is well aware of how frustrating it can be. The value of a seamless, engaging customer experience is priceless. IA can provide instant customer satisfaction channels, and the benefits don't stop there.

A study done by Bizagi asked organizations: What was the most important reason for undertaking process automation? The results show that 55% of organizations tied their goals to value coupled with customer experience.⁹ IA highlights that customer experience, but goes beyond the point of direct customer interaction. Indirect factors like fulfilment speed, quality and long-term value are what can ultimately make the difference between great and poor customer experiences. The process and solution should always be analyzed as a value chain that begins and ends with the customer. Additionally, employee user experience is equally as important as the experience of the customer. Well-developed systems minimize the length of training required and drive up productivity, leading to a direct increase in value per dollar spent. On the contrary, a lack of focus on employee user experience can lead to short-term improvements that slowly die off as users find ways to bypass unproductive user interfaces or identify easier workarounds.

Well-connected, flexible and resilient processes designed to enhance the user experience guarantees long-term results that continuously build up value. Focus on solutions that enable greater functionality and provide productive, clean ways to complete a full array of business activities in a single channel (or user interface).



KEY 5

Embedding user experience principles into solution design and methodology is the fifth and final key to IA success.

⁹ <https://go.bizagi.com/rs/741-TEJ-653/images/Bizagi-IW-Process-Automation-2020.pdf>

Conclusion

The old mantra that great projects only happen with great people remains true for IA. Ask yourself: Is my organization biased toward old systems or cultures? Are we focused on building networked teams that feel empowered to experiment, iterate, fail quickly, pivot and ultimately deliver on ambitious objectives?

In this digital age, we'll always compete for instantaneous value, and the opportunities for technology to deliver greater customer-facing services will only expand. IA can only enable the greatest outcomes when each process provides direct value to customers and employees alike. These outcomes require an unflinching focus on accurate data; strategic alignment and measurement; agile decisioning; people, process and technology optimization; and full-scale user engagement. Companies who adopt people-focused approaches with sufficient OCM integration will find their journey much more fruitful—and that much more enjoyable.



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