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WHAT IS YOUR BOT VISION?

When and How to Scale Robotic Process and Cognitive Automation

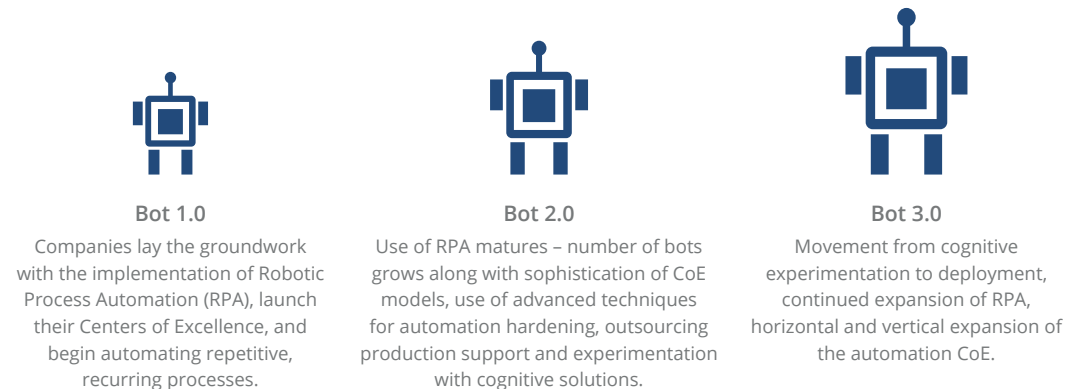**Mark Davison and James Manos**

INTRODUCTION

To become truly digital companies, enterprises today need to move from Bot 1.0 to Bot 3.0.

Many companies have accomplished Bot 1.0. They've assessed the need for and implemented their first wave of bots. They're tracking and measuring the results – and they like what they see. Their initial investments are paying off.

But to become truly digital companies, enterprises today need to get to Bot 3.0. That is, they need a digital platform with a framework that allows them to scale – and to coordinate automation initiatives across an international or possibly even global footprint. They need to extend adoption both horizontally and vertically across their enterprises and reach across corporate functions such as supply chain, IT and HR. To achieve additional benefits and further strengthen the broader business case, enterprises need to update their "bot vision" to include cognitive automation and analytics, and continuously improve how they use automation to support both IT and business goals.

Want to know what the future of automation in business looks like? The graphic below depicts the phases of growth.

Figure 1: Bot 1.0 ... Bot 2.0 ... Bot 3.0

Bot 1.0
Companies lay the groundwork with the implementation of Robotic Process Automation (RPA), launch their Centers of Excellence, and begin automating repetitive, recurring processes.

Bot 2.0
Use of RPA matures – number of bots grows along with sophistication of CoE models, use of advanced techniques for automation hardening, outsourcing production support and experimentation with cognitive solutions.

Bot 3.0
Movement from cognitive experimentation to deployment, continued expansion of RPA, horizontal and vertical expansion of the automation CoE.

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Your "bot vision" – what your business will look like at Bot 3.0 – should be documented in a living strategy document that can be revised as needed.

While a strategy and implementation plan to scale automation throughout the organization accelerates savings and benefits, developing one isn't as simple as merely extending the technology and expediting deployment. For example, suppose an organization has been deploying one bot per month. Scaling up means it needs to deploy 50 bots per month. If the goal is to reduce costs, improve productivity, reduce errors and improve compliance – largely the main objectives for automating in the first place – then the operating model must evolve to support the ramp-up in defining, designing, configuring and deploying the technology, as well as doing the important work of preparing employees for the inevitable changes in processes and organization.

Your "bot vision" – what your business will look like at Bot 3.0 – should be documented in a living strategy document that can be revised as needed. The strategy and implementation plan should encompass all aspects of automation (e.g., RPA, autonomics and cognitive) and be organized in three phases: setting the context, establishing a vision for the future state of automation and developing a strategy to make it happen.

Setting the Context

Assessing the current state of automation across the organization and documenting your automation experience to date will help you get a handle on the here and now: what are you using in terms of organizational and governance models, technology, metrics and key performance indicators?

To understand how the current automation implementation drives value, detect and measure specific ways the current operating model has been effective. Ask yourself how well your automation implementation is aligned with your business and technology architectures and imperatives. Consider the agility of your organization; how fast can you realistically move?

The answers to these questions will reveal where successes have been achieved and where gaps exist when considering how to evolve the current state to the desired future implementation under consideration. It will also give an indication of what additional automation approaches and technologies may be in-scope for the future state. For example, if there is still value to be realized by automating email processing, it may now be time to look at cognitive options for realizing new value from the related unstructured data.

Establishing a Vision for the Future State

Leveraging automation can achieve speed, quality and effective use of resources throughout operations, but it also can benefit customer and supplier needs, business transactions and supply chain success. Consider how your automation needs line up with your business imperatives. What operating model, governance and infrastructure requirements are needed for your future automation plans, and how will they be impacted by automation? What is the role of business and IT – along with other functional and geographic roles? What CoE roles and responsibilities will be needed? Use this discovery process to help you build your future operating model and business case.

What is Your Bot Vision?

Your Bot 3. 0 should be defined by the following:

- Automation implementation across the global organization and entities
- Enhanced operating model structure, roles, responsibilities, accountabilities, staffing levels and skills and expertise needed
- Improved governance framework and best practices for adopting a global model
- Advanced approach to automation by moving from RPA into autonomics and cognitive
- "Next" best practices, processes and techniques to leverage business and technology assets
- Major impacts on the enterprise and potential investments that need to be made
- Key issues and challenges, which most often take the form of
  - Building a business case with support from leadership
  - Identifying mature and stable processes suitable for automation
  - Finding the right human, financial and technology resources to do the job
  - Determining readiness for change
  - Aligning with IT
  - Prioritizing, funding and allocating resources and infrastructure

The graphic below depicts a roadmap for scaling from Bot 1.0 to Bot. 3.0.

Figure 2. Strategy: The Roadmap to Scale from Bot 1.0 – Bot 3.0

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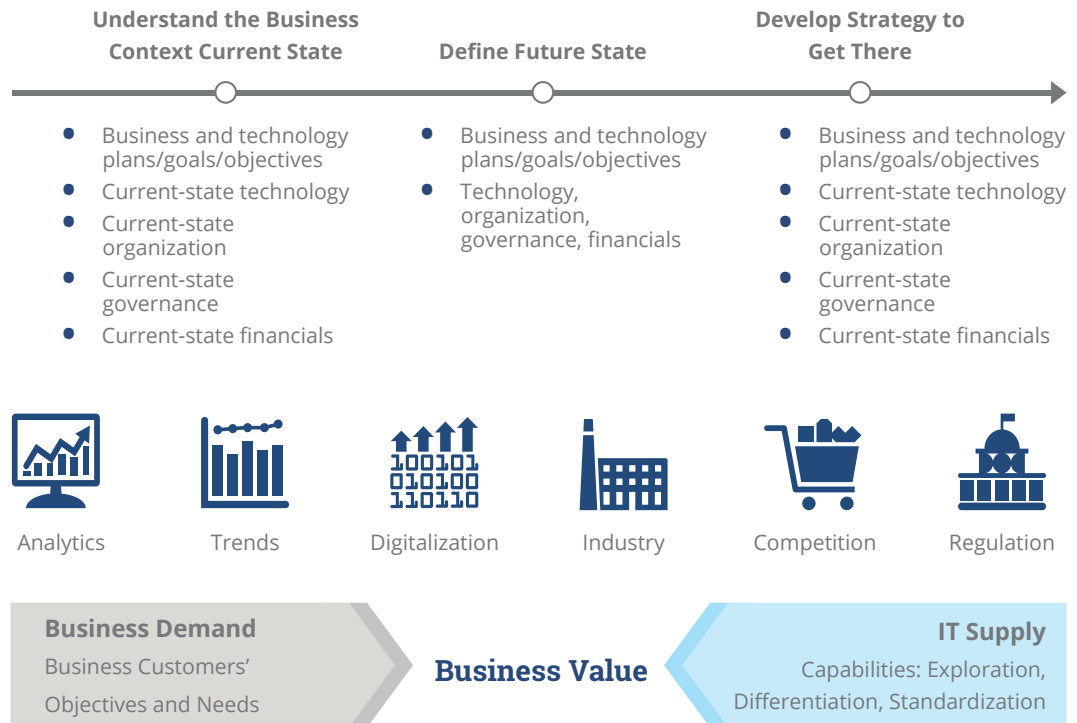
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Develop a Strategy to Make it Happen

For a company to scale up its automation program in any significant way, it needs a high-level, multi-year plan for selecting, rolling out, configuring, deploying and maintaining the right automation technologies. An important step in developing a strategy to get to Bot 3.0 is to create a global automation solutions team that can support delivery effectiveness and ongoing production support.

Global automation solutions teams are high-performing, cross-functional teams of automation analysts and builders who focus on process automation and conduct global, regional and local automation training. Agile coaches can provide training and consistency in agile methods, so automation teams achieve their desired results.

An important step in developing a strategy to get to Bot 3.0 is to create a global automation solutions team that can support delivery effectiveness and ongoing production support.

Organization

Governance

Strategy

Technology

Best Practices

Standards and techniques leveraged across the automation solutions teams minimize support costs and optimize resource allocation to configuration and deployment. The teams continuously seek regional and local market expertise and replicate, develop and expand capabilities while creating services targeted to what's new and what's next.

To coordinate globally, automation solutions teams must use time zone overlap to resolve issues and share product and domain knowledge. Opportunities for team members to travel for face-to-face meetings and rotate between geographies can enhance collaboration, rapport and trust to enable true global teamwork. Appropriate governance helps resolve conflicts and issues and ensure alignment of practices and procedures.

Conclusion

Solution providers such as Automation Anywhere, Blue Prism, IBM Watson and others are creating a lively market of robotic process automation and cognitive capabilities. An enterprise-wide automation environment that includes RPA, cognitive and analytics initiatives requires a multi-tool, best-of-breed solution environment and operating model.

Before creating your bot vision and launching Bot 3.0, secure the following top 10 prerequisites:

An enterprise-wide automation environment that includes RPA, cognitive and analytics initiatives requires a multi-tool, best-of-breed solution environment and operating model.

1. Executive sponsors who will participate at designated checkpoints in the project

2. Executive steering committee that will meet monthly or more frequently during the project to assure cooperation and coordination, monitor progress, ensure timely decision-making and resolution of issues, and approve and allocate resources

3. Business project manager and team leads who are empowered to make decisions

4. Dedicated program resources assigned to the implementation team

5. Identification of "quick hits" to realize savings to fund the program

6. Global program workstreams that focus on program management, governance, operating model, automation solutions team extension and OCM

7. Technology and access to systems and applications required and available as needed

8. A phased approach that leverages best practices for rapid process assessment, design thinking, training, automation deployment and production support

9. A targeted methodology for accelerating automation configuration/deployment

10. Scorecards at the global and local levels to track savings toward goals.

If you have not begun to develop your bot vision, you can be sure your competitors are. They are working behind the scenes to accelerate their path to Bot 3.0, create better cost models and develop leaner and more agile organizations. ISG helps enterprises define and achieve their Bot 3.0 vision strategy. Contact us to discuss how we can help you.

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MARK DAVISON

Mark Davison is an experienced consultant and former CIO with more than 30 years' experience in process automation, information technology, sourcing, supply chain management, transformation and acquisition integration. His consulting experience includes work for well-known firms such as Coopers & Lybrand, Deloitte and AlixPartners. His industry experience includes acquisition integration, supply chain and IT roles in the banking, manufacturing and distribution industries. He has held CIO positions for nationwide distribution, retail, media/publishing and textile firms.

JAMES MANOS

James Manos is a director in the ISG Robotic Process Automation Advisory group. He has 25 years' experience in enterprise application architecture, integration and process automation. Most recently, James was a Senior Director for Oracle Corporation, where he spent 10 years, serving in multiple roles including sales consulting, marketing, product development and enablement for the Retail Global Business Unit. Prior to that, James served as CTO for Noteworthy Medical Systems, Superior Edge and Active IQ Technologies, where he focused on product and organizational transformations.

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