Work Like Tomorrow.™

START YOUR INTELLIGENT AUTOMATION JOURNEY WITH RPA & PROCESS INTELLIGENCE

HOW TO DIGITALLY TRANSFORM THE WAY YOU WORK IN SIX SMALL STEPS

KOFAX

CONTENTS

INTRODUCTION

Every achievement begins with a small step and a big plan. From Neil Armstrong landing on the moon to Tenzing Norgay and Edmund Hillary's first steps upon the summit of Mount Everest, mankind has always taken great, daring leaps in exploration and innovation. Moving from inefficient ways of working and doing business to big results and big-picture thinking can sometimes seem like an insurmountable task. But, you can start with a few small steps.

Companies are facing an onslaught of new challenges and trends, ranging from disruptive competition to mobility developments, increasing regulatory requirements and stringent cost controls.

Continuing to do "business as usual" is a landmine for any organization in any industry. Manual tasks that rely on hiring more staff hinder scalability and slow down business growth, and take a significant toll on the day-to-day operations of your business.

The good news is that new approaches and emerging technologies, such as robotic process automation (RPA) and process intelligence, are helping business leaders to confront these challenges head-on.

RPA and process intelligence are transforming the way organizations operate, innovate and grow their business. From streamlining workflows to identifying bottlenecks and eliminating manual, repetitive tasks, these cutting-edge technologies are turning small shifts into big results. And, as many organizations struggle with visibility into their processes and pinpointing where inefficiencies lie, these technologies are quickly establishing an important foothold in the business landscape.
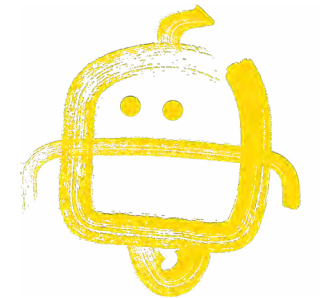
ROBOTIC PROCESS AUTOMATION

The Institute for Robotic Process Automation defined it as: "The application of technology that allows employees in a company to configure computer software or a 'robot' to capture and interpret existing applications for processing a transaction, manipulating data, triggering responses and communicating with other digital systems."

PROCESS INTELLIGENCE

Process intelligence extends business intelligence to help an organization understand what is really happening within the context of its processes. Process intelligence links data obtained through systems of records and separate process management environments to specific steps for an end-to-end view of entire business processes. This powerful combination of data provides the insight necessary for everyone in the organization to understand how well processes—and more importantly, the operations they represent—are working.

With the top priorities of executives in mind, we've developed this eBook to help you improve your business operations and transform key processes in six easy steps.

You'll learn how to move from small to big—from small, manual tasks and repetitive, time-consuming ways of working to achieving big results in line with big-picture thinking. We'll examine how you can take small steps to make giant leaps in productivity and profitability through the use of RPA and process intelligence.

HERE, YOU WILL DISCOVER THE STEP-BY-STEP JOURNEY TO:

- Rid your organization of manual minefields and information silos.
- Free your workers to focus on knowledge work rather than manual, repetitive tasks.
- Identify potential pitfalls and anomalies before they materialize.
- Uncover dark processes and process optimization opportunities.

Read on to discover how RPA and process intelligence can help your business see big changes and big results. It's simpler than you think.

TAKE THE DIGITAL TRANSFORMATION QUIZ

Do we really understand how our processes and workflows work?

How can we better process documents to improve business outcomes?

Are our processes meeting our customers' needs and expectations?

DID YOU KNOW?

Executives said their top priority between now and 2025 is continuous process improvement.[1]

[1]Driving Back Office Efficiencies, Deloitte

WE HAVE MACHINES FOR THAT NOW, YOU KNOW

Every enterprise organization is under immense pressure to improve all aspects of its operations, yet many still rely on manual tasks for vital business processes, such as collecting, reviewing and inputting information between enterprise systems, websites and portals. These repetitive, remedial tasks require your employees to log in and out of multiple systems, copying and pasting data between different sources and formats, and manually apply rules and checks along the way.

Labor- and time-intensive manual tasks are a serious drain on productivity and operational performance. And, in addition to being mind-numbing work, manual tasks are also notably inefficient and inaccurate, especially when compared to the predictability of automated work processes.

In the logistics sector, 15% of respondents in an Edge Research study said, "Manual processes are holding back our ability to handle business growth and the associated transaction volume."

The banking industry faces similar issues. A McKinsey[2] report found that in one bank, "more than 70% of the applications were paper-based, and of those, 30—40% contained errors and required reworking; applications often got stuck in one data-verification step for more than five days before being processed; and because of a lack of any IT integration, branch and back-office staff had to enter data manually from several systems into the workflow."

DID YOU KNOW?

Out of every 100 steps, a human is likely to make 10 errors, even when carrying out somewhat redundant work.

Twenty-two percent of the average employee's time is spent on repetitive tasks.[3]

Error rates in data entry and data duplication in healthcare records can be as high as 650 per 10,000 fields[4], according to NCBI. Indeed, these problems exist in all industries, with outcomes typically resulting in reduced productivity and profitability.

Mind-numbing manual work also leads to employee disengagement and low morale. When combined with a lack of process standardization and visibility, this becomes a veritable manual minefield for companies. According to Gallup, "Worldwide, only 13% of employees working for an organization are engaged. And, in the U.S., only 32% of employees are engaged—meaning they are involved in, enthusiastic about and committed to their work and workplace[5]."

Manual tasks, combined with marked employee disengagement, lead to frequent errors, rework and exception processing. "Latent organizational weaknesses include work processes, and such work processes usually are behind human error. Why did the error occur? The procedure wasn't followed. Why? Human error. Why was there human error? The work process needs improvement."[6]

Process intelligence requires more than access to relevant data and metrics; it also requires an understanding of what the data means in the context of its processes.

According to Gartner[7], "Task-level automation, such as RPA and the use of IoT capabilities, can deliver great success in a very short term. But implementing these initiatives without understanding the process or operational context sometimes makes these initiatives lose their relevance."

The biggest catalyst for optimizing processes and improving performance? Insight. Without deep visibility into business processes, it's impossible to create a continuous feedback loop that keeps critical processes running smoothly.

Process mining not only helps identify process inefficiencies, but "helps complement RPA perfectly to offer a wider context and help implement this task automation, resulting in generating long-term sustainable business value and avoiding the current shortcomings of having a short-term perspective focused on large one-off cost savings."

Ninety-eight percent of respondents see the automation of business processes as vital to seizing business benefits.[8]

[4]Reducing Errors from the Electronic Transcription of Data Collected on Paper Forms, NCBI.
[5]The Worldwide Employee Engagement Crisis, Gallup
[6]Root cause human error, ProcedureNotFollowed.com

[7]Market Guide for Process Mining, Gartner
[8]IT Automation Survey, PMG

TAKE THE DIGITAL TRANSFORMATION QUIZ

How can I better scale my business and add capacity?

How do I minimize the time spent doing non-productive work?

How can I better utilize the power of my workforce for more sophisticated tasks?

DID YOU KNOW?

Gartner expects the market for process mining to easily triple or quadruple in size by 2020.[9]

[9]Gartner, Market Guide for Process Mining

GET WITH THE TIMES: RID YOUR ORGANIZATION OF THE MANUAL MALAISE

Despite advances in technology, many processes are still labor- and people-intensive. Process and knowledge workers toggle day in and day out between multiple systems and screens to achieve what is sometimes referred to as the "last-mile" integration of data checking, inputting, searching or organizing to drive an outcome.

RPA's intelligent software robots can automate these mundane, routine tasks of acquiring and integrating information from virtually any application or data source, including websites and portals, desktop applications, and enterprise systems. The work your employees do in manually moving information between applications, clicking between windows or swiveling their chair to work between machines or monitors can now be automatically done behind the scenes by intelligent software robots.

Dynamic and powerful software robots mimic the specific actions your employees take while performing tasks in various applications. A software robot does the work like a human—the only difference is it never makes a mistake and it works 24/7. In essence, the robots are a smart digital workforce working side-by-side with your employees.

Work is completed with 100% data accuracy, avoiding costly errors and rework while eliminating manual tasks and accelerating workflow. And, robotic process automation frees your knowledge workers to focus on more strategic, valuable work.

As stated in an article from Create Tomorrow, "Robots are 100% accurate with process exceptions referred to experienced staff that benefit from only dealing with the more interesting work. RPA helps a company leverage talent by giving employees time to innovate and focus on human-centered activities, such as customer service. Ultimately, it gives business both the freedom and toolset to be creative and entrepreneurial. The things humans do best."

RPA employs a simple no-coding methodology and can be implemented in a matter of weeks, not months, with minimal disruption to your operations. The technology is agile, works with your existing systems and doesn't require re-engineering of your processes. It's also easy for non-technical end users, so little training is necessary. In addition, RPA has elasticity, meaning it can easily adapt and scale to your changing business needs.

DID YOU KNOW?

Fifty percent of automation opportunities are being missed.[10]

A typical, rules-based process can be automated by 70—80%.[11]

[10]Software Robots: The Long Tail of Automation, Wired
[11]Are you ready for the second machine age?, Create Tomorrow

## DIRECTING ROBOTS TO AUTOMATE YOUR KEY BUSINESS PROCESSES

RPA can be deployed for virtually any business activity involving users, data and systems.

It can be used to automate manual tasks in any industry:

- In the transportation and logistics sector, RPA can automate shipment scheduling and tracking, load researching and invoicing and credit collections.

- For manufacturing, supply chain automation with RPA can dramatically reduce the time to market and simplify supplier interactions.

- For banking, RPA can be used to streamline the mortgage lending process, verification activities, customer onboarding, compliance and risk management reporting, and customer service.

- In the insurance industry, RPA is used to simplify claims processing and administration, compliance and risk management reporting, and customer service.

- For healthcare, RPA helps medical professionals and administrators to keep centralized medical records, handle admissions, verify patient eligibility and physician credentialing.

- Across many industries, RPA can automate a number of back office finance and accounting process activities, including order fulfillment, financial close, and submitting vendor invoices to supplier portals along with tracking payment.

In other words, intelligent robots can be used to replace any set of manual activities where data is accessed and acted on from several different systems and sources.
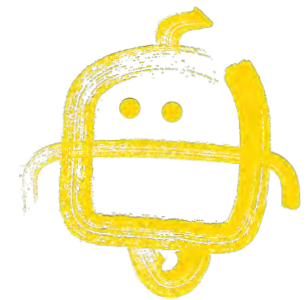
SMALL STEPS. BIG RESULTS.

PITT OHIO
SUPPLY CHAIN ▪ GROUND ▪ LTL ▪ TL

The PITT OHIO Success Story

PITT OHIO offers a premium level of service to a select group of shippers. Among the services their premium customers receive is the ability to request pick-ups by email. To support this benefit, Customer Service Representatives (CSRs) manually re-keyed shipment details from the original email into their internal scheduling application. To confirm the pick-up date and time, a CSR had to log in to the shipper's portal and re-key the response.

Robotic process automation delivered remarkable productivity gains, enabling PITT OHIO to expand the scope of their premium service, and increased their revenue at minimal cost. By eliminating manual website updates, PITT OHIO reclaimed 90–95% of a CSR's time for higher-value work. Robotic automation eliminated 100% of the cost of routine B2B portal updates, and costly transcription errors have been eliminated.

SENDING ROBOTS INTO ACTION

Robotic process automation can be deployed tactically within a business unit and can meet specific goals for a portion or the entire process. RPA is complementary to traditional integration tools and business process management (BPM) and case management platforms where robots are used at various steps within a larger set of processes, helping your organization to further eliminate manual steps in key operational processes.

Software robots can automate tasks that were the exceptions in your previous process automation efforts, complementing the solutions you are using today to fill the gap. Even though these activities may be rules-based and ideal for automation, they are still being performed manually by your employees. This may be because they "fall between the cracks" of multiple systems, or these automation projects have been too small or complex to be addressed by IT. No IT department has unlimited time, budget and resources to address all of the needs of the business.

SMALL STEPS. BIG RESULTS.

ARROW

The Arrow Electronics Success Story

Arrow Electronics special quote and invoice processes were limited by manually intensive and repetitive data entry. Special quotes simply didn't work with Arrow's existing B2B processes and interfaces, such as EDI and RosettaNet, because they were non-standard requests. As a result, hundreds of suppliers that they worked with fell outside the normal, standardized processes.

Arrow deployed robotic process automation, avoiding an expensive IT project and having to wait many months or more to implement a solution. Conservative estimates of reducing manual effort by three minutes per order or invoice translated into hundreds of hours/month saved.

Product asset specialists now spend their time working more closely with customers, cut-and-paste errors have been eliminated and faster invoice payments may even yield special discounts for their customers.

SMALL STEPS. BIG RESULTS.

UnionBank®

The Union Bank Success Story

Increased demand in the secondary mortgage market opened up lucrative sales opportunities for Union Bank, but they needed to act fast to get the best value for loan deals. Manual work and delays often meant lost sales, slower time to revenue and a negative impact on the bank's cash flow.

Software robots now automatically gather all relevant files, combine them into a PDF with bookmarks for easy navigation and send a notification to loan officers when the file is ready—all in a matter of seconds. This is just one of many process activities in Union Bank's consumer lending group where software robots are being used to automate manual tasks, enabling faster-time-to-revenue for loan deals, lower costs and easier audit compliance.

WHY ROBOTIC PROCESS AUTOMATION NOW?

Robotic process automation delivers numerous benefits for your business:

- Creates an immediate 25—50% cost savings by automating tasks at a fraction of the human equivalent[12]

- Increases staff productivity, service levels and capacity by 35—50%

  Consistently delivers 100% accurate data

- Decreases costly errors; delivers a zero error rate

- Reduces cycle times; reduction in processing can reach up to 90%; 30—50% can be achieved for an average process[13]

- Reduces average handling time by 40%

Robotic process automation can also be used to cut outsourcing costs. "Reevaluate outsourcing contracts," advises Cliff Justice in a CIO article[14]. "If you're a buyer of outsourcing, ask your provider what they're bringing to the table in terms of automation." Using RPA eliminates risks associated with outsourcing, including a lack of process standardization, visibility and audit trails needed to ensure compliance with regulations and requirements.

[12]Benefits of RPA, Institute for Robotic Process Automation
[13]Benefits of RPA, Virttia
[14]Robotic Process Automation – Will you be a leader or a laggard?, CIO

TAKE THE DIGITAL TRANSFORMATION QUIZ

Are there points in the process we can optimize?

Where do bottlenecks occur that cause a poor customer experience?

What exceptions or behavioral trends may be putting compliance in jeopardy?

PINPOINTING MANUAL TASKS READY FOR ROBOTIC PROCESS AUTOMATION

SO, HOW CAN YOU DETERMINE WHERE TO IMPLEMENT RPA AND PROCESS INTELLIGENCE?

Business and IT leaders should work together to understand where and how RPA and process intelligence can best solve manual task and automation challenges. Here is a checklist of things to look for:

Which areas are underperforming?

Examine your business and try to pinpoint the areas that consistently deliver lower results than others. Consider investing in process intelligence to help you identify performance issues. Also, consider whether some areas fail to deliver when it comes to innovation or productivity improvements. Some operations may be slowed by employee absences because they rely on manual processing rather than automated workflows. By identifying these areas that require human action, your business can effectively determine where automation could streamline workflows and boost productivity. We have machines for that now, you know.

DID YOU KNOW?

RPA 'robots' are revolutionizing the way we think about and administer business processes, IT support processes, remote infrastructure and back office work.[15]

[15]Frank Casale, CEO, Institute for Robotic Process Automation

Where are rigid applications or information siloes creating bottlenecks?

Examine your business and try to pinpoint the areas that consistently Take a hard look at your business and see if you are struggling to collaborate and share information between different business areas and departments. A mix of existing systems, duplicate systems or migrated systems from M&As could be adding big bottlenecks to your processes, and these processes are likely disconnected from other areas where operations have been transformed by modern applications and customer-centric automation.

Do you have processes that can't be scaled unless you hire more people?

As your business continues to grow, your processes need to grow with it. You need to be able to keep up with demand, without being hindered by the number of people on your team. If you need to hire more staff just to keep these manual tasks or outdated processes running, then that's a sure sign that process improvement is needed.

DID YOU KNOW?

We have seen evidence of process mining providing one of the cornerstones of a company-wide digital transformation initiative...it aims to discover, monitor and improve real processes.[16]

[16]Gartner, Market Guide for Process Mining

Where are your employees performing repetitive, manual tasks?

If your staff is performing repetitive, rules-driven tasks to acquire, analyze and act on information or process a high volume of incoming information, these activities are ready for automation. A rules-driven workflow only works if it's standardized and performed consistently. The chances of errors and exceptions increase significantly when humans are performing the work. Having your staff manually collect and input data, especially if it's on a frequent, daily basis, is also a waste of their valuable time and your company's money.

Are your employees constantly copying and pasting information between internal systems and business portals?

Significant process improvement opportunities exist where employees are constantly copying and pasting data between portals, websites, applications, spreadsheets or email. If you are relying on manual data entry to ensure your information is accurate and that multiple systems are all up to date, chances are the work is not being completed on-time and key services you provide to your customers are being impacted.

Do you have highly paid knowledge workers dedicated to time-consuming administrative tasks?

If critical customer-oriented projects are being put on the back burner because your resources are tied up with manual, low-level tasks, then

that's a clear productivity loss for your company. Being busy is not the same as being productive, and you want your employees to focus their talents beyond time-consuming manual tasks.

If you changed a policy or procedure, do you know how it would impact your business processes?

Use process performance information to make strategic decisions about how to optimize your workforce. Process intelligence provides in-depth, end-to-end visibility and monitoring of your business processes for a holistic view of your operational performance and compliance, and can help you identify new revenue opportunities.

DID YOU KNOW?

Repeatable tasks that search, collate, update, access multiple systems, and make simple decisions are the best RPA targets.[17]

Gartner recommends process owners work with IT process leads to "find and catalog non-automated processes where people are keying in or moving data between systems for manual, repetitive rule-based activities."[18]

[17]Forrester May 2016 report: Digitization Leaders Share Robotic Process Automation Best Practices: RPA Shows Value But Can Disrupt Automation Goals

[18]Gartner, 'Use Cases for Robotic Process Automation: Providing a Team of 'Virtual Workers,' October 2015

Are human data-entry errors creating frequent rework or exception handling?

Manual data entry always leads to costly errors and constant rework. If work is being rerouted to an exception-handling queue for manual review and correction, or if productivity levels are suffering in other departments due to work errors and delays for corrections, then those are warning signs that things need to change.

Is your company considering outsourcing processes that you would prefer to keep in house?

While many companies see outsourcing as an inexpensive and quick solution for manual work, rising costs, wage inflation, foreign currency exposure and quality concerns have dramatically eroded the benefits of offshoring. Outsourcing also creates challenges for compliance, with a lack of process visibility, reporting and audit trails to ensure you are adhering to regulations and requirements.

If your company is considering outsourcing processes, this might be the time to explore a more creative and cost-effective solution such as RPA, rather than shipping unwanted processes overseas.

DID YOU KNOW?

Eighty-eight percent of processing mistakes are due to human error. The typical person makes between three to seven errors per hour. Under stressful conditions, this error rate rises to an average of 11 errors per hour.[19]

[19]Root case human error, Procedure Not Followed

SMALL STEPS. BIG RESULTS.

Leading Health System Gains Agility with Analytics

A leading integrated healthcare system in the U.S. sought to improve patient outcomes. The strategy involved connecting data from disparate systems to offer nurses, managers and leaders real-time information about patient needs. To support that goal, the team developed a series of analytics dashboards based on the principle of monitoring, measuring and managing.

To date, the health system has deployed 20 dashboard projects across the enterprise using a centralized application framework with decentralized analytical development. All together, more than 1,700 employees regularly use these dashboards, with a total view utilization count across all dashboards of over 120,000.

"Real-time data analysis on staffing levels, acuity levels, and more offers our personnel the insight they need to improve patient care."

– Director, Data Solutions

TAKE THE DIGITAL TRANSFORMATION QUIZ

What steps are we missing—or doing out of order?

What is the relationship between users, time of day, roles, and locations in how our processes are executing?

Do we know what happens to the documents and data that we've captured with our document capture systems?

Can we be fully and objectively confident that documents will actually arrive from one system to another?

THE POWER OF PROCESS INTELLIGENCE

Monitoring processes and identifying further opportunities for improvement have historically been a challenge for organizations. Processes are often siloed in various systems, just as data is often siloed. This makes real-time visibility into how a business process that spans multiple, siloed systems is being executed—from start to finish—impossible to achieve.

As a result, correctly pinpointing the specific areas where bottlenecks appear or your employees are least productive can be a difficult exercise. You also may be unable to see where process steps are being completed out of order. Critical processes are rarely straightforward in a linear sense. Complete and detailed visibility into audit trails across systems is also a challenge.

And, while your organization may have automated document capture and processing, there may be issues gaining a single analytics view across the entire process and multiple technologies. Each system can provide individual reports, but there isn't a way to get a holistic view of the entire document lifecycle, from receipt to final archive. When an action in one system has an effect on another action in a different system, there is no way for you to check whether each step has been completed.

Siloed processes aren't just a huge problem in executing and improving the work; they are also a significant compliance risk. Without a full audit trail and process accountability across all systems in the process, you cannot prove compliance and could face significant penalties.

DID YOU KNOW?

Forty-eight percent of respondents in an AIIM survey said they have no ability to monitor in-house apps at all.[20]

Narrow stovepipe or keyhole views into individual systems and devices do not provide broad visibility across end-to-end processes or issues that involve multiple applications or devices (systems-of-systems). In the absence of a holistic monitoring solution, such as an operational intelligence platform, processes and operations run largely 'in the dark.[21]

[20]Process Intelligence: The Next Evolution in Business Analytics, Kofax and AIIM
[21]Gartner, Market Guide for Operational Intelligence Platforms

BUSINESS INTELLIGENCE VS PROCESS INTELLIGENCE: HOW TO TELL THE DIFFERENCE

As stated previously, it's important to monitor and track processes, documents and employees accurately and completely. We previewed process intelligence in the introduction, but shouldn't business intelligence or analytics tools be able to do this?

Business intelligence (BI) systems can provide analysis of historical data on throughputs and outcomes, but they lack any understanding of the process holistically. Consequently, they are unable to track individual paths through the process where failures may have occurred—or more critically, are about to occur. BI tools are limited to point-in-time calculations with no ability to understand the process context of these values.

To find that out, IT must build all of this logic in code to provide context, and that's both time-consuming and costly. Yet, if left undone, your business leaders must make decisions based on only a piece of the operating picture.

Decision-makers often rely on data from static reports or spreadsheets that is out of date because they don't have ready access to more current information. In some organizations, managers may have limited real-time visibility with dashboards from packaged software applications.

"To achieve true operational BI, it's imperative to know what the data means in the context of your business processes"[22], according to RT Insights. While analytics provide data on what happened in the past, process intelligence gives you visibility into what is currently happening, so you can take action to improve your processes in near-real time.

Delays are often cited as the top process challenge for organizations, impacting customer experience, risk mitigation and competitiveness. But without process intelligence, there can be little to no visibility across an entire process to fix the problems. A Deloitte study on the six tenets of process improvement stated that "advanced analytical tools can provide much richer insights and "intelligence" related to actual process performance. As companies increase focus and investment on workflow automation and data analytics, supplemental analytical process intelligence tools will become increasingly more important in driving toward solutions."[23]

The report describes analyses that were done across a population of process instances to better understand patterns of execution. Their study of dozens of instances across numerous organizations and industries revealed that 73% of activities in an average process do not add value.

DID YOU KNOW?

Nearly 60% of respondents to an Association for Information and Image Management survey cited process delays as their primary problem.[24]

[22]Process Intelligence: More than BI, RT Insights
[23]Process Intelligence: Six Tenets of Intelligent Process Improvement, Deloitte
[24]Key Process Intelligence Research Findings, Kofax and AIIM

COMING OUT OF THE DARK
WITH PROCESS INTELLIGENCE

With process intelligence, you can see your operations in a new light. Its many benefits include:

Greater insight and faster improvements

- Gain a new understanding and actionable insights to improve processes

- View processes in real time so you can deal with immediate problems and adjust before they cost your business time or money

- Manage anomalies and exceptions quickly and more efficiently

- Pinpoint areas of process inefficiencies with customized dashboards

Better workforce management and optimization

- Understand where your employees are spending their time and the ways applications are most commonly used

- See the impact of changes in procedures and policies on workload and response time

- Plan and adjust for seasonal peaks in workload

Complete document visibility and audit trails for compliance

- Track the entire lifecycle of every document you process, across every system, from capture through to archival

- Obtain a full "cradle to grave" audit trail of each document to reduce risk

- Gain visibility into audit trails of who specifically performed an activity, when they performed it and what data they accessed during the process

- Monitor Service Level Agreements (SLAs) and avoid missing commitments

- See how process execution impacts the customer experience

Enhanced decision-making and business agility

- Access accurate and complete data for a holistic view of your processes and operations

- Use process performance information for strategic decisions and to identify new revenue opportunities

PUTTING PROCESS INTELLIGENCE TO USE FOR YOUR INDUSTRY

Process intelligence can be used to identify inefficiencies, bottlenecks or compliance issues in automated processes across multiple industries and functions. For example, process intelligence can:

- Provide visibility into the real-time status of shipments. Manual processes can't show shipments currently being delayed due to bad weather.

- Identify the number of claims or mortgage applications currently waiting at each process step. Large and persistent backlogs indicate a bottleneck and a negative impact on the customer experience.

- Identify which products seem to take the longest to pack and ship. This points to process bottlenecks and inefficiencies.

- Analyze the details of each patient associated with a specific exemption to find where processes are failing.

- Reveal an unacceptable percentage of invoices failing to follow the prescribed process path.

- Gain visibility into an invoice every step of its journey for accounts payable and where exceptions are slowing down payments.

The net result: your organization is better informed and able to be proactive, not reactive—and smarter and more predictive in how you manage your operations. With this new insight, your organization can focus on ensuring business processes are running optimally and driving a better customer experience.

You can track documents throughout their lifecycle and be confident you will have a complete audit trail to avoid penalties and fines for non-compliance. You can better anticipate problems and deal with peaks and bottlenecks at specific steps in a document's flow through the business process before they cause customer issues or missed opportunities.

Organizations that leverage process and document intelligence perform better, react to problems faster, make better decisions, and do more with less by reducing waste and eliminating errors.

Stated more simply, Process intelligence allows you to make adjustments in real time that can make a big difference:

- Review a process from start to finish. Examine workflow throughout the process.

- Uncover and fix bottlenecks

- Discover exceptional pathways

- Drill down and take action

SMALL STEPS. BIG RESULTS.

DELTA DENTAL

The Delta Dental of Colorado Success Story

Like many organizations across all industries, Delta Dental of Colorado, the state's leading dental benefits company, faced increasing customer demands for better, faster service. Many of their more agile competitors were happy to take any potentially dissatisfied customers. To meet market demand, remain competitive and seize more market share, the company moved from paper-driven processes to electronic content and workflows.

Delta Dental was seeking to transform numerous processes, including customer onboarding, provider/dentist credentialing and application processing. They accomplished that with robotic process automation and process intelligence.

Delta Dental's big results:

- Implemented solutions quickly and achieved ROI within six months; for several projects, Delta Dental realized ROI in as early as 1–2 months

- Streamlined data-gathering and verification for application processing

- Introduced a centralized electronic document repository and flexible case management capabilities

- Enabled faster, easier access to information for audits and reduced risk; can access information online in seconds

- Established document traceability for audits

- Improved response times and service, both for customers and providers

"Every day, we exchange a huge amount of information with our dental providers and customers, concerning applications, renewals, policy updates, and more," said Heather Magic of Delta Dental. "In the past, it was difficult for teams to access and process this documentation efficiently. A lack of visibility and control over content meant that files often got lost in the shuffle, and could take days or even weeks to be processed. Now just two people can process all of the work items without the need for help from a temporary worker."

TAKE THE DIGITAL TRANSFORMATION QUIZ

What is the average time it takes to go from Step 1 to Step 2?

What is the minimum/maximum time to execute a process, and how consistent are we?

Can we track and monitor the entire lifecycle of every document we process, across every system it travels on its path to final archival?
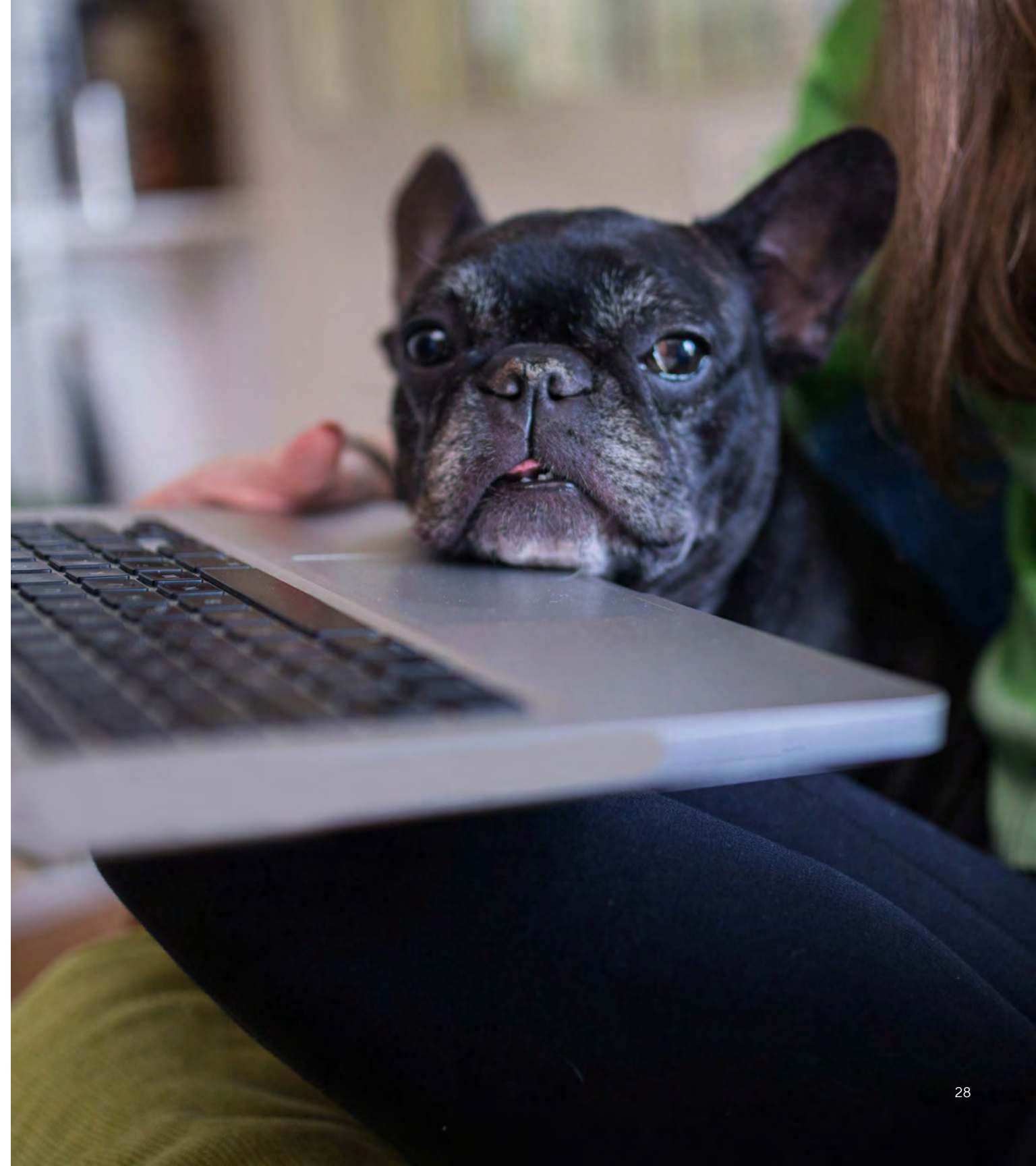
RPA AND PROCESS INTELLIGENCE: BETTER TOGETHER

Process intelligence is the first part of the transformation equation and lays the foundation for RPA. You must be able to pinpoint exactly where bottlenecks and inefficiencies exist in your business processes before you can decide which tasks are best-suited to delegate to a digital workforce.

Remember, it's not enough to just apply process improvements with robotic process automation and process intelligence—you also need to track and measure the improvements to achieve maximum results. When organizations lack a holistic view and metrics for their operations, it is difficult to know and report the effectiveness of process changes in meeting your business objectives.

According to Gartner, it's recommended to "invest in process mining capabilities to provide visibility and understanding of the actual performance of business operations and processes before starting any automation initiative, whether at a task, workplace or process level."

Conventional BI tools are typically limited to discrete, point-in-time metrics and cannot tell you what is really happening across your entire business processes. Reporting is often focused on one part of the process and unable to measure time spent at any particular step or provide the necessary insight into how process execution is impacting key performance indicators such as customer satisfaction, revenue or compliance.

Process intelligence can provide the information you need to measure and report process transformation success. Examples of the metrics you can track include:

- Measure whether on-time shipments increased

- Measure and compare claim or mortgage application times

- Assess whether there was an average reduction in time to process an invoice

- Analyze how the process is impacting customer satisfaction

- Track the number of mortgage applications processed efficiently after process refinements

DID YOU KNOW?

Forty-four percent of AIIM survey respondents are only monitoring or measuring processes at the departmental level.[25]

"Without analytics, what you have is an opinion. If you actually have numbers and statistics to back that up, it goes a long way in keeping everyone on the same page. You're all going from one single version of the truth."

— Derek Strutzenberg, Salt River Project

[25]Process Intelligence: The Next Evolution in Business Analytics, AIIM

SMALL STEPS. BIG RESULTS.

While there are many benefits associated with robotic process automation and process intelligence, a significant benefit is the ability to better understand your processes and deliver personalized, near real-time, on-demand analytics to everyone in your organization. Your business leaders can analyze process performance for greater insight, better workforce management and faster improvements, as well as to ensure compliance across all tasks.

The sum is greater than the parts

- Obtain process analytics within context, as opposed to having to pull the information together piecemeal.

- Acquire timely insights into how well your processes, and the operations they represent, are working.

- Reduce waste, eliminate errors and minimize compliance risk.

- Achieve proactive, data-informed decision- making for increased agility.

- Uncover new opportunities for optimization and cost savings that would otherwise remain undiscovered.

TAKE THE DIGITAL TRANSFORMATION QUIZ

Are we providing our customers the best possible experience, or can we do better?

Can we reduce process costs such as labor without negatively impacting our business?

Do we have a full "cradle to grave" audit trail of each document for compliance requirements?

WHAT YOUR SENIOR MANAGEMENT AND IT LEADERS NEED TO KNOW

Robotic process automation and process intelligence are not niceties, but necessities to effectively compete for the long haul. Manual work and knowledge workers unassisted by automation simply can't keep up with ever-increasing information, a changing marketplace and mounting regulations. Lack of visibility into how your processes are executing at every step is a major obstacle to delivering big results, from increasing productivity to improving compliance and bottom-line profitability.

Making the business case to your senior management and IT leaders and sparking their enthusiastic support is the final step in your process transformation journey and to making a real difference in your organization.

The key lies in first understanding the perspectives and priorities of your senior management and IT leaders—understanding their goals and then presenting a compelling business case that aligns with their objectives. You should also be prepared to discuss the roadblocks encountered when attempting to reconcile repetitive manual tasks with automated processes used in other parts of the business.

DID YOU KNOW?

The top three reasons businesses automate are efficiency, cost reduction and risk mitigation.[26]

MAKING THE BUSINESS CASE FOR RPA & PROCESS INTELLIGENCE

The following table summarizes the key points to begin making your business case to senior management.

SENIOR MANAGEMENT

PRIORITIES & CHALLENGES	RPA BUSINESS CASE BENEFITS	PROCESS INTELLIGENCE BUSINESS CASE BENEFITS
Looking to improve business agility, innovation speed, competitive edge and data-driven decision-making—ultimately to increase profitability	Highly attractive to upper management as a cost-effective solution for process improvement	Enables business leaders and users to quickly access, analyze and optimize business operations with a unified, single solution
Cost control and budgetary restraints are also always foremost in their mind	Increases staff productivity, service levels and capacity by 35—50%	Delivers customized, real-time analytics to identify and rectify anomalies before they become issues
	Delivers 25—50% in savings	Enables data-driven decision-making, better workforce management and faster, ongoing improvements
	Delivers 100% accuracy in data, reducing costly errors and rework that slows operations	Provides insights and complete audit trails to reduce risk and costly penalties due to non-compliance
	Slashes processing times by up to 90% (30—50% reduction for an average process)	ROI is typically expected within 12 months
	ROI is typically delivered within 12 months and sometimes as soon as six months	Unlike business intelligence (BI) approaches, doesn't require multiple tools from different vendors
	Knowledge workers can be redeployed to work that requires a human touch, delivering more value to the business	

RPA + PROCESS INTELLIGENCE BUSINESS CASE BENEFITS:

✓ Enables faster time to automation (process discovery outlines which robots can be built)

✓ Takes the guesswork out of which robots to build

✓ Provides visibility of before and after scenarios

✓ All available from a single vendor

MAKING THE BUSINESS CASE FOR RPA & PROCESS INTELLIGENCE

The following table summarizes the key points to begin making your business case to IT.

IT

PRIORITIES & CHALLENGES

Tasked with aligning their objectives with the business priorities, and delivering solutions quickly and cost-effectively

Battling long project lists that grow longer with each passing day

Traditional integration tools and in-house development often take months, or even years, to plan and execute

Looking to improve agility, shorten deployment times, decrease or eliminate touch points and tickets

Seeks to deliver precisely what the business needs; make changes without breaking anything

Wants to lighten the workload on their own overworked staff—and do it all at or below their budget, which seems to shrink every day

RPA BUSINESS CASE BENEFITS

Highly attractive to upper management as a cost-effective solution for process improvement

Increases staff productivity, service levels and capacity by 35—50%

Delivers 25—50% in savings

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PROCESS INTELLIGENCE BUSINESS CASE BENEFITS

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Provides insights and complete audit trails to reduce risk and costly penalties due to non-compliance

ROI is typically expected within 12 months

Unlike business intelligence (BI) approaches, doesn't require multiple tools from different vendors

RPA + PROCESS INTELLIGENCE BUSINESS CASE BENEFITS:

✓ Having pre-integration and pre-built dashboards lowers the time to deploy and to manage

✓ Reduces risk and conditions of non-compliance with a unified solution

LOOKING TO THE FUTURE

RPA is a starting point to automation and sets the groundwork for more advanced machine learning and artificial intelligence (AI) in the future. Where RPA focuses on automating well-defined process activities, AI has the power to learn and deliver predictive and prescriptive analytics. Predictive analytics provide insights to process changes required to meet future needs, whereas prescriptive analytics provide suggested actions to improve processes in the present.

According to a Deloitte report, "Automation using artificial intelligence will be the next game changer in terms of process efficiency." This report also found that RPA or intelligent automation is already influencing the way business is done today in nearly sector of the economy. "It is already helping companies transcend conventional performance trade-offs to achieve unprecedented levels of efficiency and quality."

As Forrester[27] states in its report: "Enlist RPA to augment the cognitive strategy. Leading-edge automation technologists view RPA as part of their cognitive road map. For example, the 'office and administrative' cubicle category boasts many tasks ripe for robotic process automation (think loan interviewers, order processors, or credit authorizers). RPA is easy to implement, is tactical, and focuses on task execution and error reduction—all with clear ROI and less risk than cognitive apps."

The good news is you don't have to rip out the platform and systems that are core to your business. Robotic process automation and process intelligence can work side by side with both your applications and your knowledge workers to create a digital workforce and the ability to gain insight for further process improvements.

DID YOU KNOW?

The robotic automation market is expected to reach US $4.98B by 2020 and is forecast to grow at 60.5% CAGR from 2014 to 2020.[28]

55% of respondents in an AIIM survey indicate they are planning to use a process intelligence solution in the future.[29]

28% of CEOs' 5-year investment plan intentions include business analytics.[30]

[28]IT Robotic Automation Market, Transparency Market Research

[29]Document Process Intelligence: Extending BI and BPM to Improve Document Centric Business Processes, Kofax and AIIM

[30]The Future of White-Collar Work: Sharing Your Cubicle with Robots, Forrester Research, Inc.

Forrester[31] affirmed in a report that enterprises must start with two clear focuses for process improvement: identifying and addressing manual efforts and tasks, and exploring how automation can improve customer experiences and engagement. While advice abounds and experts debate the future of innovative technologies such as robotic process automation and process intelligence, process improvement will continue to be a top priority for organizations, and automation the prime means of achieving it.

The good news is you don't have to rip out the platform and systems that are core to your business. Robotic process automation and process intelligence can work side by side with both your applications and your knowledge workers to create a digital workforce and the ability to gain insight for further process improvements.

DID YOU KNOW?

"Humans are working smarter with sophisticated software to automate business tasks, which, in turn, is generating rich process data that drives meaningful insights, value and outcomes for businesses.

By using increasingly more astute technologies, smart businesses are doing a much better job of tackling complex process opportunities. In short, they are fast becoming force-multipliers to people who are still essential to process work."[32]

[31]Digitization Leaders Share Robotic Process Automation Best Practices, Forrester Research, Inc.
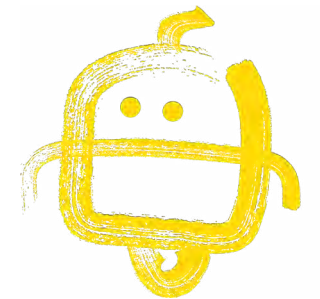
[32]How New Digital Technologies are Making Smart People and Business Smarter, Cognizant

THE DIGITAL TRANSFORMATION QUIZ

HOW DID YOU DO?

Remember all those questions. Make note of how many you are able to answer accurately and completely today.

Take the test again after you've implemented robotic process automation and process intelligence. See if your answers have changed now that you have the necessary tools and insights to digitally transform your processes.

READY TO GET STARTED?

Request a **demo** of Kofax RPA
or start your **free trial**.

LEARN MORE

Robotic Process Automation **>**

Process Intelligence **>**

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