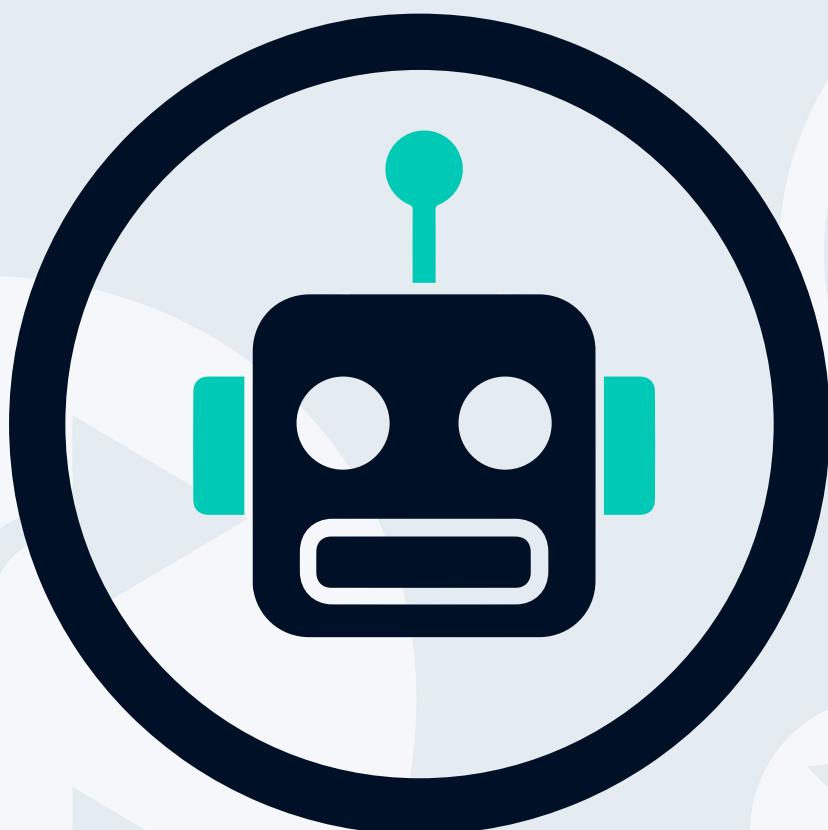
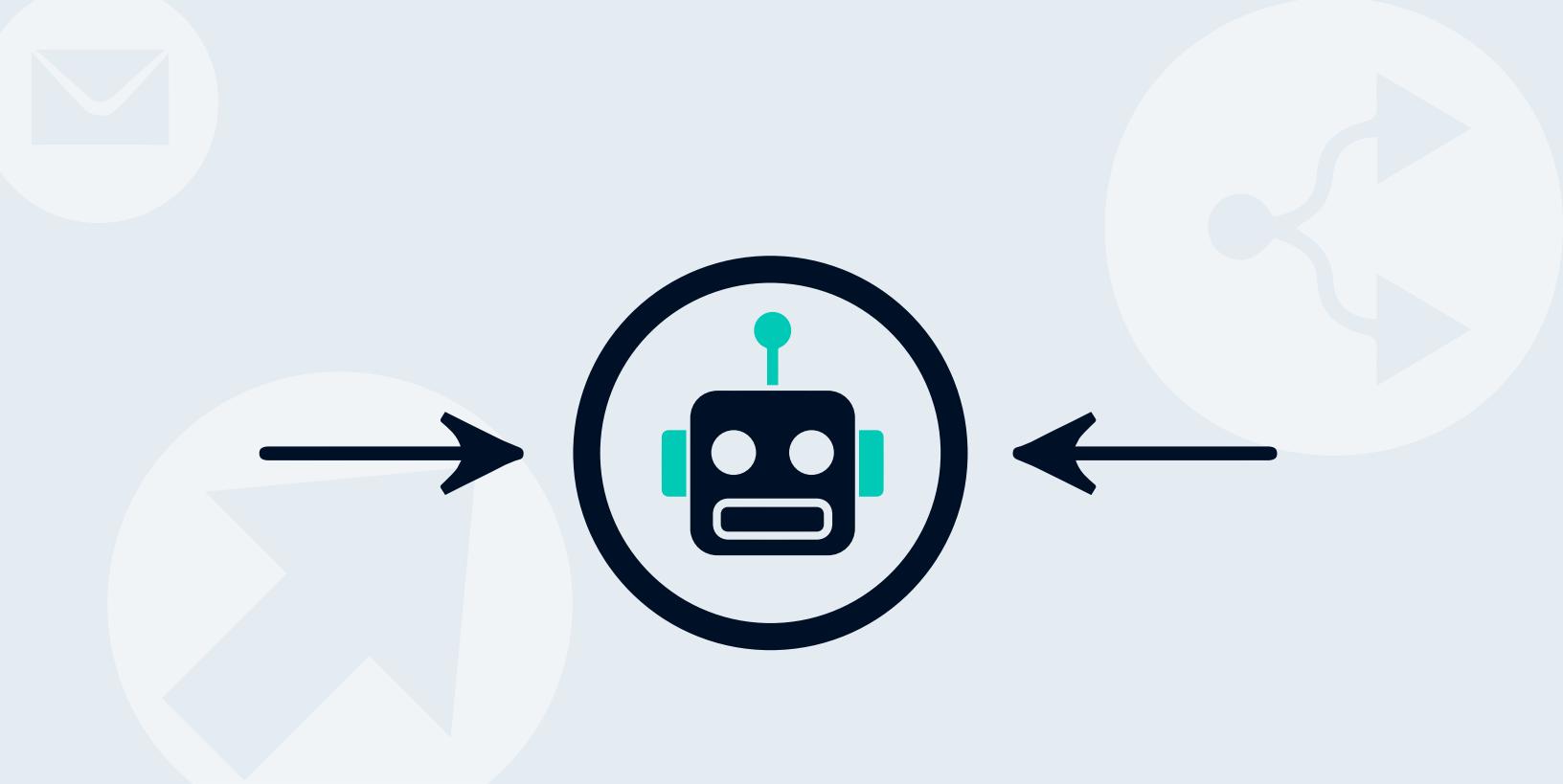




The role of Process Management in Automation Projects

Whitepaper





Introduction

Automation projects are increasingly deployed with the aim of saving costs and moving the organisation forward. Processes, or parts of them, can be faster and fully automated, increasing efficiency and reducing costs while improving service. For automation programmes, it is important to establish process management as the foundation and discuss the primary work being performed by employees.

This Whitepaper explores the importance of process management in the context of automation projects and shows how Engage Process, as a process management platform, can help drive success in automation projects by enabling you to map and improve current processes before automation is implemented.

Processes always form the framework

For automation projects, it is important to take process management as the foundation and discuss the primary work being done by employees. While it may seem obvious, a process can only be automated if the process is known. By mapping processes with the involved stakeholders to identify bottlenecks and assign responsibilities, process management provides a framework for implementing improvements. This framework enables organisations to better understand the impact of change and use it when building a business case. This allows organisations to more clearly identify the need for new technologies and justify their acquisition.

Where does process management fit within automation projects?

Implementing automation projects requires a thoughtful and strategic approach to ensure that technology is effectively and efficiently integrated into existing work processes. Moreover, the goal is to get automation projects right the first time and reduce the need for adjustments. Here are some considerations for using process management to make automation processes more efficient:



1. Know the process and relevant exceptions

Before a process can be automated, the process must be known and understood in detail. Here, it is important to consider the '**hidden factory**' when reviewing processes in preparation for transformation. In Lean principles, this refers to exceptions to standard ways of working. Before organisations automate processes or implement changes, it is important to first properly identify "all" exceptions in the process. The number of exceptions is often much higher than people realise. By documenting all steps and exceptions within a process, the likelihood of the automation being applied "first time right" is much higher and the new solution can be effective immediately.



2. Improve first

A process should never just be automated, but always improved first. Often, processes already turn out to be partly obsolete. For instance, non-customer-value-added steps can be identified and eliminated, and it may turn out that automation is then no longer necessary or can be better applied to another (partial) process. Tasks and roles could perhaps be combined and an attempt could be made to capture data unambiguously or within one attempt by centralising one application. In addition, some activities in the process could be carried out in parallel to one another, or with additional support to achieve '**first time right**' execution in the process. By starting out with an improvement initiative first, performance can improve dramatically even before automation is needed. The priority might then change to another process or part of the process.



3. Underpinning RPA project: AS-IS (current) vs TO-BE (automated) situation

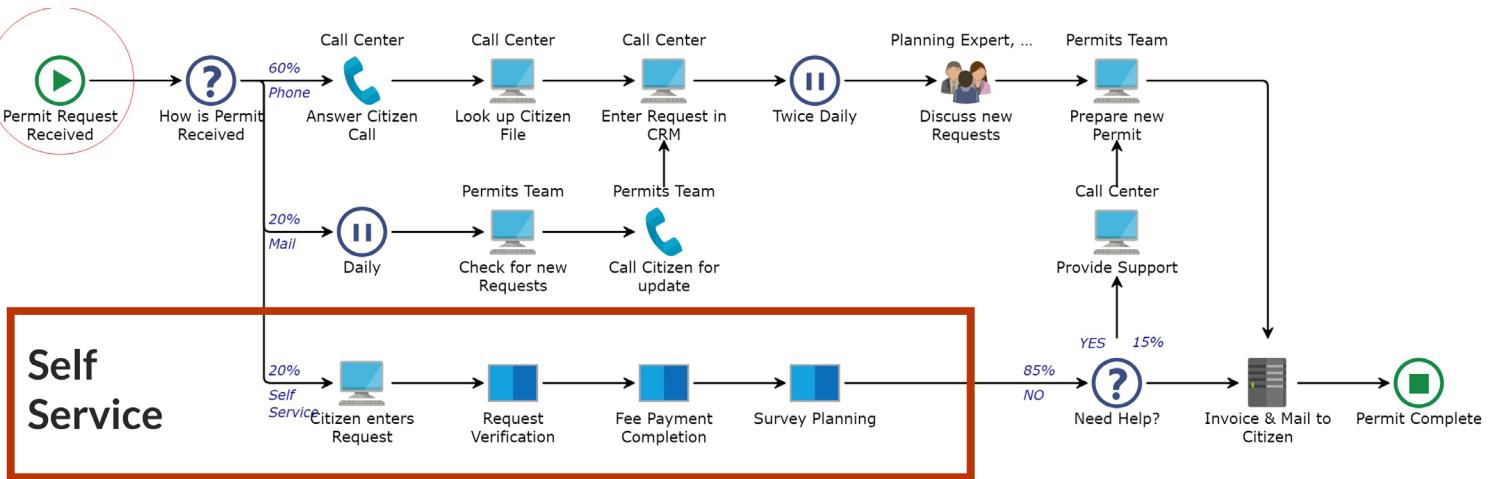
In our process management platform, you can compare the current process (AS-IS situation) with the future automated process (TO-BE situation), to clarify the need and benefits of automation. How and where does automation help with cost, lead time and quality? This helps to substantiate the added value and visualise the changes it brings. By putting both situations side by side, decision-makers can make a more informed choice about implementation and expected outcomes.



4. Involve the process experts - from their perspective

Process management also plays an important role in involving operational staff and process experts in the automation project. They can better understand and support the automation project when it is reflected in their service processes. Where does the automation take over some of the work, and how does this connect to the work the employees are responsible for? Employee engagement extends beyond participation in automation projects. By examining work processes together with other operational staff, for example during interactive workshops, ideas often emerge that the IT department or management had not thought of at all. Questions such as: '*Why don't we also apply this aspect here in the process?*' to suggestions such as: '*Deploying self-service here in the process could possibly be more effective.*' People Driven Change, or involving employees, will always be an essential factor in the success of automation projects.





A process manual clearly indicates where self-service is in the process.

👁️ → 5. New services in the near future?

Take possible new services into account and wait to design and implement them until they are clear, to avoid duplication of effort. By looking ahead and taking future developments into account when mapping processes, organisations can avoid new IT solutions becoming 'obsolete' before they are properly operational.

⚙️ 6. Continuous improvement

In many organisations, continuous improvement programmes have been set up for services. But are the automated parts of processes also part of them? Keep improving processes even after the implementation of automation projects. Work does not stop after the first automation; continuous improvement is essential to ensure that processes continue to function optimally and adapt to changing circumstances. You can think of the robot as a virtual colleague; if laws and regulations are changed, the work of this colleague must also be reviewed and, if necessary, the work process must be adjusted. So include the automated parts of a process in the process diagrams and make them part of continuous improvement programmes.



7. Put other aspects into perspective

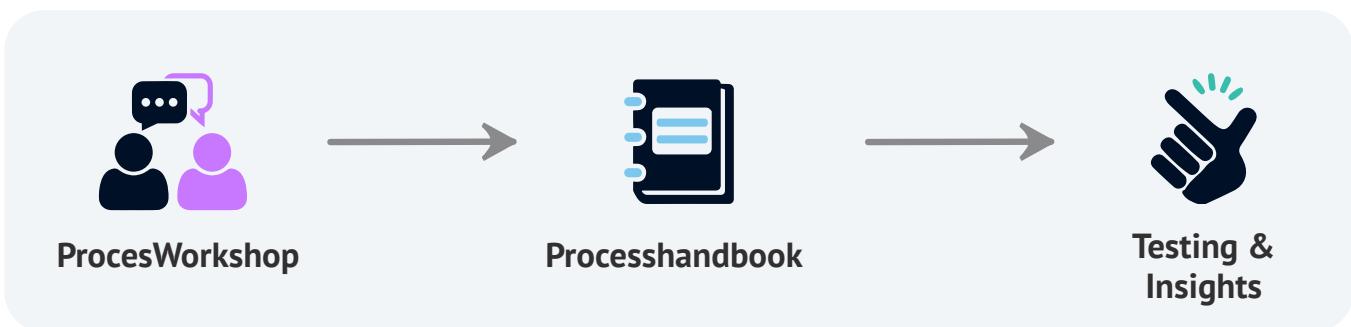
Consider data, compliance, risk and other relevant factors when planning automation projects. It is important to have a holistic view of the impact of automation on the organisation, including the potential risks associated with the changes. A process management tool can help to include all relevant aspects in the process map/process map, from which automation will take place. Here too, the automated part of processes should not stand alone, but be integrated into the processes.

How can Engage process support as a process management platform?

Engage Process is specifically designed to combine operational control and engage executive teams. The platform supports process workshops, where executive teams can easily be involved in discussing processes, digitally capturing all relevant details, exceptions, desired ways of working, roles and responsibilities and therefore, also supporting automation processes. The platform gives employees insight into how work should be done at the process step level.

Through a process manual, mapped processes with all roles, responsibilities, procedures and practices documented can be easily shared with the entire organisation. This allows employees to understand how and where in the process automation is applied and what steps are required to achieve the desired result. The quality of a service or product is achieved because teams know what to do and when!

The process manual can also be used immediately after a process workshop, in which the possibilities of automation are explored with employees, to share the results. This allows employees to test the ideas generated during the workshop in their daily work. Often, new insights and corrections emerge from this, which are of great value for the automation project.

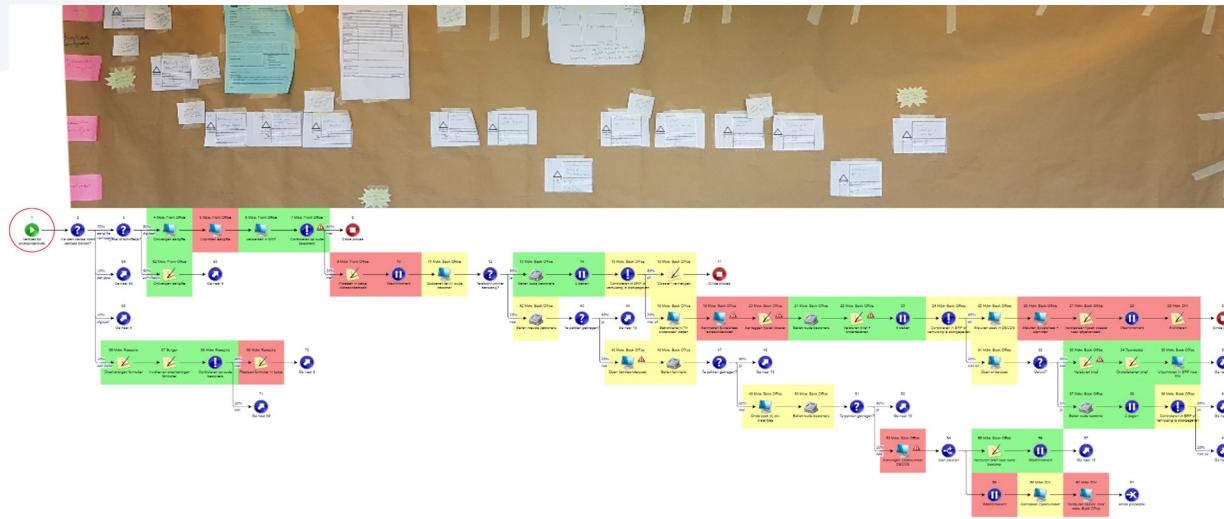


The Modeler, which is used to map processes contains a form of automation. The built-in Syntax Engine ensures that the mapped processes are always technically correct and automatically updated in case of changes. This makes it easy to manage complex processes. With a simple press of a button, an impact report can be created. This provides an overview to understand which process elements need to be addressed and helps teams understand the impact of changes to the process. Through this report, you can easily see which process steps benefit most from improvement and/or automation.

Some Examples

The Municipality of Stichtse Vecht decided to take a thorough look at their processes. In documenting the process, three important exceptions emerged. Employees indicated that they intuitively knew how to deal with these exceptions. Working with the Engage Process Modeler naturally revealed many more details of the third exception. How crucial are these details to automation or robotisation? They are absolutely critical and should be revealed as part of any automation journey!

When you start applying automation, it is also possible to incorporate bots step by step. For example, a bot can first handle only the regular processes, while the exceptions are sent to a separate mailbox. After this first step, 25% of the exceptions can be handled, with the more complex third exception being worked out and automated later. This step-by-step build-out of automation ensures a gradual and controlled implementation, each time automating part of the processes after thorough analysis and optimisation.

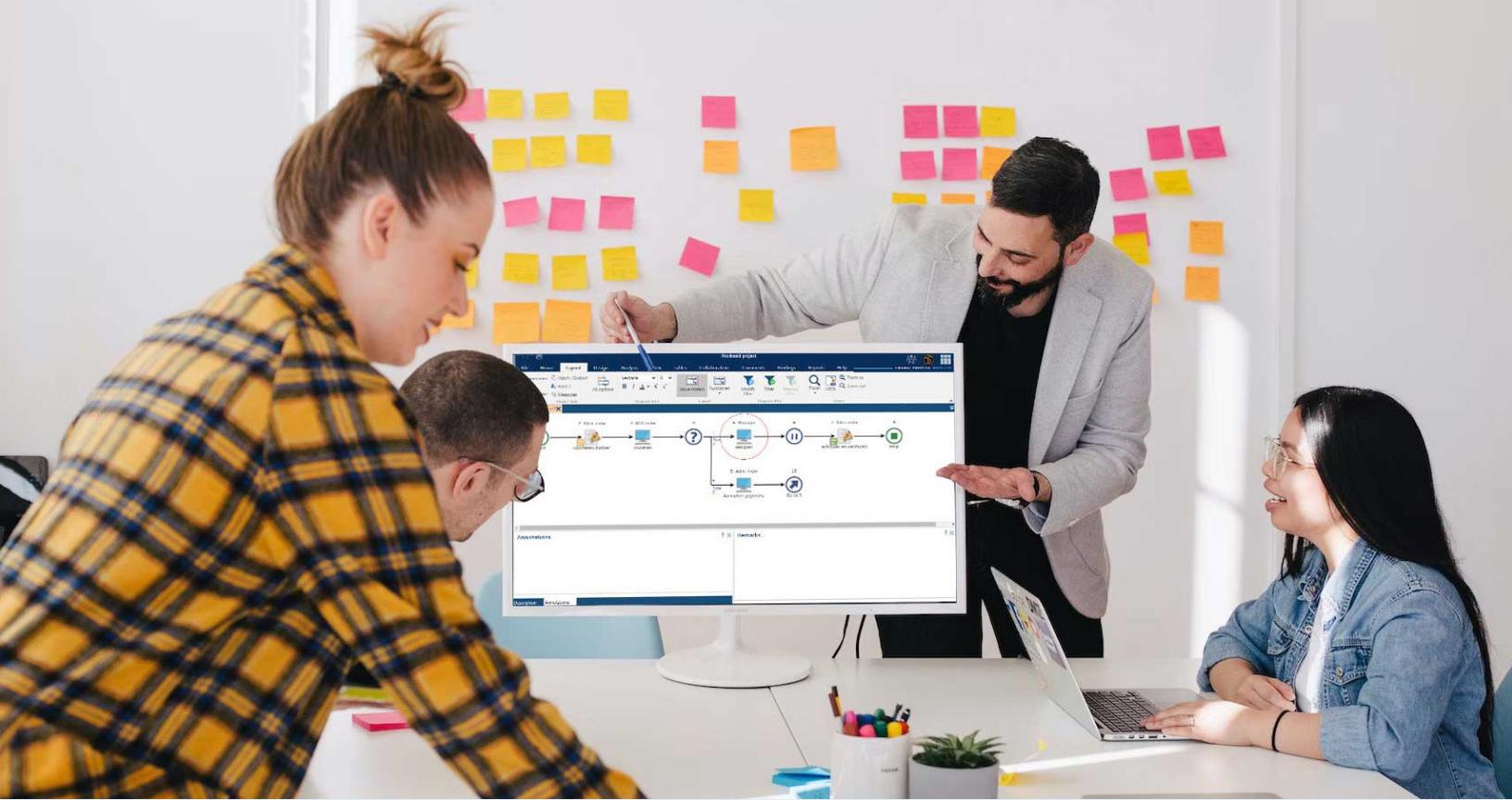


This image shows how the Municipality of Stichtse Vecht mapped the third exception in detail before robotisation was deployed.

Another example came from the Municipality of Venlo, which wanted to automate and partially robotise a complaints process with self-service. They started by critically analysing and improving the process, rather than immediately implementing robots. Employees were asked to indicate which steps in the current process they considered customer-value-adding (green), which steps were internally necessary (yellow) and which steps were no longer value-adding (red). This analysis showed that only 8 out of 80 process steps actually added value for the customer. This was because 90% of the process was found to be obsolete. Sometimes by improving first, you already make the process so much more efficient that robotisation is no longer necessary.



The obsolete complaints process of the Municipality of Venlo.



Conclusion

Process management plays a fundamental role in the success of automation projects, such as deploying RPA or AI. It provides the basis for effective implementation by first thoroughly mapping and improving processes. A process can only be automated if the process is known and an 'old' process should never simply be cast in concrete. Only through a detailed understanding of current processes and exceptions and by digitising all relevant data can automation be successfully deployed.

Engage Process provides the tools to map processes in detail, optimise them and act as a single central documented resource. This leads to more sustainable and successful automation projects, where efficiency increases as more work can be done in less time, and the likelihood of getting the process right the first time: '**first time right**' increases as 24/7 services can be applied.

About Engage Process

Engage Process empowers staff to discuss, evaluate and improve processes together. Putting the employee first makes Engage Process a true “human centric” solution. This means proactively exploring and reimagining processes in real time, by the people who are actively working with these processes day-to-day. Processes create the foundation for management programmes such as cost savings, compliance, service (re)design, and digital transformation.

Over 300 organisations in Europe and North America use Engage Process on a daily basis. These include Glasgow City Council, L&Q Group, and Tewkesbury Borough Council, as well as many others in different industries.

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