
Robots at Work

Closer than you Thought

Our panelists



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Robotic Process Automation

The market and trends

Sarah Burnett

November 2016

Everest Group's research is based on various sources of proprietary information

NOT EXHAUSTIVE

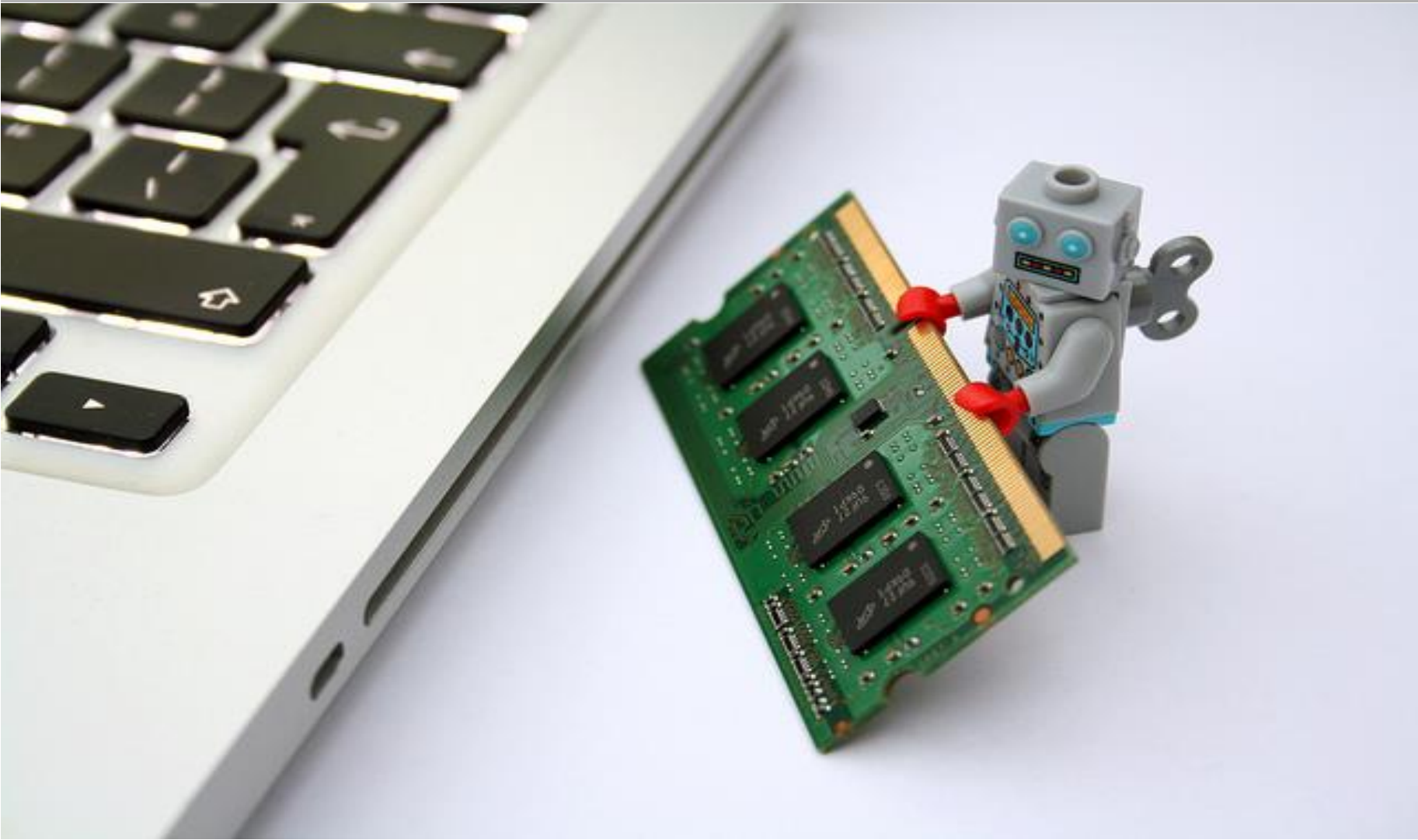
- 1 Proprietary database of SDA technology vendors**
- The database tracks the following capability elements for each vendor:
 - Automation creation and management features
 - Input/output options available
 - Support in terms of consulting, implementation, and training
 - Offered commercial model(s)
 - Buyer coverage by industry, geography, and buyer size
 - Company performance in terms of revenue and clients

- 2 Demonstrations and interactions with technology vendors and other industry stakeholders**
- Detailed demos and interviews with SDA technology vendors for a comprehensive view of the solutions
 - Interviews with technology vendors' reference clients
 - Executive-level discussions with technology vendors as well as service providers
 - Executive-level discussions with industry enablers / specialist technology integrators
 - On-site as well as conference meetings with the SDA technology buyers

- 3 The proprietary database of SDA capabilities of major service providers complements the research**
- The database tracks the following capability elements for each service provider:
 - Robotic Process Automation (RPA) historical and projected adoption trends
 - Support in terms of consulting, implementation, and training
 - Offered commercial model(s)
 - Buyer coverage by industry, geography, and buyer size
 - Key processes covered in terms of RPA deployment

Service providers covered in our analysis		
Service providers	SDA technology vendors	Specialist technology integrators
 	 	
 	 	
 		
 		
		
	 	
		
 		
 	 	
		
		

Definitions



Key definition #1: Service Delivery Automation (SDA)

SDA is – at its most basic level – use of technology to replace a series of human actions. Correspondingly, not all technologies provide automation, and replacing a single human action with technology (e.g., a mathematical equation in a spreadsheet) is not automation. At the same time, automation can be done by degrees, but some steps will still require human interaction.

SDA can encompass three different portions of the process:

Automation of inputs to a process

- Contact management
- Content scraping from websites

Automation of the business process

- Administering PO and invoices
- Checking for unusual patterns in transactions

Automation of outputs from the process

- Outward contact management, e.g., e-mail confirmations
- Internal notifications
- Events generated to activate follow-on processes in other functions

Key definition #2: Robotic Process Automation (RPA)

Robotic Process Automation (RPA) is a subset of SDA

It refers mostly to automation which interacts with a computer-centric process through the UI of the software which supports that process

It processes structured data using rules-based automation.

With this type of automation the outcomes are always known – it is rules-based and deterministic

This type of integration through the UI is sometimes referred to as non-invasive. In other words, data is entered/extracted through the UI of the software with no need for deeper software or data integration – in effect, behaving as if an actual user was at the keyboard using the software

This is important to outsourcing service providers who cannot modify client's IT systems

Example use cases

- Transaction processing
- Data entry in high volume, repeatable, computer-centric processes
- In system upgrade scenarios, double and concurrent data entry into old and new systems during the period of change

Key definition #3: Automation based on cognitive tools

A subset of SDA, cognitive tools build a process-related knowledge base and use it in combination with a set of business rules or patterns to automate processes. These can be used in IT services as well as business processes.

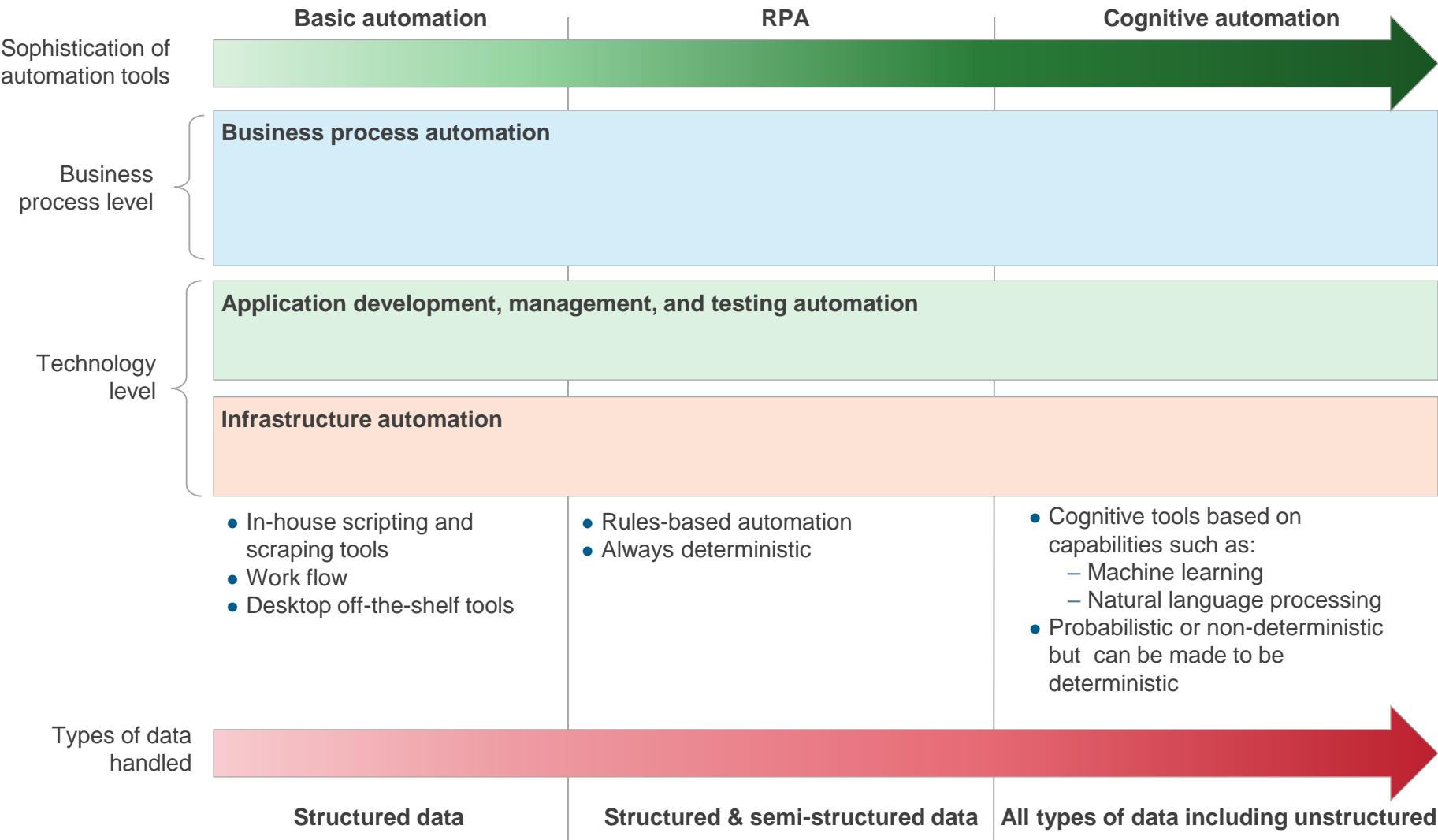
Cognitive tools can handle unstructured data. They can have machine learning and inference engines and instead of rules, infer what the next step should be i.e. the tools are probabilistic but can be made to be deterministic

Machine learning is often used to give cognitive automation the ability to learn from experience and to expand its knowledge base. As well as machine learning cognitive software can use business rules to automate processes, predictive tools to infer some operational decisions, big data to spot patterns and natural language capabilities including ability to sense sentiment. This allows these types of solutions to infer the correct way to deal with situations that might not match pre-compiled rules

Example use cases

- High volume, repeatable, document-centric, administrative and computer-centric processes
- In-bound document processing for contact centers
- Claims processing for the insurance sector
- Rewards processing for the telecom sector

Everest Group's SDA architecture | Automation can be applied at different layers of the process stack, from the supporting IT and platform all the way up to the actual business processes

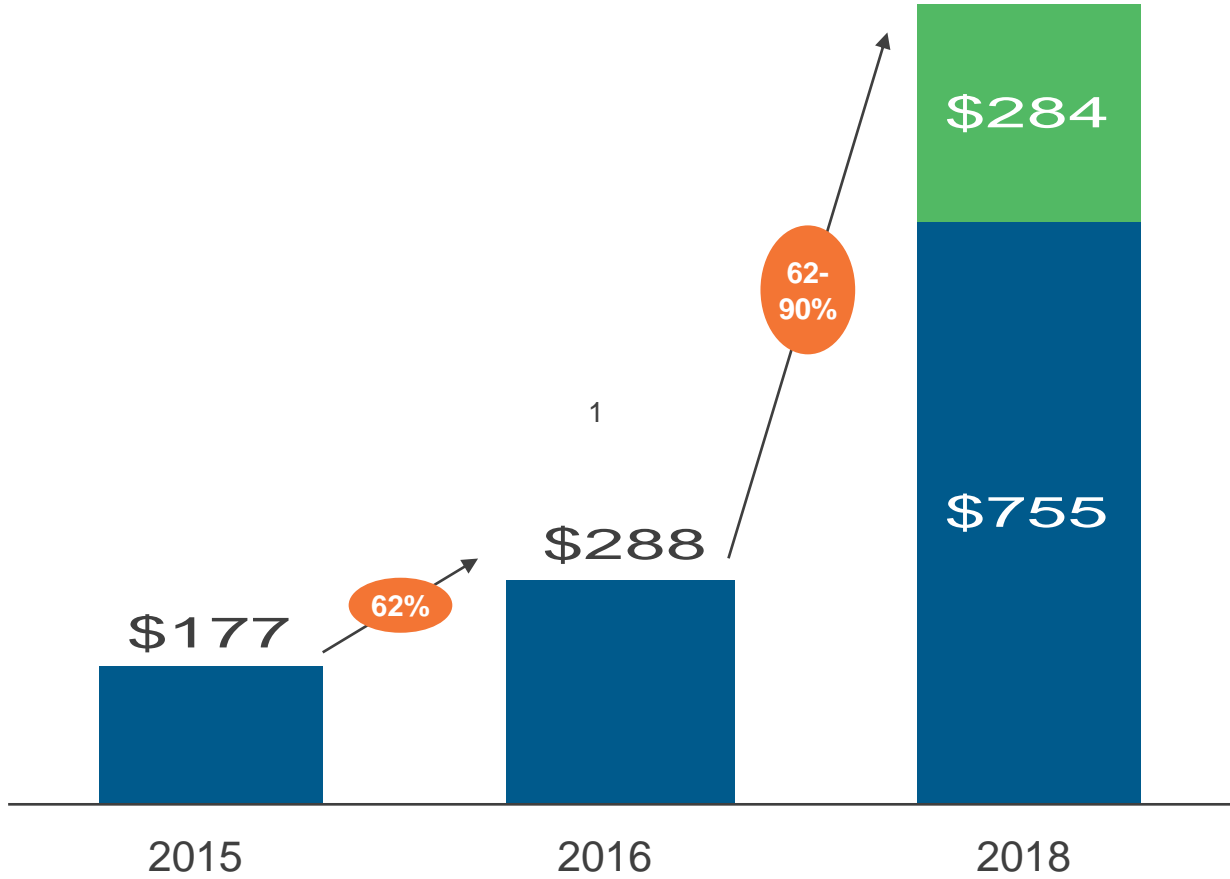


Focus on the global RPA market



RPA market size

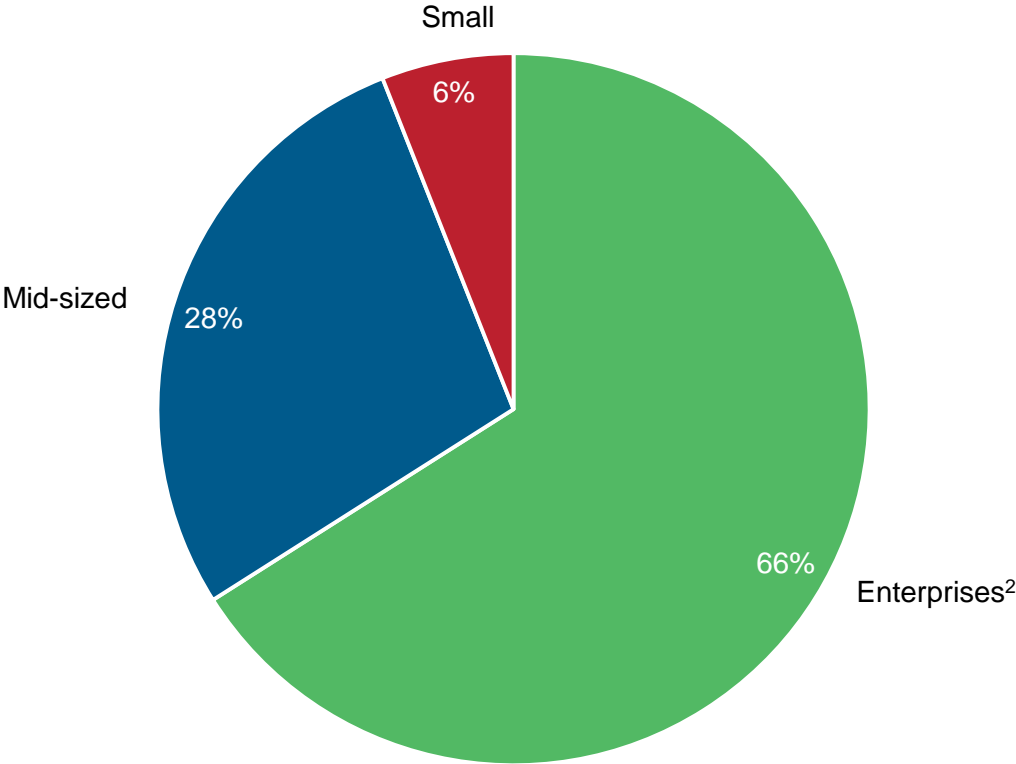
RPA market size¹
US\$ million



¹ RPA market estimated based on the revenues of leading RPA technology vendors – interim findings from research for RPA Technology Assessments FIT Matrix report to be published in December 2016.

Source: Everest Group (2016)

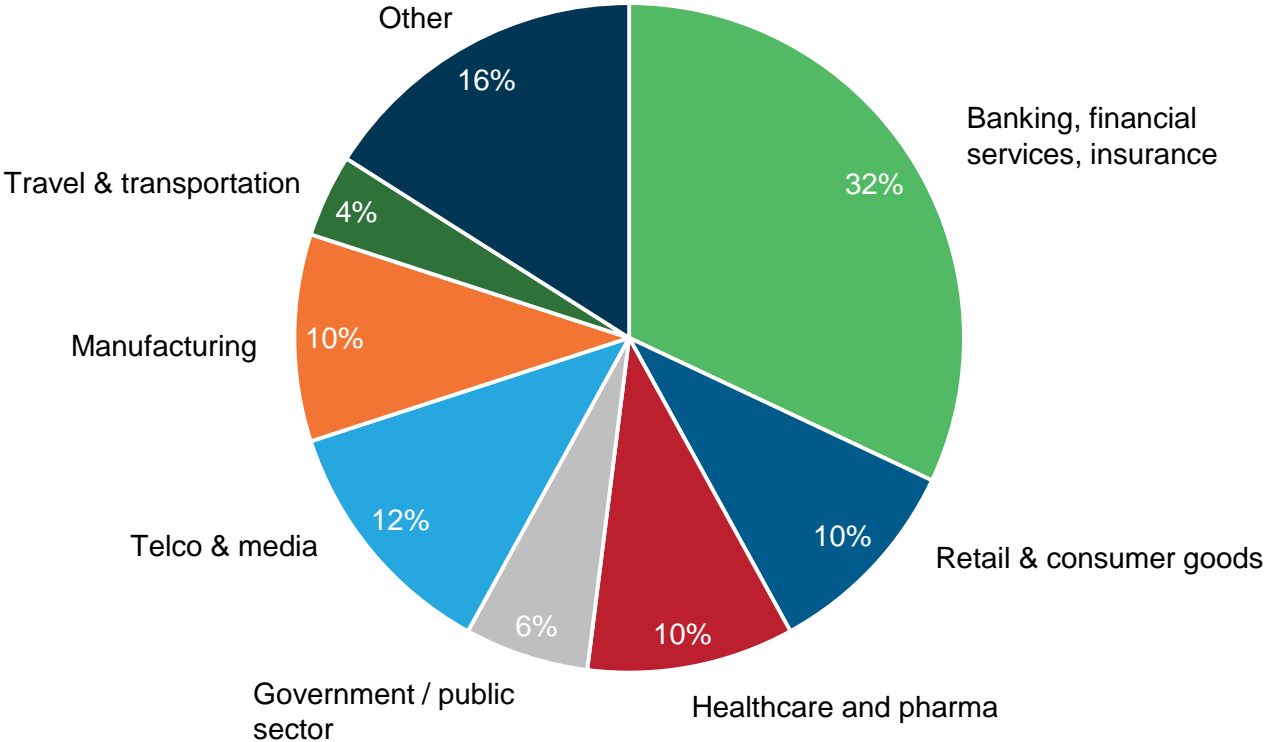
The RPA market by size of buyers¹



1 Interim findings from research for RPA Technology Assessments FIT Matrix Report 2016

2 Enterprises (revenues of more than \$1billion), mid-size (revenues of more than \$25million and up to \$1billion), small (revenues of more less then \$25 million)
Source: Everest Group (2016)

The RPA market by industry



1 Percentages based on estimated revenues by industry of leading technology vendors – interim findings from research for RPA Technology Assessments FIT Matrix Report 2016
Source: Everest Group (2016)

Pros and cons



Insights from the frontline¹

The journey: Exploration & implementation

Several participants described journeys that begin with casual cross-functional teams of operations, IT, and sourcing people exploring current activities to identify and share best practices and ultimately develop strategies, objectives, and charters for full RPA programs.

Sample timeline




Sample early results

Successfully automating
80-90%
of each process



versus anticipated rate
of 60-70%

 **3X** human
productivity
(robots not yet operating at full
capacity; potential for
improvement)



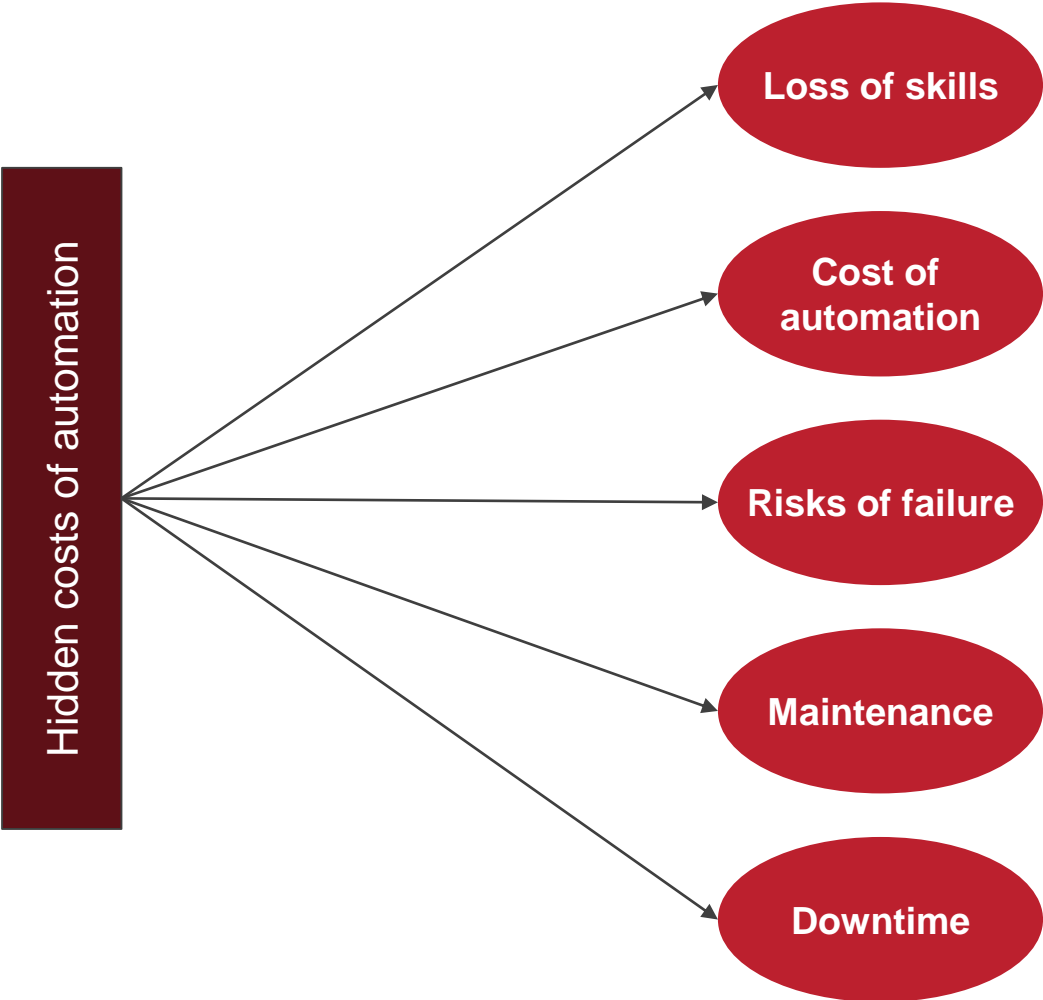
40-60%
savings across tier-1 IT
applications
maintenance support




800-5500%
first-year ROI

1- Findings from two virtual roundtables that Everest Group hosted in December, 2015. The roundtables were on preparing for Service Delivery Automation with a focus on Robotic Process Automation. The 21 attendees represented several industries, including healthcare, financial services, and technology.

However, automation comes with its own costs - many of these may be hidden

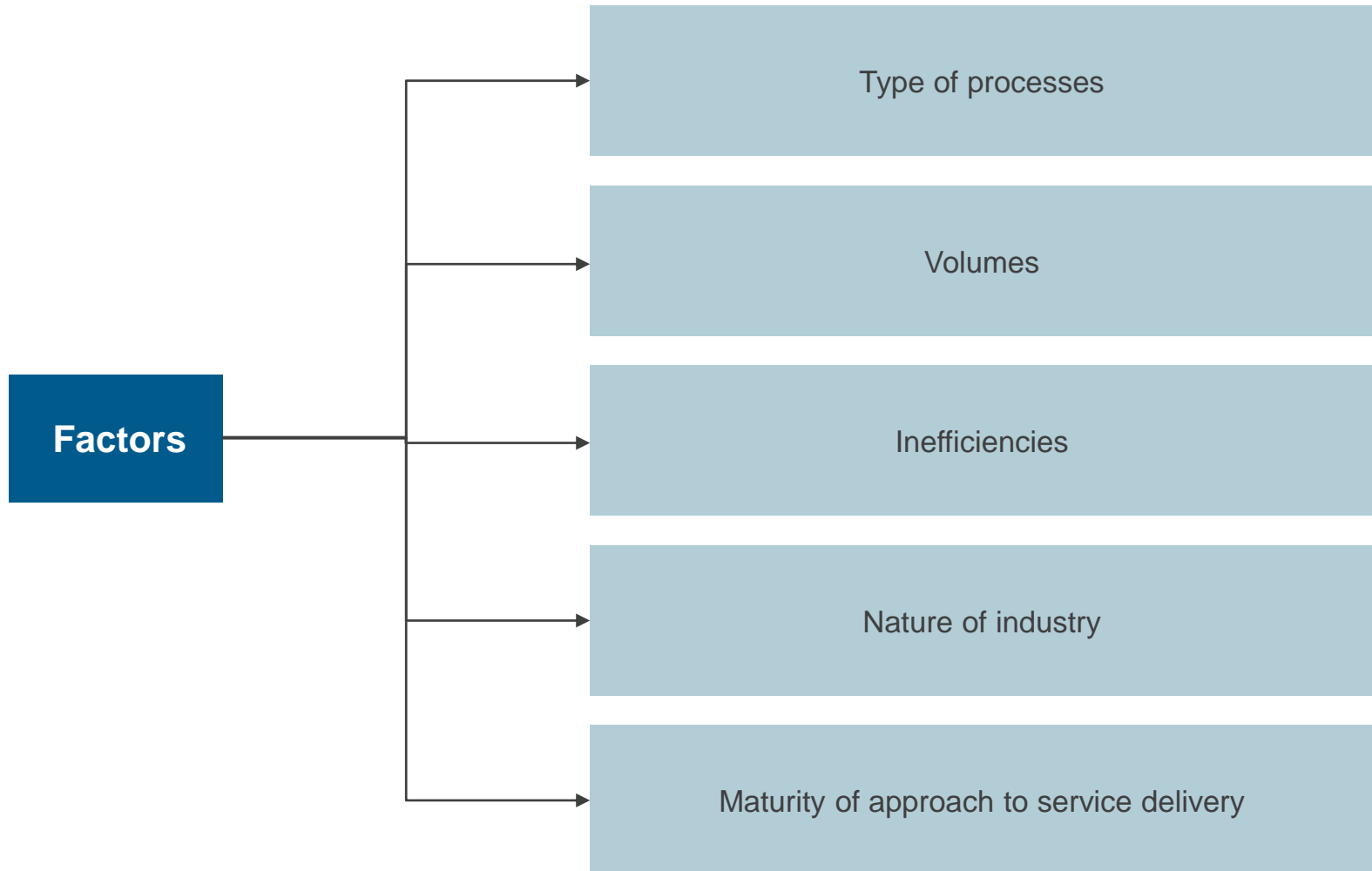


Adoption patterns



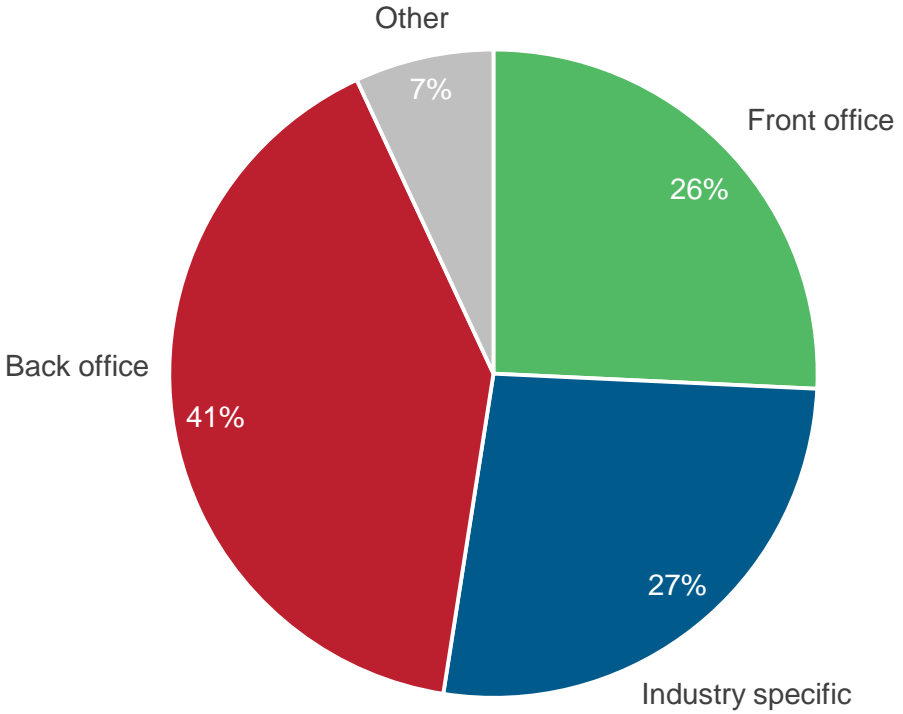
Adoption factors

Factors considered for the evaluation of adoption potential across different industries and business functions

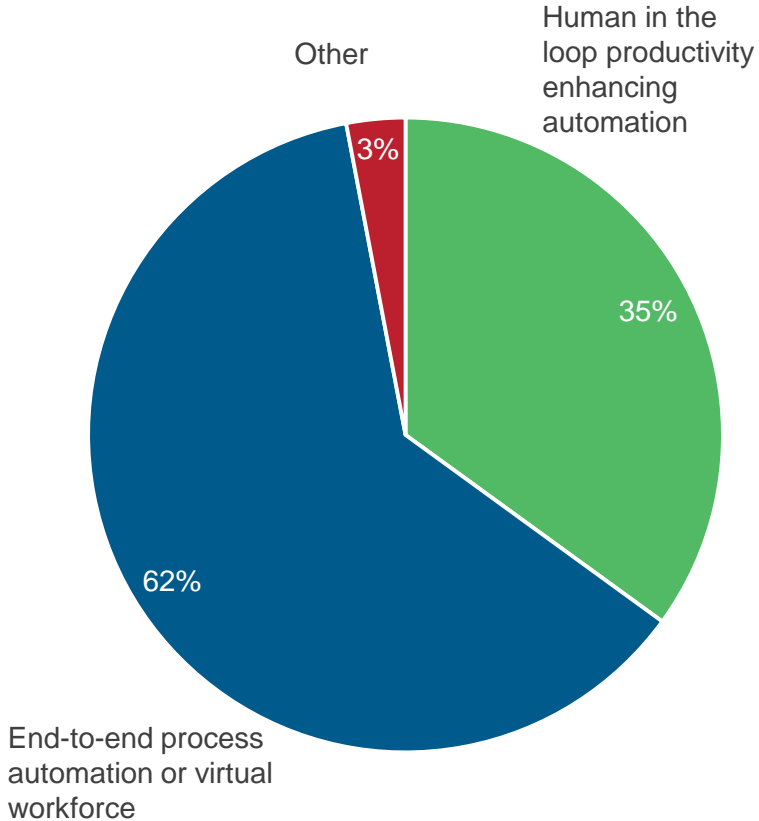


The market is using technology to automate a wide variety of processes and in different ways

Types of processes being automated



Most common styles of automation



1 Interim findings from research for RPA Technology Assessments FIT Matrix Report 2016
Source: Everest Group (2016)

RPA in global services

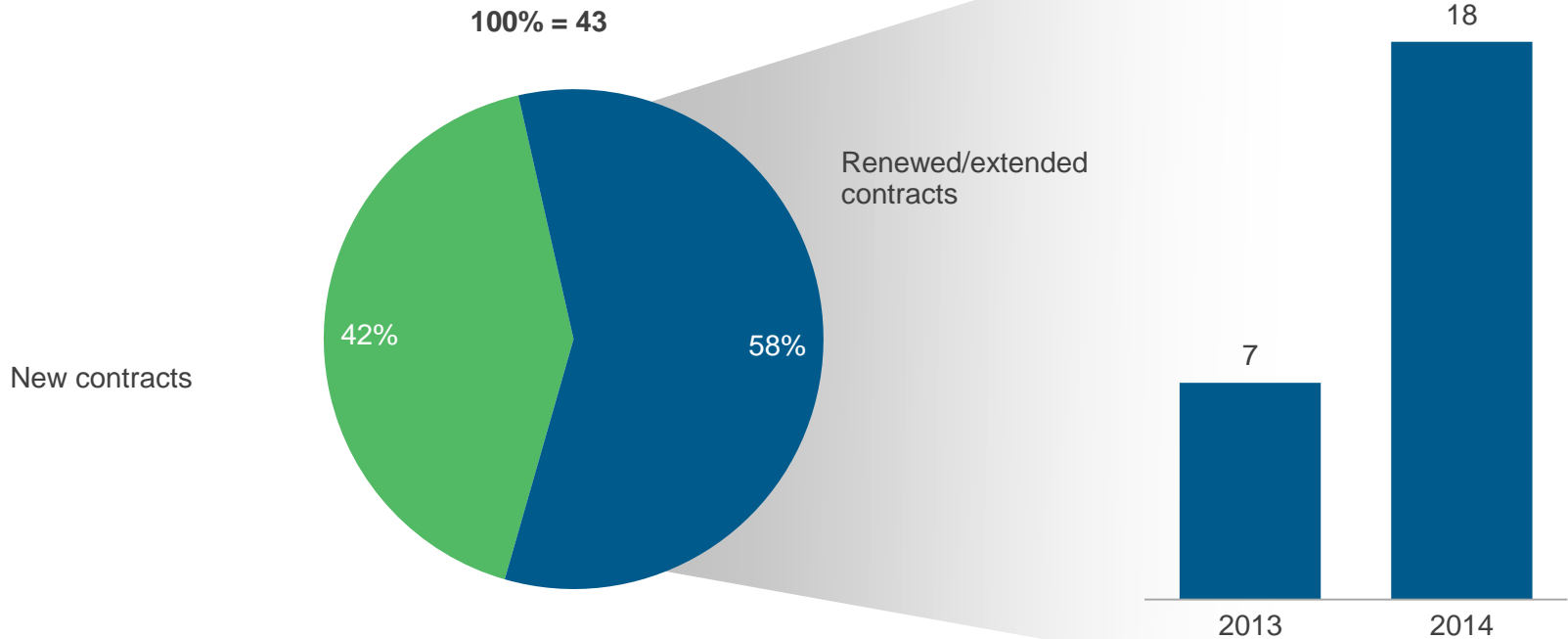


RPA in FAO

Existing buyers of FAO services have a major contribution in driving the adoption of RPA

RPA inclusion in new and renewed contracts

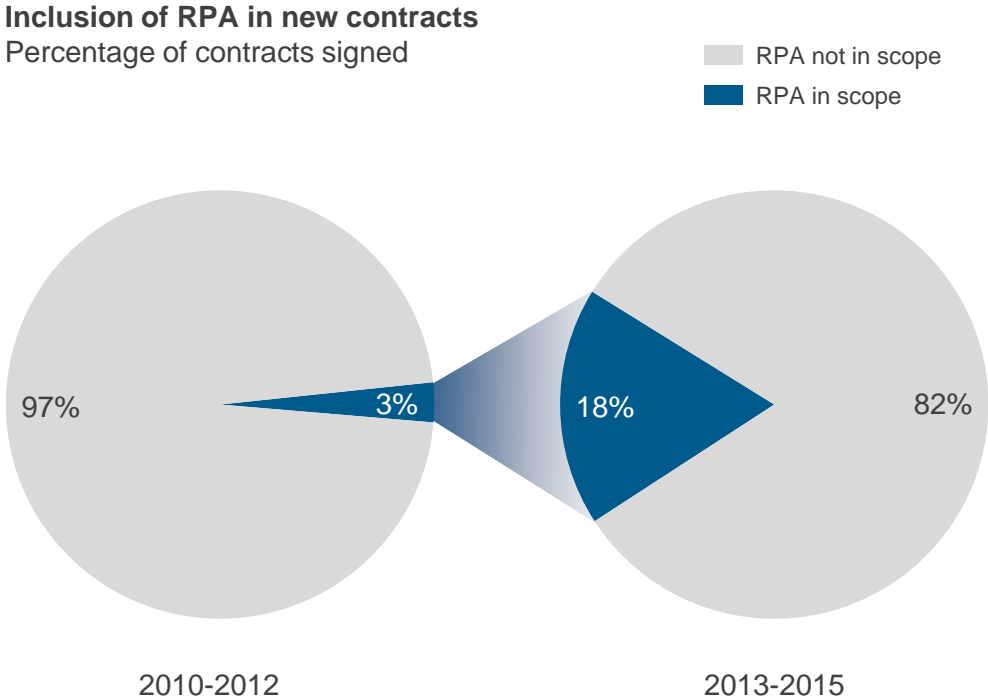
2013-2014; contracts with RPA in scope



Note: An upcoming report will be focusing on RPA landscape within FAO
Source: Everest Group (2015)

Adoption of RPA in P&C insurance BPO

Inclusion of RPA in the scope of new contracts has witnessed significant increase in the past three years



Source: Everest Group (2016)



About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empowers clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com and research.everestgrp.com.

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Robotic Process Automation Few Experiences

Naresh Kothari

Potential use cases for robotic automation

By Industry

Insurance	Banking	Retail	Telecom/ Cable	Health Care	Common
Customer service	Customer service	Customer service	Customer service	Customer service	General Service desk
Claims and underwriting	Account Maintenance	Master Data Management	Fulfillment	Claims and underwriting	HR
Finance & Accounting	Finance & Accounting	Finance & Accounting	Finance & Accounting	Finance & Accounting	Payroll
Dispute processing	Compliance & Risk Management	Root Cause Analysis	Enterprise Management	Transportation request	Benefits administration
Customer Acquisition	Wealth Management	Order to Cash	Regulatory & compliance	Customer Acquisition	T&E
Policy loading	Customer Acquisition	Supply chain	Asset Management	PCP change	On-boarding
Master data management	Risk reporting	Sales & pre-sales	Field support	Co-pay computation	IT service desk

RPA has delivered significant business savings with ROI of less than 6 months

Customer profile	Benefits delivered	# Processes	Automation %
Fortune 500 Retailer	<ol style="list-style-type: none"> 1. Reduced processing time by 75% 2. Zero error rate 3. Automated over 70% transactions 	20+	40%-74%
Fortune 500 Telco	<ol style="list-style-type: none"> 1.. 25% reduction in overall order completion cycle time 2. 30% reduction in customer response time 3. 98% first touch resolution 	100+	20%-80%
Leading Automotive	<ol style="list-style-type: none"> 1. Reduce process completion time from 15 to 7 minutes 2. Error free Invoice Posting 3. Zero error rate 	25+	40-80%
US based Insurance	<ol style="list-style-type: none"> 1. Improved process efficiency by 30% 2. Eliminated manual errors 3. Automated over 70% scenarios 	10+	40%-70%
US based Health Care	<ol style="list-style-type: none"> 1.Improved agent productivity 2.Unified dashboard with 1-click automations 3.Reduced repeat calls with integrated ask expert 	15+	15%-20%

Leading Health-care company: *Unified dashboard with on-demand automations*

Business problem and drivers:

- Manual logins into multiple applications & cluttered desktops for CSRs
- Limited automations for high call drivers and repetitive steps
- Limited collaboration and knowledge management



Solution delivered:

- Unified dashboard with automated sign-in
- On-demand automations
 - Account Lookup
 - Plan Lookup
 - Claim Lookup
 - Claim Document Lookup
 - SCCF Lookup
 - Voucher Lookup
 - Update Email
- Ask expert with automated context passing

Member

Segment: 00:21
Subscriber: PEGGY A
Group: Fall...ucati...
Member: PEGGY A
Package Information: 016

Self Service

Email: No Record Found [Update](#)
Registered?: [Update](#)
Electronic Consent: [Update](#)

Alerts

[Get PCMH Flag](#)

PCP On File: PCP Information: No PCP found | No PCP found
Is Active?: Termination Reason: No Termination Reason

Inquiries

Get Inquiries Reason Code: Enter Reason Code Status: Enter Status

Group Alert

TCD - with Cost Share Waiver (Eff: 9/1/15), Over 65 products (ie: Medicomp, Retiree, Supplemental) – Not eligible for TCD

Business benefits

- ✓ Non-intrusive integration of multiple technologies
- ✓ Reduction in call wrap times
- ✓ Increased CSR Productivity
- ✓ Improved member experience
- ✓ Reduction in call handling times
- ✓ Improved First Call Resolution (FCR)
- ✓ Reduction in call transfers
- ✓ Reduction in manual errors
- ✓ Automated knowledge management

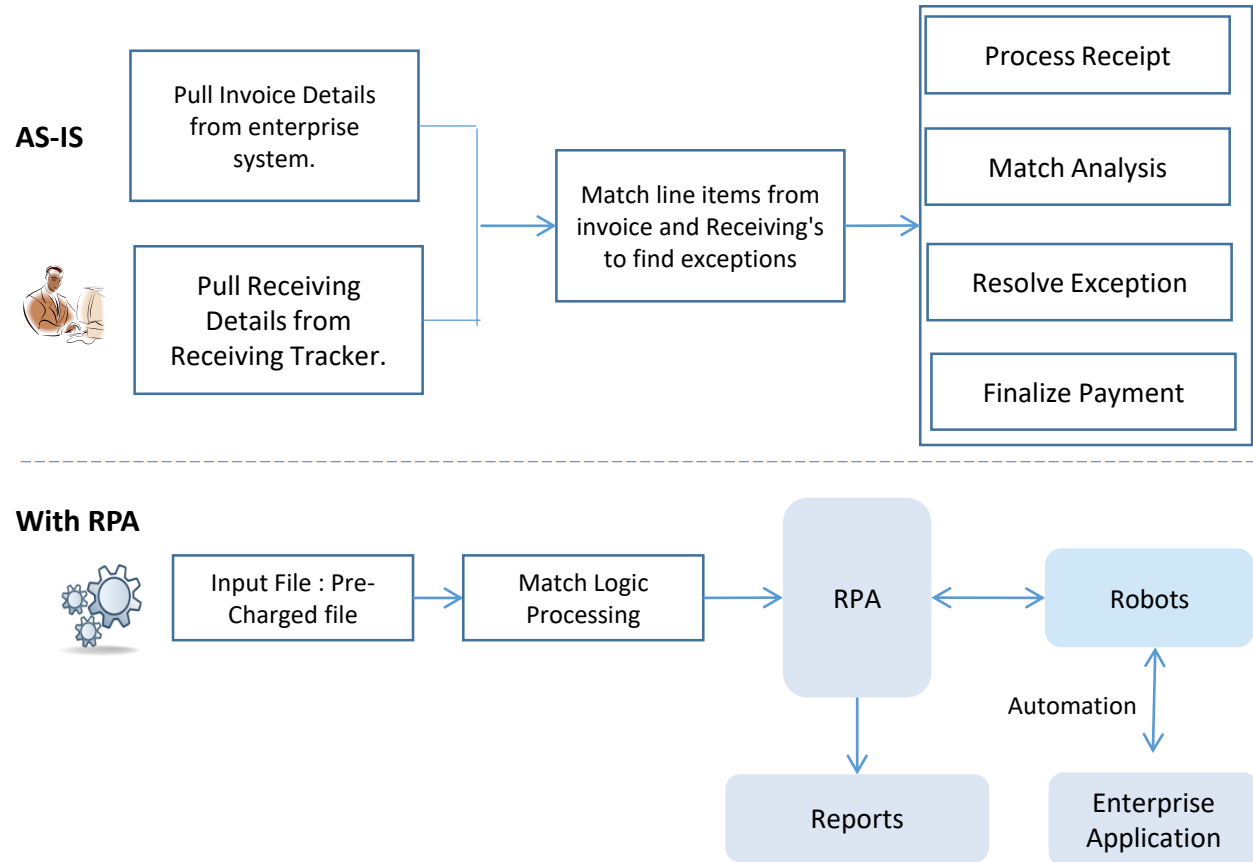
Over 40% cases automated for EDI Exception Handling Process

Industry: Retail
Client: Leading US based company (Fortune 500)
Business Function: Finance – Invoice processing
System involved: 5 - Web, AS400, excel, pdf, SAP

EDI process is to resolve Electronics Invoice exceptions occurred due to Invoice and Receiving mismatch.

Currently process is worked manually by associates. Associate pulls Invoice details and Receiving details, validate line items, identify Invoice exception and resolve exceptions.

Problem statement

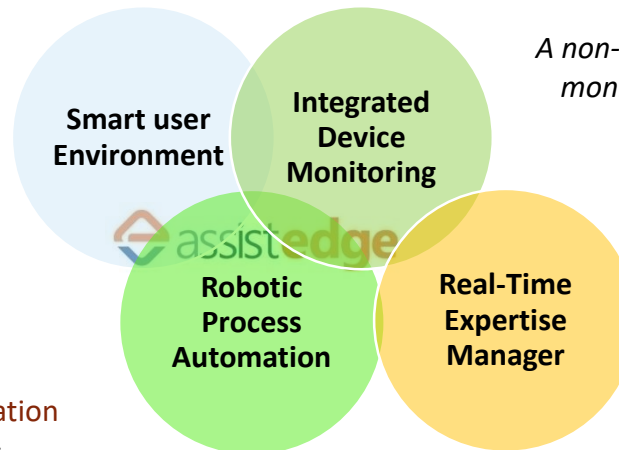


AssistEdge – Enabling service modernization by delivering an integrated experience with robotic automation

Operational productivity – Assisted automation

Unified Dashboard that non-intrusively aggregates information from disparate sources (e.g., CRM, Billing, etc.) and provides automation on demand

Intelligent Insights for automations
A non-disruptive, non-intrusive product that monitors user device activity and provides insights for automation



Knowledge capture for automations
Intelligent routing algorithm analyzes the context of interaction for expert connect and knowledge management

Operational delight – End to End automation

Automation of repetitive tasks, transactions and processes using software robots

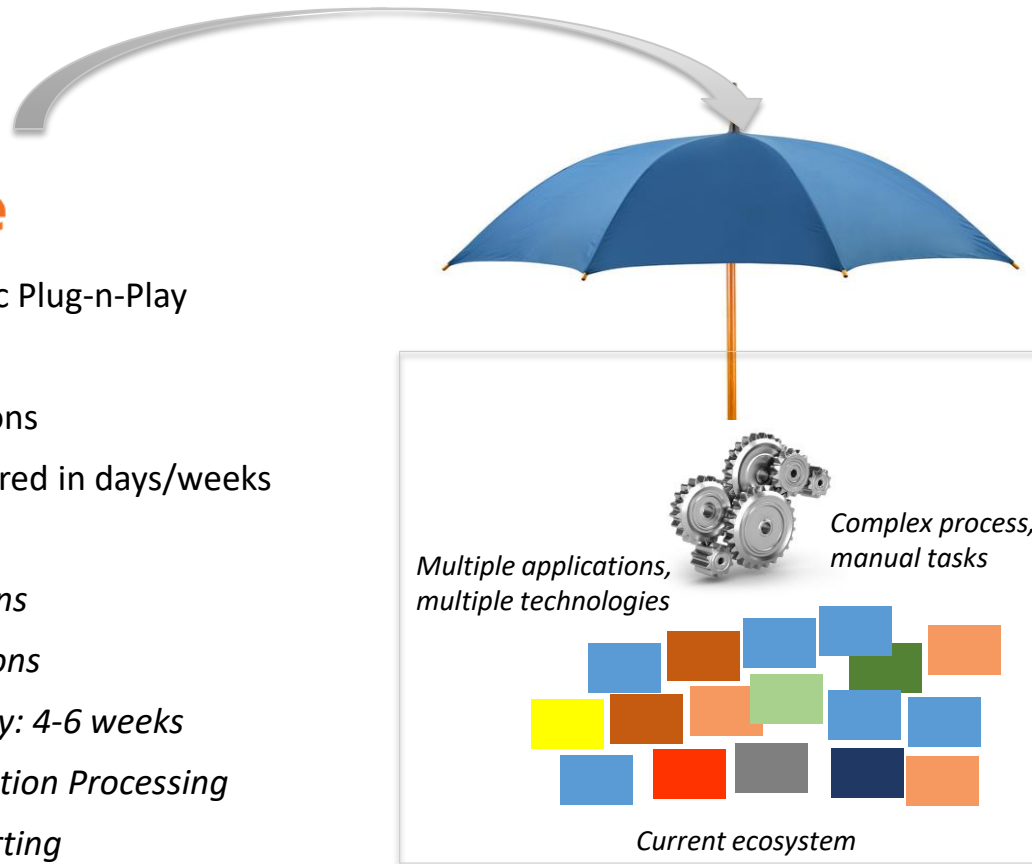
INDUSTRY AWARDS



AssistEdge provides the technology platform to automate business processes that spread across multiple systems and technologies



- ✓ Technology agnostic Plug-n-Play
- ✓ *No IT integrations*
- ✓ Codeless automations
- ✓ Automations delivered in days/weeks
- ✓ *Automated sign-in*
- ✓ *Assisted automations*
- ✓ *Key stroke replications*
- ✓ *Quick time to deploy: 4-6 weeks*
- ✓ *Automated Transaction Processing*
- ✓ *Self healing & reporting*



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