DECISIONS

The Big Picture Approach to Intelligent Process Automation

Business process automation has become standard operating practice for productivity and quality improvements in almost every organization. From simple single-user forms to highly sophisticated workflows at the world's largest companies, everyone is looking for ways to better serve customers and gain a competitive edge. No matter the level of automation in use, in progress, or planned, having a thoughtful, sustainable automation strategy is critical.

Intelligent Process Automation – or what Gartner calls hyperautomation – is often defined as automating rote or repetitive activities using artificial intelligence and robotic process automation tools. This view fails to recognize the importance of people in improving process performance and business results. Intelligent Process Automation combines document management, business process automation, task and process mining, process modeling, decision management suites, robotic process automation, and multi-experience development platforms with business rules and human intelligence.

Decisions works hand-in-hand with customers to develop and implement a form of Intelligent Process Automation (IPA) that combines human expertise and automation to deliver greater business efficiency and innovation.

Activity Automation vs. Process Automation

IPA is about moving work through processes and systems, allowing people to bring human discretion and business expertise to bear where it is most useful. Robotic Process Automation, a subset of IPA, makes individual workers more efficient by offloading tedious or error prone tasks.

True IPA is an aspirational blueprint, a vision for implementing technology that enables the path to where the business is going or should go. It involves examining and mapping internal and external processes to increase efficiencies, automate where possible, and allow staff members to focus on the work they were actually hired for – using their intelligence to advance the goals of organization versus spending time on rote tasks.

An effective approach to automation – robots, workflows, business rules, etc. – is focused on streamlining processes, eliminating manual tasks, and putting people back at the center of the business. IPA allows organizations to directly address the changing business climate, smoothly delivering services and enhancing the customer experience.

IPA is not about losing the corporate institutional memory, changing the heart of the business, or eliminating employees. IPA accelerates digital transformation, laying the foundation for long-term growth, driving business transformation objectives. It does this by allowing companies to move data between any combination of systems and people – in the ways that make your company special.

The best way to think about IPA is to "think big, start small, and improve along the way." Sharing best practices is key. Thanks to our work with customers on their IPA journeys, we've been able to help organizations leverage the best of IPA to fully achieve their goals.

For example, when Shift4, a leading provider of secure payment processing services and point-of-sale solutions wanted to bring process automation to bear to improve their processes, they used Decisions to update their custom, aging merchant account data maintenance system that relied on call center agent inputs. They incorporated all aspects of the Decisions platform: Rules Engine for routing after information is entered, Workflow Manager as an orchestration layer that ensures use of standard processes, Integrations across multiple system, and Interface Designer to easily create usable interfaces for different user groups, all with ease of maintenance and reusability. Shift4 expanded call center agent capacity by more than 3 FTE per month while also reducing input errors and rework.

The Business Case for IPA

Decisions has helped hundreds of customers design and implement process automation projects, both enterprise wide and within individual departments. We've seen what works – and what doesn't.

We've seen well-established companies spend years building labor-intensive processes and procedures, which are now preventing the business from being able to adapt and change. Their customer models, fragile technologies, and manual work are barriers to fixing the customer experience, modernizing legacy systems, and automating anything in the business. That's why start-ups are giving these well-established, set-in-their-ways companies a run for their money. This new population of digital natives is unencumbered by legacy systems and infrastructure, giving them the agility to change and grow more quickly.

IPA isn't a new concept as much as it is a new iteration on what's been happening for years.

Before there was Salesforce, there was contact management, opportunity management, lead management, and forecasting. Salesforce put it all together. The same evolution occurred with ERP systems – first materials management, inventory management, invoicing, accounting, and other capabilities woven into a single platform.

IPA does the same with an organization's business processes. IPA helps organizations achieve their larger vision, a unified system that eliminates most manual processes to enable the organization to better focus on the customer to strengthen the brand, unlock growth, and accelerate profitability. Everything really is connected. IPA is the foundation to confidently and comprehensively drive future success.

IPA & Leadership

Most major business initiatives are driven from the top, providing the organization with a unified vision for the transformation of the business. Implementation, however, is more of a ground-up activity – testing, learning, and

iterating development on a project and departmental-basis, delivering proof-of-concept every step of the way.

The best way to drive IPA success is when corporate leadership works hand-in-hand, sharing their vision for the projects with the entire organization. Together – the CEO, CIO, CTO, CFO, etc. – drive the vision into a technical reality, while always keeping in mind the fact that IPA is simply a tool to accelerate the business from "that's the way we've always done things" into a dynamic organization able to adapt to the ever-evolving business environment.

Every department plays a critical role – the compliance and governance teams ensure that appropriate checks and balances are built in: HR and internal communications teams support change management and the other key stakeholders and influencers within the organization by making the case for change. Everyone touched by the process needs to be engaged to establish the goals, the expected results, the process itself, and the role they're expected to play. Success requires honest and open communication from the organizational leadership to the department and individual levels. Managing the implementation process requires team leaders to think holistically, holding business and technology perspectives simultaneously. Leaders from the business side must think like members of the IT team, focused on the most effective and efficient ways to implement technology. IT leaders must consider every step of IPA from a business perspective – how will automating processes streamline customer and internal-facing activities?

Getting Started with IPA

It's critical to prioritize the roadmap of initiatives, starting with those with the potential to make the most impact. It's a continuous process of learning and iteration, always focusing on the future. It is better to leave some operations at the manual level initially to focus on other, more important initiatives and build confidence in the process. Change must be focused on building momentum for the long term.

IPA requires a holistic approach, looking at the key areas where it can drive the business forward, starting with key projects but always keeping the big picture in mind.

While each step of IPA should be pursued incrementally, it should not be done piecemeal. While the tendency is often to take a project-driven approach, too many disparate automation projects in different areas of the business may find themselves in conflict, whether for personnel, technology, or other resources. To succeed, IPA planning and implementation tools are best deployed across the organization as a whole.

Analysts estimate that more than half of companies have at least two process automation tools in play. It could be as simple as a form automation or as complex as integrating every system and department in a company. With this tool proliferation comes the need for greater skill and expertise to manage across tools and projects. Over time, the coordination of disparate tools becomes a significant burden. An integrated IPA strategy can weave initiatives together in a way that ensures that the parts delivered along the way support the whole.

Strategic IPA is not just integrations or activity automations. It's built on a foundation that identifies what capabilities exist now, what needs to be built, and what steps need to be implemented for continuous process improvement.

Your IPA strategy should include both process mining and process automation. Process mining uses data to analyze the health of processes – what is occurring at the crossroads of people and technology – in order to drive

improvement. This data is applied during business process automation (BPA) to ensure the smoothest path is taken. BPA is exactly as it sounds – automating business processes to eliminate manual tasks, improve operations, and strengthen customer service, among many other benefits. Process mining is also used to define new automations based on data in existing systems.

IPA covers the entire business automation portfolio. It encompasses analysis, automation, execution, and elevation across the process cycle of design, build, deliver, and empower.

Considerations for Implementation

Planning is the most critical phase of the IPA process. Each business process needs to be analyzed to determine exactly how it should be executed. It's critical to spend time asking questions and understanding the current state – and where you want to go. It's very important to have a macro view of how work moves through the organization, determining who is involved, where the bottlenecks exist, and what wins are possible. Determining what to automate needs to be looked at sequentially and incrementally. Decisions about what not to automate or what to eliminate are just as critical. The combination of input from the people doing the work and the project management and process mining teams can bring about new approaches to deliver the greatest benefits.

Analysis does not actually have to be manual. Data-driven task and process mining technologies can be used to help the IPA process owner identify and solve real-world problems, challenges, and opportunities.

Nothing should be built until mapped and understood at the granular business level — e.g., this process exists to achieve A, B, and C. It should be thorough and integrated.

For example, compliance may have previously required two signatures to initiate a manual purchase, one from the departmental manager and one from the purchasing department. An automated process may be built so that business rules are used to automatically approve a purchase – less than $500 requires no signatures, but more than $501 still requires the signature of the two parties.

During process mining, the entire existing business procedure cycle is analyzed to determine which processes actually occur, how frequently variations are invoked, and what can be automated. Automations are then executed using a standard cycle of design, build, and deliver.

True IPA is a series of iterations, unfolding layer upon layer. Leveraging comprehensive analysis, process owners take it to the next step to write applications, create automations, build bots, create rules, automate workflows, mine business processes, manage data and system integrations, and design forms and dashboards.

Complete applications may be developed, providing an end-to-end solution the company can use as the foundation of its business model or to fulfill a specific product or service. The application can be used to extend customer relationships or generate new sources of revenue.

Building automations occur when existing business processes are reengineered and digitized to improve speed, consistency, throughput, quality, or customer experience. Again, some are hybrid, semi-automated engaging people for the most sensitive or critical elements. The focus, though, should always be on how any change is improving business.

Creating and leveraging business rules and logical workflows, improving data management, driving system integrations, and designing forms and dashboards – automating everything that can be automated – removes friction and cost. Automations can also circumvent the limitations of brittle, legacy systems by creating new processes that leverage the data to improve user interface and eliminate dependencies. Furthermore, building bots is a quick and easy way to streamline and batch-process critical but repetitive processes.

Once the initial "infrastructure" has been built, reporting on the process regularly enables continuous improvement. IPA technologies generally have optimization tools built in, which allows the process to learn and "streamline" over time, improving velocity and quality with fewer errors or exceptions. With a comprehensive and continuous focus on IPA, workflows can be continuously redesigned and improved, accelerating service cycles to unlock growth and profitability – and keep the focus on the people.

Processes don't automate themselves. The most effective way to bring people into the process of automation is to make them part of the development and ongoing maintenance. The ideal team combines technologists and functional experts. Combining human contributions with system and data-driven insights creates a virtuous cycle of testing and tuning. Within the IPA framework, employees focus their skills and expertise on automating transactions and also supplement the parts of end-to-end transactions that require human judgment.

Decisions worked with a large asset management company that was struggling with poor connections and data accuracy across their CRM, cloud billing application, and other sources of customer and transaction data. The other 10% was routed to subject matter experts for review and adjudication without additional manual entry. Combining the best of both worlds yielded measurable improvements in quality, productivity, and cost.

Using an IPA platform, they wove together their master data and associated workflows to power a rules engine that automated 90% of account and transaction reconciliation.

What an IPA Platform Should Be

Effective processes are designed around the thinking individual rather than having people adapt to automation. Automation should support innovation and streamline repetitive tasks. With automation needs exploding and software programmer shortages accelerating, an IPA platform enables businesspeople, analysts, and information technology professionals to align and achieve digital transformation. Unlike traditional programming and disparate systems, most technologies invoked in an IPA strategy have a business user interface or a low/no-code capability for design. No-code is not about bridging a skill gap. It's not about having a doctor write healthcare process or a lender writing software. It's about expertise in something real. Today, no single platform can fulfill the complete promise of IPA, but it's key to choose one that can drive the organization furthest along the path.

Any platform that allows an organization to drive and thrive from IPA includes a rules engine, workflow manager, and mining agents; user-designed forms, reports, and dashboards; visual designers; rich integration capabilities; and a cloud-native foundation.

The IPA platform

- Guides examination of existing business processes

- Enables creation of rules and automation of workflows

- Makes it easy to design forms, reports, and dashboards

- Smooths integration

IPA technologies streamline the ability to write applications, create automations, and build robots to:

- Leverage employee creativity

- Automate anything possible

- Fix the customer experience

- Modernize legacy systems

True IPA extends beyond technology, it's a philosophy and a way of doing business that allows organizations to address the needs of today and tomorrow.

How Decisions Helps You Navigate Your IPA Journey

Decisions works with enterprise and mid-market business leaders, analysts, and software professionals, helping them accomplish their IPA vision. Working hand-in-hand with individual subject matter experts – loan officers, underwriters, claims administrators, clinicians, nurses, and billing analysts, etc. – we help them analyze, automate, execute, and elevate business processes.

The Decisions no-code automation platform accelerates IPA adoption by enabling automation of business processes with a focus on outpacing competitors, enabling and strengthening tomorrow's growth, and changing the way the world does business.

DECISIONS

With the Decisions no-code automation platform you can fix the customer experience, modernize legacy systems, ensure regulatory compliance, and automate anything in your business.

We help people who know what to do, get it done, and change their world.

See how at decisions.com