Imagine Austin | Automation excellence: How CoE Manager and the Pathfinder Program increase ROI -

Transcript:

(00:07) good afternoon everyone so thank you so much for coming my name is Steve Shaw the senior vice president of product for automation anywhere and genuinely appreciate everyone coming here today especially those of you who could not find a seat um the fact that you would stand this long for us like is humbling so uh but we will try and make it interesting and entertaining and hopefully somewhat interactive we'll we have time carved out specifically for being able to handle questions uh I have with me uh two folks here so Micah Smith

(00:42) who many of you know from our YouTube series Micah you yeah my name is Micah Smith I lead our developer evangelism efforts Bot games um Pathfinder some other stuff oh uh Pathfinder Academy too that's a new thing so uh everything anything that you've been grumpy about in terms of process it's his fault and we also have Mark with us Mark hi everyone my name is Mark g i lead our uh internal automation program at automation anywhere uh totally honored to be here and look forward to the discussion thank you excellent so the

(01:17) good news is normally I'm supposed to I got read the riot act about making sure that I go through Safe Harbor uh rule of thumb for me is that I like telling everyone up front when I'm talking road map and when I'm not uh all the slides that we have here today are GA so there are things that exist you can start using them right now so if you are uncertain that's the default go-to if we see something that contradicts that we will be sure to call that out so let's jump right into things so to set a little bit of context

(01:54) for everybody uh what we've observed is that when when we go and we We Roll Out programs and we see all of you roll Out programs it's been a tremendous amount of exciting stuff but putting together a program and managing a program is hard uh arguably probably the hardest thing about making you know automation work in general and the reason why it's hard is because you know especially as people coming from it backgrounds myself included I spent the '90s as a CIS admin they'll for the record they took away my root password

(02:31) in 2000 uh they also took away my check-in bit so there was probably a sign there so uh you know we're really good at technology we know how to build stuff we know how to make all this stuff run and uh all of you have been absolutely tremendous at this uh you've given us great product feedback and I love seeing it we've given us great suggestions for product improvements also love seeing that but now how do we go an operational that that's something that we don't get to learn as you know especially coming

(03:04) from an IT background so being able to operationalize that well is a skill that takes time and we've seen a lot of sessions this uh today and I think there's one tomorrow that actually talks about that I believe the previous one was specifically on that Journey what we wanted to talk about today was the tools that you can use to help you through that process there are three Tools in particular that we're going to be talking about the first tool is Pathfinder that is what do we need to do in order to go and uh put together a

(03:36) program and what are the the the kits that we have available for us the second tool we have is Coe manager many of you have seen this you've heard about it uh if you have not gotten a demo for that that is in one of the demo pods and I encourage all of you to go and check it out Coe manager every person who has looked at it has said my goodness this means the end of an Excel spreadsheet and they've been like like so happy like I I don't in all of my career as a product leader I have never had a product that has made this many

(04:07) people happy so uh I'm very encouraged by that and the last tool is actually your partners uh how do you engage your partners and what partners are out there that you can connect with that have these skills and can help your teams put it together in real life so why do you need to put all of this stuff together well this morning that you saw in the keynote hopefully you all spent the entire time through the keynote yes yes it was uh for as hard as we worked on those demos like you better have sat through

(04:40) that so what we heard about was this new system of work and we talked a lot about generative Ai and where it fit into the picture we've talked about trust and where the cloud fits into the picture the reason why operationalizing this stuff is challenging is that if you think about instead of products and Technology IES what is the flow of work that we do right we get ideas the ideas come from all over the place we have some of the ideas of our own the line of business we'll share a couple of ideas and then we start seeing them come in

(05:13) from all over the place and so we discover all kinds of new stuff that comes along through that process some of you may have process Discovery you're using that to identify new opportunities as well really interesting ways of figuring out that list but then you build this backlog and then that hard question what do I do next well the thing that you end up doing next is figuring out which automation that you're going to build and you build it and there's a bunch of great tools for being able to build

(05:40) those automations we have of course RPA which we've all know and love but we also have apis which we've been talking about process orchestration we have uh IDP these are all really powerful tools and from there we go and figure out how to scale it today we're going to really focus on that scale piece how do you go and put together that program so that you can actually scale not from a technology perspective but really scale from a people perspective the good news is that you're not alone there's a lot of people who

(06:12) are struggling with this so being able to do this successfully is its own art and I encourage all of you to spend that time to treat it with that level of discipline that you treat the product expertise with if you do that I believe that everybody here can be successful so with that I want to jump into Pathfinder and to do that the person who actually created Pathfinder Micah is going to take over at this point so Micah the floor is yours no this is great thank you and I do want to clarify a couple things here uh Pathfinder is

(06:47) not a product so much as it is a program right and it's a program designed to enable automation leaders to grow and scale their automation practices and so as much as you hear Pathfinder being thrown around yes it's the name of our community um but it's also the name of this program and uh Steve attributed the program to myself but the reality was we were asked by leadership uh what do we do and what do we tell and how do we explain to automation anywhere customers how to scale their program many will get

(07:18) through a couple Bots or a couple automations that they've created and then how do they take that to the next level and so I previously LED an automation program at TIAA I led that for several years I know what it's like to go through this I have the scars on my back of the things that I got wrong and the things that we did really well but I also created this in conjunction with Mark goodair and Mark runs our automation Coe internally and so this was the Two of Us coming up with how do we create the ideal perfect automation

(07:49) program that's operating on all cylinders and at scale and we came up with this idea of the five PS of automation maturity and uh they all start with P but they're really the pillars right first is program this is all about my program operations the metrics that I'm tracking when I talk about my program the next is people how do I think about the people and roles that enable my program enable the scale enable creating all of these automations that I'm trying to create the next is pipeline pipeline management is a huge

(08:18) deal for a lot of organizations and how I manage my pipeline how I'm getting in ideas how I'm able to optimize those ideas how I'm able to determine which is the next best opportunity for me to take on those are all really important components of pipeline production is another one production is really a PW for the way that I design develop and deliver my automations I had to have a PW so it would fit my uh memorable 5ps but this is all about the best practices in doing development and delivery how am

(08:46) I doing my design thinking about our solution patterns am I using automation Frameworks or templates do I have that consistency am I doing the airor handling the logging the log management the screenshots all of that the same way every single time and then the last p is around promotion and engagement and this is the one that I think feels the most uncomfortable for a lot of people coming from it backgrounds right I have to not only lead this automation program but I have to be able to tell people about it and get them excited about it and tell

(09:11) them about why this matters and why our organization needs to invest in this and needs to grow our program so these are the five pillars that represent uh automation program maturity now for each of these pillars we have a start phase accelerate and scale phase so if I'm just getting started with promotion and engagement or if I'm at the accelerate phase of production or scale we have guidance for organizations that are at these different levels so you might do a self- evaluation and say well we're

(09:38) doing really well with program but we really don't have a competency framework in place for people and so we don't know the people on our team where they have gaps where they have strengths where they can grow where we have gaps that we need to fill as a team so those are the different areas of our five PS Now for Pathfinder those five pillars are expressed through some of these missions and these missions are kind of the marketable the tangible ways for us to be able to talk about uh the different Journeys that a lot of our customers are

(10:08) going on and so myself and Kristen Engelhart went all around the world uh delivering these different missions to all of our customers and uh we were originally setting off to give them guidance on how to best grow and scale their automation program and that went really well but we also were able to get a lot of feedback from customers to say hey these are areas where we're doing really well or these are areas where we're actually struggling and so we accidentally did the largest study on automation programs that's ever been

(10:36) done and we've been able to use a lot of that detail to come back and reimo and reinvigorate a lot of the content that we've created so we have these seven missions these are available on our Pathfinder website if you go to pathfinder.com you'll find some links to this kind of stuff we have these missions available online so I'd encourage you to check those out but as a part of that kind of global research study that we did we were able to come up with kind of a standard or a maturity Benchmark for where our customers are at

(11:08) across these five pillars so what we did is we said all right for program Readiness for people for pipeline for production we're going to come up with what is the definition of being at the start phase what is the definition of being at the accelerate phase what's the definition of being at the scale phase and we're going to read that criteria to each of these customers and we're going to enable them to self assess where they're at it's a moment in time measurement of how they're doing in

(11:32) these different key areas and these are the averages that we saw right and what we're seeing is that people en rolls is an area where most people feel like they're struggling they don't have a good definition of what the roles are for their automation program where people can grow how they have a competency framework we also see that promotion and engagement is an area that a lot of organizations struggle with what this tells us is that there are relationships between these different pillars so for example promotion and

(11:58) engagement isow low if promotion engagement is really low for you as a customer it probably means you're also struggling with your pipeline Because unless people know about my program unless my stakeholders are really dialed in on what we're capable of what we can do then they're probably not going to know to submit ideas to my automation pipeline there's also relationships between all of these right if my program isn't capturing the kind of metrics that matter to my leadership and to our

(12:25) organization then I'm likely not going to be really good at promotion and engagement no matter how hard I try if I go to an executive and I say hey you know what we just created 15 Bots this quarter they're going to say we really don't care because we don't know what that means right 15 Bots could save me $10 million or $15 so it really depends on me being able to speak the language of what my leadership and what my organization care about so this was a great study we're going to give you a

(12:50) link so that you're able to take the same assessment for your own automation program and you can see how you rank up I would encourage you to take a picture of this though uh in case you want to see where you rank now we created this program right we also did an assessment on our own internal Coe right we didn't just come here and say we're going to give ourselves all fives and in fact no customer that we've gone over has I'm not all fives I changed the slides you're not all fives okay uh no customer

(13:18) that we have ever worked with has had all fives in all areas right they recognize that there's areas where they need to improve and we can give them specific guidance on how to mature in those different areas so mark I want you to have a moment of vulnerability here oh boy and I want you to talk through some of these scores why you say you're at these different areas and uh talk through us a little bit sure awesome so yes not all fives um I think the the first thing I'd say is like we we have a pretty high standard

(13:50) for an automation program um there there's a lot of wild ideas I get I was flying on my way to Austin getting more wild ideas and sending messages to the team um but but I think this is a pretty good reflection of where we're at and I think you know part of the message here is uh we haven't arrived so we've made lots of progress but there's also more that we can do I think um if I was to highlight a couple areas uh that I want to to pick on let's start maybe with promotion and engagement I think um we like like many

(14:18) of you uh this is something that maybe we've made some progress in but we need to do a little bit more I think on promotion and engagement we're always trying to think about how do you get people's attention and really make sure that they understand the value that we're we're delivering so what are the kind of things that we do internally uh we've got uh Communications going to our senior Executives hey look look you know what the what the team has done recently look at some of the cool use cases this

(14:40) is what we're doing with generative Ai and co-pilot so there's Communications going to Executives we've got uh newsletters so every quarter uh people like Steve or Micah would receive a newsletter here's the latest and greatest of what we're doing and what's coming soon so all those basic Communications we've got a a companywide site where we publish all those metrics and things like that believe it or or not it's not always enough even within automation anywhere uh we've got a bunch

(15:03) of busy employees busy Executives so just getting people's attention so um suffice it to say that I I think there's probably more we can do here um I'd like to see for example even better advocacy within the business units uh the difference between me you know I report through to our our CIO uh Sumit I I'm in it the difference between me singing the Praises of Automation in the marketing area versus the marketing person I can tell you it resonates completely differently um so so we want to see from

(15:32) a pro promotion and engagement standpoint we want to see the heroes that are being made within the organization um we want to see those people celebrated and and I think that's going to elevate the whole program so that's that's kind of picking on our promotion and engagement piece um I think if I think about people um Mike and know I've got a lot of passion around this topic things like competency Frameworks um understanding not only the capabilities we have as a team when I say capabilities I'm talking about if we

(15:57) were to look across all the solution patterns if we looked at the different parts of our product where are we like you know rocking versus no we're a little weak there so for example uh you might not be surprised to hear that we've got a lot of demand for generative AI use cases that'd be a pretty important capability for me to have very very strongly not you know one out of 20 people uh have that skill I want to build that up so I think there's more we can do around measuring that and also putting actions in place to make sure

(16:22) that we've got the right uh competencies in place talk talk real quick about the relationship between people and promotion engagement you said want to have more automation Champions internally advocating for your program what do we call that in the people pillar and how does that relate right so so we have uh one concept that that we have when we talk about kind of the different hats that people wear I think it's important uh in the automation program that that the message that pretty much everyone has a a place so if

(16:48) you're familiar with the C's that we put in the in the Pathfinder program one of them is contributing ideas so if somebody does nothing else other than contributing a good idea awesome we've got creators that people people that are actually delivering the automations um we've got Champions so somebody that's that's championing or that's kind of what I was just talking about being an advocate uh for the program uh being an advocate an advocate for automating more of their own process area that's also uh

(17:13) that's also awesome so recognizing each of the these different roles uh that different people can play and then celebrating it yeah and then the last of the four seas if you're taking notes is which one did I miss the consumer so consumers the people that are actually getting the benefit from the automation sorry the people that are actually getting the benefit those are consumers right yeah that was excellent thank you for going over that um so Mark I've got one last question for you and that is

(17:38) you gave Yourself four on production and that implies that the automations that you're building are are working extremely well and high impact tell us real quick in terms of building up that skill set within the organization right because when we bring on teams uh it members from outside of the company they don't always come with that skill what were the kinds of Investments that you put into place in order to make that work absolutely so uh we needed to to get a strong citizen developer program up and running at the right

(18:12) stage of our journey that was super super critical so not surprisingly probably Steve uh the the demand for new automation was more than my team could fulfill you know as a as a Coe leader um so making sure that we've got citizen developers was super important so I think that was all about first of all trying to identify who going to be a good fit for a citizen developer um I don't know if this is controversial or not not not everyone may may be a good fit to be a citizen developer um but we're looking for people that that are

(18:38) probably process oriented U people the kind of people in your finance department that do things with Excel that you never thought could be done those kind of people that are logic and process oriented so picking off those people and then of course there's training thanks to things like the Pathfinder Academy we can make sure that they go through the right training uh shout out to what's happening with the Pathfinder Academy as well some of the new courses I'll give give one example if I can if I can do this some promotion of Pathfinder

(19:02) Academy it's going to help teach people what that actually looks like to think in that kind of logical process oriented uh uh uh way that's not always obvious right so so one of the first things we need to be able to do if we're going to build an automation is be able to think you know what what are we starting with what are the steps we're going to go through and we're going to end up with an output so how do you how do you train people just to think that way um and then obviously layer on the product

(19:23) knowledge and then they'll actually be able to to put it to work okay we're on time for this awesome all right so uh I already warned them yesterday that I'm going to cut them off because this is uh we have a lot to say and not enough time to do it I want to go to the next uh item which is Coe manager and I can take over from here there you go thank you so show of hands how many people here have looked at Coe manager already that's some pretty solid that's awesome okay so Coe manager in a

(19:58) nutshell addresses one of the pieces that came out of the Pathfinder conversation and that is how do we go through this whole journey from a a tools and Technology perspective and then have the right pieces in place to be able to track what's happening so you start with say process Discovery you figure out what your your resulting opportunities are and then you go into Pipeline and delivery Pipeline and delivery is where Coe manager is now you'll notice we have not begun talking about actually building anything yet

(20:32) building comes later so what you're actually getting here is an opportunity to assess what the ideas are be able to figure out how they fit into your pipeline prioritize your pipeline based on metrics that matter to you and your business so the traditional metrics here would be what is the complexity of the automation right how long is this going to take me versus what is that return so we can build build a bubble chart for you that'll actually graph that and immediately you get a visualization that

(21:03) says Ah that big bubble on the top right that's my number one priority so the question of what's next goes away this is not something where you can argue a point in the squeaky wheel gets gets the the automation you actually get the a mechanism to go and do a prioritization based on math from there you actually go through the build process that we talked about earlier then it comes actually back to Coe manager and this is what I really love about this earlier the comment was made how do I go and show my leadership

(21:38) what the value of 15 Bots are is it 15 million or $15 with value realization we have the tools for actually tracking what that return on investment looks like so you can say you know how many processes did I uh go and run how many customer records did I process each one of these actions has a dollar amount Associated to it so now you can come back and say my automations collectively were valued at this much and you could actually put a concrete dollar amount and you can dashboard the whole thing so you can see

(22:14) visually where you stand with the program versus what you may have promised at the beginning of the year so this is an absolute win every time we show this to cios we show it to CFOs I actually got to show it to a CFO this morning lit up they go that's the dashboard I want because now I can justify going and putting more money into an automation program so this last piece of value realization big big deal so what goes into Coe manager in terms of tools and Technology well as I mentioned earlier there's the ability to

(22:49) go and collect ideas ideas don't just come from our internal teams they also come from General users so right now Mark goes and he runs his program I'm a user in his Universe right uh I'm a a user that's a pain in the side but I'm a user so he wants to go and instead of having me email him ideas he wants to give me a link to say go submit your ideas here and that way if especially if you're in a larger organization everyone has access to be able to submit their ideas you want to be able to go and do

(23:23) those value focused decisions that we talked about earlier how do I go and turn this into a chart so I immediately know what's next how do I go and figure out where I'm pulling this data from this has got to come from somewhere well it comes from control room if it's coming from control room how many control rooms do I have access to I'll get more into that a little bit later being able to go and review the return on investment and then being able to do some customizations based on that reporting so how do I know

(23:51) what features I have available to me we've got a base version of the product and and this is the end of the sales pitch by the way so there's a base version of the product that does the pipeline management and the integration with up to three control rooms and then there's a plus version of the product that does all of the stuff that we talked about and we're also in the process of adding Integrations with third parties so supporting uipath supporting blue prism supporting Microsoft and being able to pull data

(24:19) from those because as much as it hurts me and it does hurt me some of you have told me that you use another product as well so this is something that now I can at least give you the tool for being able to R track that return on investment because I'd rather see your Collective automation program succeed than to have to go and fight on a per product basis that doesn't help you it doesn't help any of us on the vendor landscape so one comment real quick on that if we can um tying this back to Pathfinder if we were to look at the

(24:56) capabilities of Coe manager that immediately helps you to basically move into the accelerate or scale phase on the way that you're doing pipeline it helps you to move into the I would say accelerate phase in your program it also can really help to inform the way that you do promotion and engagement because not only do I have data on the value of the automations I've already delivered but I also have some forecasting data and that enables me to have those conversations with leadership to say look this is what we've done so far this

(25:28) is what we'll do in the next 6 months and this is our confidence on that right and so not only am I just talking about what I've delivered the return on that investment but also looking forward uh where I plan to go and that makes for a much more compelling story for your conversations with leadership on Executive buin so Mark you've get you're customer zero for me so when we put out new releases you're seeing them first yes you've rolled out Coe manager tell us about that yeah I think uh it's been

(26:00) huge just just this I don't think you can understate the importance just of visibility and transparency and transparency in terms of what's going on uh the way we've started to use this internally is Coe manager screens get get opened for almost all of our discussions and and in in two ways and this is kind of nice uh we have kind of a Federated model so so we have a bit of healthy competition between different business areas and so Coe manager can really easily give you like a wall of fame or a wall of shame hey marketing

(26:30) person wow you know two automations last quarter let me just show you what Finance is doing those kind of discussions but just having the visibility and and as Steve said this is these are metrics that are actually meaningful you can actually have those conversations about you know what what are you trying to drive in terms of of progress in your business unit what kind of metrics are you trying to change and you can actually look back later and say these automations are actually having the intended impact or by the way just

(26:52) as importantly they're not um so we've we've had discussions in both directions sometimes we thought the automation was going to be used this much sometimes it's more than we expected we have different discussions or sometimes it's it's less uh they're not consuming as much and what a f fantastic foundation for that conversation otherwise without that kind of visibility everything's very kind of qualitative and anecdotal uh but it gives you a platform for those discussions so it's it's been a a huge

(27:15) change for us and that that analytic view has shown that the product team is number one in your your your user base obviously I don't think there's any question about that he's lying by the way finan is currently number one and I'm reminded of that in his weekly emails so uh we already talked about the Pathfinder piece I want to pause real quick because I'd love to be able to answer some questions because we've talked about Pathfinder we've talked about Coe manager partners are kind of a

(27:46) little out there compared to the rest of the conversation I'd love to hear your thoughts what's working what's not nobody I don't believe it oh turn into a yes Miss so Mark you've you've done a lot of customization why don't you to share what you've done and what's worked yeah I think um so to your point uh every the way that we've structured everything is by consumer like of the Seas it's by consumer and that's where we can always get the view uh across different

(28:36) dimensions where we can compare different business units so we have discussions also not just about automations that have been delivered or value but uh Hey marketing uh why aren't you submitting more ideas so we can look at the the contribution bit we can compare ideas that are coming in the value of the ideas or quality of the ideas and then obviously value uh later on uh we found that the the visualization layer uh has been pretty easy to customize so so in terms of being able to get the kind of charts and

(29:01) graphs the the the the dream of mine was that bubble chart that I think Steve mentioned earlier that to me is one of the most valuable things right so you you end the kind of subjective discussion about uh which automation are we going to do next what should we deliver next um so we found that visual visualization layer to be pretty easy to to um customize configure the the platform that we built the product on is from a company called shabumi in fact one of the co-founders is here uh uh so the the chumi team did an absolutely

(29:31) Stellar job of building a very flexible platform um the strength of shabumi is that it is super flexible the challenge for a Coe leader is that it comes out of the box with that flexibility what Coe manager aims to do is take that flexibility and we pre-shape it into what we've seen work the most consistently so that you don't have to be in a place where you're constantly having to do a lot of customizations what we encourage teams to do is use our Professional Services team to do those customizations uh we can help you manage

(30:06) that and track it over time and that also means that we can help you carry those uh customizations forward as new versions come out uh note that the Coe manager release timeline is different from our standard product release cycle so 30 is about to come out the that doesn't necessarily mean shabumi has a new released today so did we answer your question okay any other questions that we can answer for you yes sir I I'll repeat the question great thank you I I'd like to know how struggling is to measure

(30:52) it it's it's Callum for example how can I know if the te engagement is four or five or three point this is a Pathfinder question this is for me this is my sweet spot all right so I'm going to show you real quick I I did I forgot to mention this on our uh slide itself if you scan this QR code this takes you to our uh Pathfinder mission control and what you'll do is sign in there and then you can actually take this full assessment so for each of these five key areas we break them down to three core

(31:25) competencies and we have a definition for what it means to be at start accelerate or scale or someplace in between on all of those competencies so you're essentially answering 15 questions to get a score like this and so all of that's broken down on there and then we're actually providing custom guidance to you based on where you're at so if I'm at the accelerate phase we're going to tell you how I can get to scale right but really you want to look at where I'm the lowest because you want to

(31:49) be I think balanced is probably better than really strong in one area and horrible in another okay and then we do we are time box so we need move on to the next topic you got a lot of clicking to do there so Partners um partners are are and forgive me this this sounds like a Cheesy open but partners are super critical uh and they're not just paying me to say that so here's the thing uh when we go out and we put together these programs invariably what we find is that we do especially early on we're trying to

(32:34) build up that expertise ourselves and so we do want to learn from somebody the second thing that we learned is that there are there's inevitably more work to be done especially and as people start ideating and they start identifying new opportunities for automation using a partner means that you can on day one have a team that will be able to go and just out the gate immediately help you with producing value and for those quick wins early on to show your leadership this automation thing has a huge payoff right we can do

(33:13) way more with it than we could with other approaches or other pieces of Technology that's a big win and partners are fantastic at being able to put together a program for you like this they're also great at being able to help you operationalize your team so if you've got a great number of just really smart technical teams but you don't necessarily have a program manager as part of that a partner can help provide that so I really do encourage speaking with a partner and and all of the partners that

(33:50) we have not just the ones that are listed here uh these just happen to be the big Global ones but all of our partners have gotten Pathfinder training and so they are familiar with that program many of them have gone and customized their program or added bits and pieces based on their own levels of expertise or Market verticals they know really well and they will be able to help you in that space if there's a specific partner that you're looking for or somebody who has knowledge of your space by all means let us know we will

(34:23) help you find that partner because we've got at this point hundreds of Partners and we're in to a thousand plus so we have a lot of Partners who have a lot of collective expertise we want to help you bring bring those two pieces together uh so I'm G to ask Micah here because Micah you said that you were doing this at scale at TIAA uh and I imagine that you were also using partners and I know that we have Partners actually I'm going to go with Mark first in the interest so we use Partners at automation anywhere like

(34:57) what what's the deal I thought we knew this stuff we needed help with pathfind no we not hopefully not help with Pathfinder uh So within our internal automation program uh I actually use multiple partners um with different models as well so so back to Pathfinder one thing Pathfinder talks about is this concept of a I call it we would call it like a delivery Channel citizen development to me is a delivery Channel another delivery channel is we've got these use cases that need to be built and we would give them to a partner so

(35:25) I've got I've got one model where essentially we we've gone to a a partner and said we need some resource basically resource augmentation we got too much demand we need some additional help even the citizen developers can't keep up we need some help from from Partners uh those staff members if Steve or Micah were to interact with them they they wouldn't even know that they're not automation anywhere employees they just been blended into our center of excellence and then the other one is

(35:49) kind of more outcome based I have both of those models uh running right now with with different partners that outcome base one is more uh we profile the use case again per exactly what Pathfinder talks about in terms of how we assess the ideas and then decide which ones are going to go to a partner and we need those medium complexity or high complexity we need those delivered by by this date and they basically take them Cradle to grave for those ones they take them through the whole development life cycle um and so why why are we

(36:15) doing that um different partners I think have different competencies they've got different expertise no different than our own our own team um so different different models different partners uh to fulfill different needs but that's what we're doing right now awesome no and I think you share that very practical piece there's more ideas and more work to be done then there's capacity to do it uh partners are a great way of being able to fill that in without necessarily having to go and expand team sizes especially when you're

(36:44) still trying to justify and explain the value of something so uh questions on anything that we've talked about today because we're we're at the Q&A time and I want to make sure that we've get some questions in I want to start picking on random people if you don't ask them questions yes sir question is about my question is about the Coe manager PR um I was wondering what kind of data data point can you um extract and build um you know visualization on uh is it like just the let's say the

(37:25) number of time the B running or is it can we have like a view of the number of transaction I would say U that the the B has been processed something like that so um okay thank you uh so uh I'm going to rephrase your question a little bit uh the way that you've probably heard about uh counting the value of something especially in the automation landscape is how many times did it run the thing is is that as many of you have come back and told us because many of you are using workload manager as an example the

(38:06) amount of processing it does per invocation varies so one way of looking at it is to say per execution how much value did it generate and we can count those automatically out of the box you can associate an automation back to an idea you can show what the link is between the two we will count it up and we will turn that into a doll amount right the second approach is there's an API that you can call back into the Coe manager and you can say tick off a counter every time I do this thing and get that gets Associated to the same

(38:43) idea as a result you're able to go and create custom ways of being able to track the value of something so how many emails did we process how many customer records did we process uh we had one customer who spoke to us about the number of kilometers that their trucks were traveling uh because that was the ultimate metric of return if they reduced that count they could get uh more efficient use more efficient use was less CO2 that was real dollars to them so there's any number of ways that you can count that uh but it's a great

(39:20) tool for being able to track all of that information did we answer your question okay another question yes yes sir yeah as far as the Coe manager can you also see how long it takes to get to development and up to into production as far as where the bottlenecks might be so the how do we go and track I'm going to try and rephrase your question a little bit if you think about the whole life cycle of a uh building an automation right there's some amount of time in the ideation some amount of time that's lost to just approve approvals

(39:57) you actually have the bill time and then the deployment approvals time how do we go and track that that whole journey SE manager will let you track that whole journey from start to finish because it's date and timestamping all of those inputs so when an idea comes in to an approval of an idea you can add notes to that to say hey we're you know it's today is is uh September 19th I am waiting for you know somebody to come back and approve Pro the budget for doing this because we need to use a partner for it right all

(40:31) of that information can get tracked and then you can come back and use that as a tool for being able to say start to finish between idea to the point that we put it into production what was that Journey looking like and then all of the details that went into it are also available because you actually have detailed notes if you can add documents to that all of that information is available I'm going to take this opportunity to give uh shabumi a plug here too so the the cool thing about Coe manager because it's based on this

(41:02) underlying tool is this underlying tool is great for program management at the whole Enterprise scale so if you're trying to figure out you know hey how do I go and track a big program not just in uh the the Coe but how do I track a program across a broader use case right that is something that you can use shabumi for and we will help you put you in tou with the shabumi team they're actually a sponsor this today so I think they're on the third floor third floor uh you're able to go and and talk to one

(41:34) of those folks about what they can do with this outside of the context of Coe manager um we encourage both to get used because one is specialized and are preconfigured for this use case uh the other one is a more generalized use case yes sir I got a question how do you get to the actual dollar amount you mentioned the bub there's there's how do you get to the dollar amount with the bubble chart and in another part too I want to say is there's some opportunities that if you left them off the table you would

(42:07) lose Revenue yeah so not just the time saving so there's kind of both sides so how do you determine those numbers so when an idea comes in you have an opportunity to go and give it a value and usually that's the person who's proposing the automation I want to go and build an automation so I I asked Mark Mark need an automation that's going to go and process a bunch of jro carts right and I think it's going to be worth this much money because this is how much time it'll save me right what uh mark would turn around

(42:42) and do is let's say he builds that automation based on those metrics I provide him he builds it now he goes and tracks it and he finds out that I am an incredibly lazy bastard and I never go and I run the automation right because that's never happened before no uh when that happens then every time the bot does run you get that tracker to say how many counts do I have and you can actually compare the two values so number of times it's run is one metric as I we were talking about earlier and the other one is that API call back in

(43:16) to say how many records were processed so if I said every J card that it goes and processes for me it saves me uh an hours worth of time an hours worth of product manager time is worth this much Ergo this is how much time it's going to save so he codes it up to say count how many Jura cards got processed multiply that by the dollar amount that's what the total savings is if I never ran that automation then that or if I run it very infrequently then I might come back and say I saved $100 but my proposal was for

(43:51) saving a million dollar now we can see that Gap what was the reality in in its use versus what was the proposed savings uh and this allows you to also come back to Business Leaders who said we have to have this or our world ends you now have metrics to be able to have a a pretty interesting conversation with them about being able to take their ideas and correctly value them are you able to value that other side didn't so the manual work or you have workers but not enough to do the job and so you're just leaving Revenue off the

(44:25) table do you value that yeah so the question for those of you who couldn't hear the whole thing was what about money we we lost if we didn't do the Bob right it's a great question so we we can't count what we don't know uh it this is where the difference in the potential value versus the actual value might come in so if let's say the uh actual value is a metric of the number of cont Tax Center agents that are invoking the automation as part of their daily routine you're expecting that

(45:03) you're going to get a million calls this year in reality you got half a million calls the other half million went to some other Approach at that point unless there was a metric driven around that other approach we have no way of counting it so we can't count what wasn't done uh unless there was but you can count the gap between expectation versus with delivered yes and I just want to mention and there is a bit of customization within C manager in terms of what those metrics are you can certainly add additional metrics uh not

(45:33) just savings and cost avoidance and things like that you can add you can track whatever you want you can customize those fields yes sir one question about the co manager we we'll repeat the questional new features analyes my process Cates my sa it Genera it also receiving this but I'm exting a lot of back and forth here are 10 suggestions of how your process should be Ken is that feature coming next week or is the week after keep keep on forgetting you you you promised me uh so to repeat the question which great

(46:25) question by the way uh will Coe manager give me an assessment of the quality of my Automation and uh and will it also give me an assessment of the underlying business process so the short answer is no it doesn't do that uh it's it is there to track the program and it is there to track the ROI it does not do an assessment uh now that said what uh this is where process discovery can be very helpful right so with process Discovery if you go and you capture the whole end to end process one of the things that

(47:04) can do is evaluate what that underlying graph looks like and actually do graph optimization on that to say you know there's a shorter path here if we took this instead of that you would see an you know huge savings in terms of the efficiency of doing this work uh but that completely different product it's an awesome product highly recommended um I may or may not be biased again but um the the graph optimization is actually incredibly interesting that I did graph optimization work as part of my studies

(47:40) in the 90s and when I saw it in real life and play out for us uh that was very exciting to see so it it's cool stuff yes sir thank you so V talked about the very first block where we are doing the discovery the last block where we are showing the performance what about the middle block where we are building the Bots actually so is there any some is there something in the road map where we can integrate jira or service now for the agile methodologies or just track the scrums all those things because that will help the de managers right right so

(48:21) the being able to go and track jir as one of the to-do items on the the the program plan uh we definitely want to be able to go and get those metrics in what um but that was more in the context of ideation not in the development process uh there are great tool if you're using jira for your development process there are tools out there that will track the life cycle of the dev cycle as opposed to the life cycle of an automation program so there there's two different things um we can take the the discussion

(48:54) offline for what those tools are are but those are they're powerful but they're looking at something fundamentally different so uh so for those of you who didn't quite hear that um they're using service now for that and service now has not hit their expectations so unfortunately we out of time I want to thank everybody uh for sticking with us for this entire time uh really appreciate it uh and thank you for coming to imagine

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