(3) Imagine Austin | Delivering ROI across the organization with Process Discovery and AI -

Transcript:

(00:06) I appreciate all of you being here my name is Jason Trent uh I'm the product lead for process Discovery at automation anywhere and I'm joined by customer and partner Michael Duke from guide house Michael's going to spend most of the time today talking through the way that they've worked with customers as themselves as well as with their customers to go to implement process Discovery um but before we did that just a quick show of hands who in audience is a current process Discovery customer couple so that's fantastic a

(00:36) lot of opportunity for you guys to learn a lot of great new things today and I went too fast Safe Harbor slide I don't think actually anything we're going to talk about today is forward looking because we're talking about the product as exist today but if I happen to mention anything for product uh product related that's forward looking uh make sure you buy based upon what we have in the product today and then hopefully all of you have seen this slide in every single presentation that you've been to so far um what I'll point

(01:05) out is if you think about the total automation success platform I think process Discovery really is the entryway into that for a lot of customers it's the way that you can go and discover processes that exist within your organization a lot of customers will decide to go and take that and then do process improvement process documentation or with the new capabilities we announced this week with autopilot they now the ability to go and build generate and generate automations on top of those discovered processes so

(01:33) keep that in mind as you're thinking about all the capabilities that process Discovery will provide for you with that I'm going to turn over to Michael and let you get started thank you thanks Michael um couple things before we get started my speaking style one I'm incredibly lazy I'll start mumbling here before too long so hopefully the microphone projects if it doesn't wait raise your hand and I'll try to perk up a little bit two um I guess either Southern or redneck is my primary language English is my second so

(02:05) I may say a few things you go what the heck did he just say um so that's two and then three I do walk around a lot and I don't really pay attention to the slides so they're there for your consumption maybe a few talking points for me but if I get off track it's not a big deal I'll still try to convey the general stuff but what I would like that what that means for you guys is um don't save your questions to the end if you got a question raise your hand or or let me know cuz I'd rather this be kind of a

(02:31) conversation than uh than a boring talk by Mike Duke who you don't know so with that we're going to talk a little bit about delivering Roi across the Enterprise with software and those things around task mining process Discovery the product and artist form known as Fortress IQ um from automation anywhere before I get into it too far we love this stuff um the people I hire Bob being one of those right there in the middle trying to hide in the masses is I look for people that can walk into any environment and say you know what

(03:05) there's three things five things two things wrong with this process it doesn't matter what it is you can walk into a McDonald's and find stuff a library and find stuff that's the people we hire traditionally we would go about our business by shadowing a a a staff member sitting with them and observing them for an hour um trying to take as many notes as we could but if you've ever tried to describe your job in an hour for what you do day after day after day you're going to miss a few things

(03:33) from an automation landscape that's incredibly detrimental because when I go away I try to document it bring it back a few times I'll build then a process around what I got from you in an hour in in and in veritably it's got issues it's got failures it's got points that we didn't talk about that task mining solution however gets everything and I will tell you everything almost too much of everything um it gets every click every down arrow every little minutia that a person does on a computer throughout the

(04:03) course of their daily job we measure that over a long period of time and it's a lot of stuff so um it it has dramatically changed how my team and guide house now identifies processes for improvement not just with automation but around optimization we do a lot of management consulting things too that are not uh not automation related but we layer over top of that our subject matter expertise and we come up with things and I'm walk you through a little bit about what task mining is won't spend a lot of time on that because I

(04:35) want to get to the real world examples so hopefully you guys can ask me some questions around that yeah that's the best picture I've taken a long time it's also highly doctored and very dated although you can't tell with my haircut so again the agenda is pretty simple I'm going to talk to you about process Discovery um and and the tools we use from automation anywhere because they are absolutely fantastic um they don't pay me to say that although they should because I tell everybody in the

(05:06) healthcare industry that I run up against that it's amazing and then we're going to walk through one of my clients um where we used the task mining to solve several problems I'm going to show you a couple talk about the ROI talk about the process we went through to discover that and what we did to fix it um and then explain a little bit about some of the other things on their road map that we're working with them on 10 seconds about guide housee you can look this up on the Internet we do a lot

(05:34) of stuff um that's some more of my uh Southern twang there but the we do a lot of things particularly in healthcare the sector that I'm in it's all commercial we have a federal practice that does a lot with the dod a lot with the VA um in that space But essentially what we do is is financial optimization uh at least the group I'm in and so we'll look for areas where um in healthcare we want to improve net revenue primarily because most hospitals or provider organizations that I work with u aren't making uh super huge

(06:09) profits I think I one of the presentations I was in the other day were I think it was the oil and gas one a lot of money there I might switch Industries but um we help them improve the bottom line and try to stay solvent and viable in the market so today what are we going to do these are the objectives I had to put something on paper I don't know if we actually accomplish all of these things but um a little bit of insights into the tech so I'm going to talk to you about how we use uh the process Discovery tool

(06:41) and how that works how do you create strategies off of that uh tremendous amount of data that you're able to glean from those particularly as it relates to um process optimization not necessarily just automation but um the way we look at it is they're all coupled together it's process and Tech enable and all those things so we'll talk a little bit about process optimization and and some automation uh capabilities that come with that as I talked about we're going to look through some real world examples

(07:09) we'll walk through that hopefully that'll generate some some interest in uh in some questions and then discuss really how we go about building a road map or the deployment methodology in which to accomplish um a lot of those things so does that that sounds like Fair objectives thank you hey I'll tell everybody that works for me Bob hears it all the time time a question is usually looking for a response so I appreciate those of you that that played along all right so very simply what is process Discovery what is Task mining in

(07:42) that space there are um like with any other software there are competitors to automation anywhere and and their process Discovery Tool uh I will tell you in healthare particularly in the environment let me ask that question how many how many in here are in healthcare look I'll try not to focus on that but honestly it's all I've done for 32 years so I I don't know how to talk about anything else but the ability to take audit logs and import them into a tool are what most of the other uh Solutions

(08:14) do and that's fine if you have a very simple process like accounts payable or something that's that's really small and defined when you're trying to span something like the revenue CYO of a I don't know $5 billion Healthcare System where there's 5,000 employees across that spectrum and I'm trying to get the whole ecosystem of that defined the the process mining from a log standpoint doesn't work but a task mining does and and why it works real well is one it records as I mentioned every interaction

(08:45) people have with their daily tools but allows us to identify the high Roi options for optimization um there's there's things where we discover you know it happens once a week and it maybe worth 10 bucks and sure it's a great candidate for automation other than it would cost 10 times as much to automate that as it would to have somebody do it so it's not a good candidate but we look for the high Roi multiple million doll opportunities and task mining allows us to do that in a very functional and

(09:16) effective way and I'll walk through some of that so identifying the high use cases with a large R but what the other thing that they do that's fundamental to what we just talked about is they also allow us to identify the cases that aren't a very good candidate even though people would like to see them that do that work they're not great candidates for automation or optimization and so it it allows us to use data to explain that to our clients our customers in a very meaningful way and it and it and it

(09:45) helps a lot with building the road map prioritizing where they want to make investments and doing those things so it's it's powerful for that if you're on the side of the organization you're doing it internally it's very good at building your business cas case that you may have to present to somebody for funding and be able to show very clearly why this is a great candidate why this isn't and why this is valuable for the organization the other part is it does Define or makes it easy to define the

(10:13) automation components of process optimization and so we're going to look at a couple things where we actually fix some of their core Tech from an automation standpoint before we overlay it with RPA or conversational AI or those things so um understanding uh the minutia in order to build up to a process where I okay these 10 things I can automate these five things I can't but here's how I need to build that in conjunction so that the entire process the throughput of activity is much better that's that's another B benef

(10:44) benefit of the tool the other thing is that we were like um is it does help you build that process documentation so a native output of the tool is that it'll gives you uh workflows uh pdds or or process diagrams um that you can you can Port right over and start kind of building or optimizing the tech to uh to do those things and then the nice thing for us is because I've got a lot of people that say well you promised me $20 million where are we or how is it going to stick or a year later is it still working it

(11:16) does allow us to provide a Baseline and that's crucial because I can say I'm going to get 20 million but then I how am I going to measure that it's not a black box everybody can see where that M that money is going to come from where that process optimiz ation is going to come from and we can measure that month over month to make sure that we're achieving that if we're not achieving it we also can understand why and where we need to tweak things so um those are some of the characteristics that are

(11:40) really important from a task mining review for us and I wanted to share those with you yeah it it doesn't gather the specific process metrics from there's there's two things I'm glad you asked that because I had a little Tickler to remember to talk about it there's metrics that the tool measures time based um it took 10 clicks 52 seconds um on average per person I got 50 people doing it you can do those the math and and figure that out but where if if you're on the analyst side those things are great measurements if

(12:21) you're on the business side not really I want to know what are the the business benefits other than shrinking time and space because automation Tech optimization process optimization quite honestly in in my world is 100% about throughput and so that's shrinking the time things happen increasing the efficiency all kinds of of great Consulting words but what's the business benefit and that's where I layer in things um for those of you that are in healthcare can I reduce the denial pool so if I have um in this client well I'll

(12:55) show you the example but I'll jump ahead a little bit they had a $50 million our eligibility problem where patients were coming in saying I have this insurance turns out they had another Insurance that's $50 million that gets hung up not being able to be processed $50 million it's a lot I don't know about I've got a word for that but I can't say it because it's got a couple bad words in it but anyways so the business benefit is a 50 million the analyst benefit is 2,000 hours and I

(13:25) like to think about the throughput component is incremental the business benefit is typically exponential and so you need to combine those two things but thank you for asking uh that question so a couple things that are native in the tool that are that are really helpful is they do document because all these clicks that I was talking about are all these interactions that somebody's using turn into uh steps in a process and it it can intelligently start saying hey we did this 400 times 200 times it was this pathway 100 times

(13:58) it was this pathway and then we had some variants out there that were that were much smaller and it can share you show you where people are spending the majority of their time if you have the process or I'm sorry the subject matter expertise of that part of the business you can also see where they're wasting their time because just natively some of that looking at the clicks the screens and those things you might you might discern that the 200 which is the greatest volume pathway that's what we can

(14:24) automate except that process may be crap um you might look at it and say let's take those 200 and automate those what if you shouldn't automate those to begin with what if the process should only be two steps and it's 800 steps so there's things like that that you want to you want to make sure you apply to it the tool allows you to do that because it actually shows every step every end point um on how you go about that one of the things that we do it's twofold again I'm going toe myself a little bit but

(14:51) that's all right I already warned you I don't follow the slides too well the we take a look at um what I call Broad swath process Mining and and we'll take from the from the time a job uh an indicator of a job logs in so I'm Mike Duke I know my initial my login ID and I'm a biller I got to get bills out the door that's what I do all day we will follow that person from the time they log in to the time they log out at the end of the day and we'll take all the things they've got and jam all together that's the

(15:22) that's the Mac macro process that we look at while we go through that we'll see things that we have questions is about then we'll go back to screen signatures um which are very specific screens and we want to endpoint for those we'll then dig in and micro that that process down to where we see either failure points or opportunities for automation opportunities for optimization and we just want to want understand why um I'll give you an example um Health Care followup I have to I have to go call insurance companies

(15:54) or go to a portal or somehow investigate a claim that's not paid um we were doing a macro follow-up process and we noticed that several hundred times in the in the 10day study that um somebody was using snippet why in the world you would use snippet a multiple times in a day when you have all this stuff in Epic and it's optim you know you got work cues and all this things what we found out is on Monday the manager would come in take a screenshot of the counts she wanted her people to work and then would email

(16:24) those in the macro we wouldn't have seen that but we did see some things that snippet and that popped up we're like well that's weird and so we dug in a little bit deeper and found out that their work CU scoring and their work que optimization had not been performed and and there was an opportunity to do that so that's that's what the process variants in the a paths allow you to do um and I an approach for us is is kind of that twofold some other native things that are in the technology is they do help us

(16:53) identify um automation this is the metrics that I was talking about you've got time based you've got volume based um a lot of those things on on the throughput that I mentioned that this the software is fantastic at giving you those metrics and you can say gosh this was done over 10 days by three people it took an average of two minutes if I extrapolate that over a year across the whole group of 30 people there's a lot of time spent doing that um and those are things that we want to try to optimize or automate so it's very good

(17:26) at giving a step breakdown in in a variety of way um the dashboards are inherent in the product I'd like to see a few of them optimized change a little bit um got to talk to that about the guy with the guys but uh there's some things there but you can also um connect with powerbi and and other tools if if you'd like to to to do further analysis and then like I mentioned it does spit out all those things that are at least from a process consultant are really important to us is all the documentation that supports hey these

(17:58) these are the three paths I want to automate can you dump those um to supporting documentation so I can begin coding and do those things that are important from a optimization or automation standpoint any question on the the tool and how it's used or anything on that before I move on go ahead yes day how how are you handling like privacy concerns from like works councils yeah so um particularly in healthare we got Phi if that gets out it's a huge fine so that we've got to protect a lot of that so um you can you

(18:42) can block certain sites if you if they go to Amazon on their lunch and you don't want to see that you can block that stuff um you can also redact the um critical data fields if you want to we we try very hard not to do those things because it's all in a a hip a secure environment their whole security Protocols are are state-ofthe-art but um we need that if once you start going back in and trying to sample and understand it if you're missing some of that then then you worry passwords and things like that though are never

(19:12) captured so I don't know your credentials or or any of those things from a security standpoint it's less about pii and more about like German Works Council prevents us from watching employees and what they do um so I don't know how like can they turn on the recorder when they're doing a process and turn it off yes they do have you can set it um that's the stuff that Bob handles for me but that you can set it so they can uh turn it off and that's one of the notes we have on one of the the examples

(19:42) I'm going to go through is the one of the users turned it off uh when they started their day and then turned it on back at the end end of the day like we weren't going to notice uh but you so you do get a flag when they when they disable those but they they have the ability if you want to set that to where they can turn togging on and off as they go I'm many of look atas we can also go and not record those screens as well and say I want to Whit list the number of screens I want to record maybe I only want to record sap

(20:21) Excel workday things like that and so it's only it's only recording those screenshots and the rest are ignored got another one let me ask which has good enough from a GPR perspective we also have data centerr I was just saying Germany's been problematic and we're working working our way all right I just Germany has been challenging for everybody that does what we do right and it's just a matter of it's not a market that's been accepting as well actually the whole doc countries even Switzerland has been

(21:23) problematic at times but it's slowly turning I just uh We've had conversations but it's a long arduous process to get the uh to get approvals but it is slowly changing but we're happy to chat with you and it's it's really not just overseas either if if there's a couple clients we have in a union environment uh the union um pushed back and said no we don't want you recording our people mostly because they were afraid we'd start counting all the ticks on their productivity um but so we

(21:53) we got stopped in that instance as well yeah this a question about the Tool uh I know this is is a for integration into uh automation anywhere right so the process analyzer that I've used before that was tightly coupled that's within uh automation anywhere so is this the same way that it launches from the control room and it's handled in there or is it a separate module it's it's currently separate we are bringing the product more natively into control room so with a re refresh we actually just

(22:24) brought in all the automation Weare branding and so we've renamed it process Discovery and in the future we'll we bringing into the control room and and you know kind of building a tighter a tighter coupling across both products got it so at that point we'd be able to connect the process and the bot that came out of the process a lot of that will come through that autopilot uh capability that we announced on the keynote yesterday where we actually take the PDD into Coe manager and then from Coe manager allow us to go and generate

(22:51) a bot all of our management and recording around the execution of that bot will be serviced up in Coe manager ACC and other places like that got it so that ties everything together exactly yeah great question was there one more in the B well there's a couple here go ahead thanks sorry if I jumped the line I have a question about how if you put the recording on the employees device for the full day how do you differentiate when they start and stop particular processes um for the most part if they're I mean unless they're shared

(23:21) we've had a few right Bob that are shared devices but for the most part they're when they when they're at the end of their ship we'll know what those are um so we may not get the last little bit they do but we we can set it by the time scale I mean like they're probably not doing One Singular process time after time the whole day so how do you know when they are doing one thing versus another task that's on their responsibility it's pretty neat um if I could I don't have any connectivity to

(23:47) our sandbox right now but you can actually see some of that because it starts tracking the the tool is really smart and it starts tracking like activity basically and so if you're going into the um you know the follow-up work list for epic again in this example we start tracking that by the screen capture or the uh screen signatures is how we kind of package them up and it knows every time that screen signature is hit we want to grab that from a start point and that's a follow-up process so we kind of Define it that way when we're

(24:15) building the mines the mining runs yeah any more before we move on got I I know we touched on the the Regulatory and the the union here but when you're approaching this with the team what kind of conversations do you have about the focus on process optimization versus individual Performance Management yeah um so you don't monitor everybody that's the one thing because if you would AA will break the bank on selling you licenses right Chris um so we do about 10% of a team so it's not everybody it's

(24:57) not forever and the question we get a lot every client is what do I tell my staff this is going to do because they're going to be worried that they're going to mess up or they're going to get their wrist slapped or something and we really do tell them we do that same thing we do when we do a process observation historically before we got the tool we would sit at the desk the person would have the same concerns we're just here to make your life easier we want you to operate at a higher level we're going to take a lot of the mundane

(25:25) things out of your life the things that cause you a lot of pain and ax we're going to remove those in order to do that we need to do this digital Consulting well that's actually how we'll present it is this is a digital Consulting observation not a we're going to record everything on your screen observation and it it it still causes some Ang but we generally get around it uh I just have a quick question so I work in the financial industry and we work with a lot of pii data um is the data that's captured stored in the cloud

(25:59) on a premise do you have a choice it's stored on the automation anywhere servers where that actually I have no idea for customers that have data privacy issues we actually have a capability that we call the Privacy enhanced Gateway so it's actually a service that you deploy and manage within your infrastructure all the screenshots are sent there and then redacted uh the only thing that we store within the process Discovery Cloud are going to be those redacted screenshots everything that's unredacted the

(26:24) original screenshots are stored within your environment and you can Purge whenever you want to too yeah thank you great question and the other nice thing that's about that you know given all the stuff we've gone through in the last what couple years um where everybody's now remote or or a lot remote it's fantastic for for studying remote employees um and what they do and how they do it so a little bit on that for this client so this was a um West Coast Health System mediumsized Health System

(26:51) I'll say and again we went after about uh 10% of very specific job functions they had it they wanted us to study very specific things and so the process of how do we communicate that how do we start talking about this so that we can get it deployed um the first thing we do is in introduce the concept because this is this is still pretty new um to a lot of people particularly Healthcare is 20 years behind at a minimum of every other industry on the planet including goat farming I believe but the so we have to

(27:22) educate them on what this is and what it does and why we do it so that's the first step then we talk to them hey we only want 10% of a specific functional area a specific job function okay you got 10 people here okay that means one one is not enough let's do two but we work through that and we select the users I mean we try to you know most of the time a manager knows who's my best people who's my not so best people um and we want a mix of those because we would like we really do want to optimize

(27:51) the process so we don't want just everybody that does what they think is a great job we also want a few of those that might not be doing such a great job so we select the users we deploy that to their machines we work with the local it uh group they just push it out to desktops virtual or otherwise um that really takes I want to say it takes about 15 minutes but um it's basically pushed out next time the person logs in it's active and they there go so it's a really easy lift from the from an IT

(28:18) management um perspective we like to run about 10 days two working weeks um or I'm sorry two weeks 10 working days uh that usually gives us enough we could probably get by with five but but you know I'm old school and I'd like to have more than than more is always better than less in my world so um we try to get 10 days if we can that kind of covers us if somebody's off for a day or two they call in six something happens we still get enough data from the collective group and then we the the uninstall is

(28:48) just as quick as the push out so um again it's pretty light pretty easy process once we get agreement to move forward and in this example for this uh organ organization in their patient access for you guys that aren't familiar that's the people that check your preds for they're going to verify your insurance and those things I talked about earlier but also the registration when you come in and you stand and they ask you your five million questions about uh all the things about you that's

(29:13) that that's that group and the the numbers in the black circles are the number of of uh staff members that we we monitored him and coding and revenue Integrity this is where they put in all your charges uh your medical coding that gets the claim paid make sure that's done correctly we take a look at that and then the back end where all the fun work takes place with I Bild claims there's a lot of corrective action that goes along with that I do a lot of follow-up on claims because insurance company sorry if anybody works for an

(29:41) insurance company they never pay the bill uh denied accounts this is where we get very specific denial reasons um well let me rephrase that we get very specific codes for denial reasons we very rarely get very specific reasons for denials and then payment variants they only had a couple payment variant people this is where I typically expect to get paid 100 bucks I get paid 75 and I want to know where the $25 went so that's the that's the process that we used it works very well for us in and again the 10% number is really a

(30:14) cross day process a major process like this this is a a relatively um pretty good mix we are deploying now though I think this was total of 50 let me check my math total of 50 we're doing one now we're we're actually looking at much greater numbers than that um it's a much larger organization means there's going to be a lot more clicks and stuff to look through but that's typically uh the setup and process for that so what comes out of that so that those 50 people 37 machines because there was some

(30:47) duplicative use of the the logins or not the logins but the uh machines that left us with 1.4 million interactions I call them Impressions automation any anywhere likes to call them events events to me is something that seems very uh concrete mathematical um not a lot of ambiguity The Impressions to me are more of what in the heck was that person doing and so um I like to talk about them as Impressions instead of events but those are all the interactions these are the numbers per those job functions that I mentioned um so a good sampling across

(31:22) that 10 days there's no way ever in my 32 years of doing this that I would have able would get that much information sitting and talking to somebody about their job um so it's it's incredibly important for us those volumes it's incredibly important that the tool packages those together in like routes or like paths um because we're looking at a lot of stuff now the middle screen is more for an analyst kind of view we don't use that very that graph um first and foremost if any of you guys use a

(31:50) pie chart we need to talk later because it's the worst visualization of data ever but this tells us the applications they use I really don't care um I care about the pathway and the process I don't care that they had to hit epic 500 times I expect that because that's in their job description so we we get all this initially this is a summary View and then we start we really start digging into it um and cleaning up we got to clean up the data we've got to create mining runs of the data we've got to create some

(32:20) butterflies and visualizations of that data and then we've got to start applying our subject matter expertise to make some darn sense out of it that just sums up the Six Bullets on the left but what we what we really do is um much like I mentioned we look at the screen signatures we we'll try to make some uh uh out of the macro runs we'll try to find some common processes and then break those down we'll put people together so we know based on their job function you know um back to this so I I

(32:50) know the one HB variant person what their user ID is we can track that so we'll group people with the same uh we'll group their user IDs in the same job function then we'll mine that so we can see everybody doing that similar job where all the combinations come from on the on the pathway that that usually takes a little bit of work uh it's not too much but it it's invaluable because I'll have a few people that are oh on Tuesday I was doing follow-up I wasn't really doing billing oh great um so we kind of got to

(33:24) dig into that a little bit deeper it's not as quite as clean as we would like and then we'll kick all that once we got those groupings or those Cycles then we'll kick off the mining runs and that's where the the the system starts packaging up like activities like screens like users and puts them into something that's useful and meaningful from a process Discovery standpoint we'll do a lot of review of those we'll then break them into uh the opportunities by functional area so we you get some data like this and this is

(33:51) actually um from this client you can see on this pathway I think this one had a total um 396 204 followed the same path high high uh likelihood of potential automation there it also took them is that minutes that's how much time the 204 path took or the same steps in that pathway took and then we can start really build breaking that down into meaningful this is where I said maybe see here that only went 19 times out of 396 may not be a good candidate for uh automation so uh it it it gives you this stuff natively makes Bob and I

(34:31) look a lot smarter than we really are particularly me he's actually brilliant um so we can start packaging all that once the data is cleaning then you can get some outputs that help you make some decisions all right so a real a real life example so we had um on this account 394 times over a 10day period by the follow-up team which I think was five I can't remember seven where they would go out to a portal this made me ill when when we saw it they would go out to an portal they would look an account went epic they

(35:11) would get that account information they would then go to a portal and look up that information for that Acclaim get a status of it which if you get a status you should probably take whatever actions required to advance that status to adjudication hopefully payment they were not doing that they would then come back into epic add a note add an activity close out the account and defer it they would manually defer it what we mean by that is I want this account to go away nobody sees it for X days hopefully something happens to it it

(35:39) doesn't come back to me and I don't have to work it anymore not that they were really working it to begin with that happened 394 times for seven people over 10 days 85% of those followed the same two paths and actually once we started looking into it those same two paths could be compressed so you I should have done it before I got here but I think my quick mathod is what that's 330 somewhere in that range 335 335 times out of 394 we could automate that we didn't use any RPA for this we got uh extracts ran

(36:14) it through their Experian Clearing House got a claim status um back electronically not all it was useful but most of it was we then repopulated the work cues with that information and based on the priorities we could put on based on that status they were then resorted inside the work CU or if it was things like going to pay in 14 days we would defer it for 14 days so people don't have to touch work the day and half to work that's process optimization using uh fiq or or process Discovery we're able to find th those type things

(36:49) this is just one example of where we were able to optimize their epic environment based on all the things we saw in the process Discovery Maps so that that was a very valuable one um because again this 394 across 7 I think total they have remember how Bob 50 or so something like that so you extrapolate that over a group of 50 you're saving a lot of time so that's that that efficiency that throughput the incremental value that I was talking about that's one where it was actually worthwhile because those people could

(37:23) now do something more valuable with their day hopefully chasing accounts for real money another one we came across is um the eligibility status within epic is wonderful so they tell me uh they got a tool it's called realtime eligibility where you can go and check if whe whether I'm eligible or not however as you can see these are actual screen grabs they would come back and say they're eligible however their ID number changed that's going to fail when I build it I'm not going to get paid um there's some other things there where

(37:59) they gave us additional information but they were we were not updating the system with that Intel what we were coming back and saying yeah they're eligible so nobody ever worked it nobody ever did anything that failed to the point of $50 million over 12 months um some would be verified so that what we found through the screen grabs is that a high number were coming back as eligible 54.

(38:25) 8% to be exact but of that 54.8% a lot of them had alerts at the bottom that were not being updated in the system and therefore we were having issue where we'd have to rework those you that don't know how this this goes I bill it to the wrong insurance they come back and tell me that's I don't have that patient I do the research and you well you used to be Medicare traditional now you're Medicare HMO all right I should have caught that at time of registration but I didn't well now we optimized rte1 so we fixed the things in Epic that you could

(38:53) fix but secondarily not all of that works um RTE doesn't work with every payer so those that are not um fixed in RTE predominantly those that are not Medicare from a chaining perspective we launched um or we're launching conversational AI where we will actually call a payer if we can't find on a portal we'll call a payer with a bot and we'll bring that information back and we'll use the RPA to either update the system or take an action if required and so we're leveraging two types of automation to help really drive

(39:27) down that $50 million of rework again for those of you who don't know a denial there a bunch of different studies to work a denial like an eligibility which is fairly simple to correct and resubmit it's anywhere from 118 to 125 bucks give it take to fix that well you do it over a bunch of claims it's $50 million you're paying a lot of money that you really don't have to because we should just never have it in the beginning so this is an example of exponential gain because we're fixing the process on the

(39:58) front we're leveraging the core Tech that exists where we can and then we're launching conversational AI bort uh portal access and RPA to uh significantly drive down that number a couple additional opportunities that that we've explored and actually build a road map for them all of that's generated off of the task mining so everything everything that we've got here this we don't have to read through I'm not going to read through this um it's it's available for if you want but

(40:32) these are the other areas if you recognize the job functions that we talked about so these are some of the other opportunities the two that I expressed I wanted to talk through the again the incremental approach and the exponential approach and the differen isn't that from a task mining uh Discovery but these are all on the road map to implement and it's been uh such a success we're now doing task mining with uh supply chain General HR functions uh reimbursement uh department and we'll eventually move

(41:00) into um HR payroll as well so same it'll follow the same pathway we'll do the task mining we'll identify opportunities and we'll deploy whatever um process or Tech optimization or enablement or automation that is most appropriate for that problem what's it take to do that and then this is my last slide and you guys can ask me anything you want you can stay as long as you want or you can vote for the door go grab a beer or for those of you got to get to the airport good luck to you um what does it take for us

(41:32) to do that given that we now use the tool we can be done and this is this is an elongated time frame um we could probably do all of that work in about four weeks but we like tell the cli8 weeks just in case we run into hurdles um we're doing one now where the screen captures weren't working so we had we lost a week there so we we like to build in a little bit of buffer but everything goes well we study for the two weeks we analyze for two weeks we present findings on the the opportunities and the in the ROI for the

(42:04) business and that is all I have thank you any questions no we got a question here so like you said the timeline is two weeks is what you take for capturing the process what about the challenges and errors that take place rarely and that is outside of two weeks and yeah like maybe monthly or yeah our most of our processes that that we deal with or two weeks I you know it really be I think it might be have to be something that if if it's a process that you're more uh intimate with maybe it's less maybe it's more um there's some simple

(42:48) things that we can do like we think um uh AP that type stuff could probably just a couple days we also think things like Financial close might have to be two months run because we've got to we want to see the month end process and then potentially the yearend process so that I wouldn't buy I wouldn't worry too much about that two weeks you'll get a feel for and if you don't have enough information you can just you going to turn it back on and start running again so okay there's a question in the back oh

(43:18) um I was going to ask if you uh saw any Improvement in the time for turnaround so since like with Discovery Time time like is it faster to release automations now and how much time did you save in that regard um so we're we're just now for this client we're just now deploying that um this except for the stuff with epic we optimize that that's I don't know Bob if I don't have any of those metrics for that but um we have them I just I don't have them in here um and I don't do any of the hard work so you'd

(43:50) have to ask while is there question in the back no yeah yeah how um I'm curious how often do you see or do you see clients use this to measure incremental process improvement over time and or to ensure process governance once changes happen yeah it's that's a fantastic question because uh we're looking to provide that as a service but you could uh individually if you had the licenses that that's a big component of what we're trying to present to the market is let's go in we'll optimize and then

(44:28) let's come in every six months or whatever the time frame feels right to say let's do it again and not it does two things so it's it's it's process governance where you didn't deploy automation to kind of take that work out of the human error cycle that happens to all of us because we are human um maybe hung over who knows whatever the day it brings but there's also um did the did the automation break uh while we're while we're measuring again we shouldn't see say a worker doing some of these

(44:57) tasks cuz we thought we automated all of it and well it maybe systems down or what you know things that happened to us through the course of using technology we want to see those things too um from a automation governance as well as just a process governance great question hey Mike um the total estimated um projection for financial outcome uh for that particular use case uh what was that number so across again this was just the one example um I don't I don't know on the the uh the efficiency one because we're not really not concerned

(45:35) with that what what we track are either first pass denials predominantly because that even that helps with that um but also uh AR liquidation so as instead of just statusing now we're doing things in automated fashion so we can press the AR curve we're seeing a pretty dramatic reduction what it's actually at it right now I don't know it's in the millions from the efficiency gain um from the uh the the uh uh denials not just around eligibility but the other denial work we're doing on the front end we're

(46:09) hoping to see about a 10 to $15 million reduction is is what we're trending um or what we've modeled out we're not quite there yet but that's what we're shooting for from two Dimensions uh accuracy and time compression on the Discovery how much manual effort would it have taken to do that work without fiq how much of that manual effort and air were we able to pull out yeah yeah so depending on the process we're looking anywhere from 20 to 70% along those lines so there's a lot of things because of the the coupling um

(46:46) EUR All Tech with the voice Tech that we're using we're looking to take all as much of that work out as we can it's going to be significant uh numbers when we're done and ask me next year because we'll be through it at that point yeah I'm curious when the um digital Consultants running on on a user's machine and and they do something invisible right so they bring up a screen in whatever and they just look at it they don't really do anything with it they just look at it and then go over

(47:14) somewhere else how does it deal with that it it actually captures it so it's um because you've got to click to open that and so we're presented with that screen and then they have to click to go somewhere else and and it shows that how does it know that it captured like a date you know that that it's using that that person's using to make a decision so is the question how does it captured in the field or yeah like how does it know okay you know this user looked at this date and they made some

(47:43) decision off of something on the screen that we don't have any interaction for you won't yeah so we capture interactions through keyboard events Mouse clicks several different kind of facets around that that we get from the that's where that's where why I was was calling it Impressions because if we saw that 100 times right we would then take a look at that screen and say okay here's the 10 items on that screen because we know the processes so well it's where like the what what on Earth

(48:08) would I use those 10 fields for and then follow the path after that and say oh well they were using it to verify that they got the patient's phone number or something so um it does take there's a little bit of that's the art to part of this that you've got to know at least in my opinion you've got to know the process fairly well if you really want to op imize it Mak sense question in the back and again on that I'm I'm a r cycle guy so when we do Finance projects I pull in our finance

(48:37) people when we do um uh HR I'll pull in our HR people because I don't know it that well so I can do the I can do the time studies and all that but I really don't know the process well enough to say hey this what's going on here right that's correct yeah he Mike how are you hey there um question when you say four weeks which you tell your customer eight right um how much what's the staff makeup to get that done in those four weeks and what is the skill set of that staff makeup ah so there's soft skills and there's

(49:12) there's Tech skills the staff makeup right now even for very large ones is probably Boba and two of our Junior consultants and they're really uh really smart guys um me being the exception um that know the tool and can break it down and start building those things out and packaging up the findings but it's it's not a team of a hundred um particularly if you know rep cycle is pretty complicated process for us so we can do that in two weeks we can do a lot of other processes probably faster but um it's not a large team for

(49:51) for for us at least but again we now have we got a high Comfort level with the tool and we we do understand the work very well so it's it's quicker than maybe just a general analyst that doesn't know the work as well yeah sure anybody else awesome well thank you guys very much we appreciate joining thank you very much thank you [Applause] Michael

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