THE COMPLETE STARTER GUIDE

TO
RPA

FOR THE OUTSOURCING COMMUNITY

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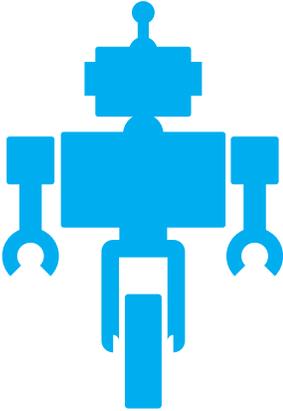
The Complete Starter Guide to RPA
for the Outsourcing Community

Why you're hearing about RPA now

The outsourcing landscape as we know it is changing.

Chances are you're well aware of many of these changes and disruptive forces: digitization, big data, analytics (particularly in areas like cybersecurity), and increased reliance on the cloud.

If you're familiar with those changes, then you've also likely heard about the newest wave of technology infiltrating BPO and shared services. One type of technology entering the common BPO lexicon will become increasingly recognizable as it seeps into shared services: robotic process automation software, commonly known simply as "RPA."

Automation is already pervasive in our lives—from tried-and-true mechanized assembly lines to the dawn of self-driving cars—but these invisible "software robots" present in RPA software are what's happening now. It hits on all cylinders for businesses looking to reduce costs, decrease errors, improve efficiency, become more agile, and up their productivity game. Which is why customers want it.

We've created this guide to not only explain to you what we're talking about when we advocate for this rather nebulous concept of "robotic process automation," but also show you why it has become an essential technology for the outsourcing world to adopt—one that has changed the world historically, and is continuing to change the world today.

When you're finished reading this, we want you to come to a conclusion: Robotic Process Automation isn't just something you **can** offer. It's something you **need** to offer.

But before you come to a conclusion, you need to have an introduction.

Let's dive in.

Just a few commonly automated processes

Procure-to-pay

Quote-to-cash

HR administration

Claims processing

IT processes

Report generation

Sales and invoice processing

Customer relationship management

Inventory management

Data migration and entry

System integrations

Answering the million-dollar question: "What is it?"

Put simply, RPA software is a digital ape.

RPA software has often been referred to as "macros on steroids." It records actions a human takes to complete a computer-based task, and then replicates those actions as many times as necessary and at a very rapid rate.

But, here comes the performance-enhancing part:

It can navigate different digital landscapes: RPA software adjusts itself to handle changing environments, movement in icons or buttons, differences in screen sizes, and a host of other variants.

It's built for complexity: This type of automation software isn't designed to complete "tasks;" it's designed to complete processes—including complex ones that would require thousands of lines of script to automate.

It's meant to be used at an enterprise level: RPA software is best used when it's deployed throughout an enterprise and enabling multiple departments to focus on value-added work—not just on a single computer running a single macro.

It's non-invasive: Instead of messing with custom programming or direct integration coding, RPA software integrates on the front-end for easy setup and smooth passage of data between systems.

It's quick to implement and quick to scale: Users can be up and running, automating tasks in literally minutes with RPA software, and the ease-of-use lends itself to proliferative use throughout an organization by both business and IT users.

It plays nice with other systems: Users should be able to create automated tasks that utilize all of their line of business systems without a single hiccup. We're talking 1998 legacy systems, ERP, cloud applications, Microsoft, their Spotify, everything.

It includes features that foster "fast work": RPA software should at a minimum include features you need to create and run tasks quickly and effectively. Among these features should be wizards, drag-and-drop commands, a clean, friendly user interface, and integrations with everyday-use systems like Excel, SAP, Citrix, etc.

And the other million dollar question: How are BPOs using it?

To offer differentiated solutions to forward-thinking clients
Nimble, flexible, innovative providers are what customers are seeking out. If you're finding avenues through which you can provide them with the technology they need and want as a part of your overall services, you're more likely to obtain and retain customers, and be viewed as a provider that can successfully embrace emerging trends and harness their potential to serve customers better.

To control costs while contributing to top-line growth
RPA software offers both outsourcers and their clients a viable way to produce economies of scale, generating revenue by focusing teams on value-added work while reducing operating costs, and growing exponentially as a result. What type of cost savings are we talking about? 25-50% according to the Institute of Robotic Process Automation.[1]

To deploy smaller, more high-performing workforces
Automation allows you to offer an alternative to the traditional labor arbitrage model that we're all familiar with. Your "bot workforce" is ready to do any repetitive task around-the-clock and without error. And there are compelling reasons to adopt, like estimates that offshore FTEs cost three times more than implementing RPA.[2]

To give customers a "single source of truth"
Data integrity in today's data-driven world is top-of-mind for companies everywhere. To get the information and then the business insight they need, your customers have to create information causeways between systems, and that can be a time-consuming process that's prone to error (and potentially puts them in the hot seat with their customers). Your ability to offer an automated, plug-and-play solution to these problems will give your customers just another reason to say "yes" to your services.
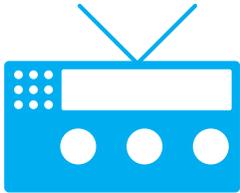
[1] http://www.irpanetwork.com/benefits-of-rpa/
[2] http://www.prnewswire.com/news-releases/blue-prism-genpact-and-automation-anywhere-partner-with-shared-services--outsourcing-network-for-robotic-process-automation-285348351.html

Types of automation software

**The way we see it, automation solutions break down into 3 pertinent categories:**

1. Macro recorders

If you have several simple tasks to automate (filling in forms, populating information from a text file to a spreadsheet on a daily basis, etc.), a spunky macro recorder might be the right tool to do the job. These types of recorders are not necessarily suited to grow use of automation in an organization, but can do the trick if it's being used to run a single task on a single computer (continuously refreshing a web page, for instance). A free or low-cost macro recorder will likely not be able to handle complex scenarios, nor will it allow users to easily edit scripts.
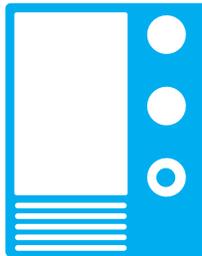
2. Application-level macros

A number of macro recorders are specifically created to work in certain applications or programs, like Excel or Windows. Because of that, they are highly effective at automating tasks specific to their parent entity, but the challenge is clear: if you want to automate outside of those applications or programs, you likely won't be able to do so effectively.

A main difference between application-specific and enterprise-grade automation is scope. With comprehensive automation software, you essentially extend the value of automating in one application, like Excel, to other applications like Word, your CRM, ERP, the web, and more, thereby multiplying the time-savings and error reduction you experience by automating one application already.
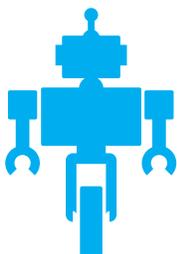
3. Robotic Process Automation

RPA is software that creates software robots. Representing the future of process automation in enterprises as well as outsourcing entities, RPA takes into account that the world is moving increasingly towards automating tasks that are better performed by computers and allowing the human workforce to focus their attention on tasks that require creativity, judgment, and personal interaction. Typically RPA solutions give organizations the ability to automate on the front-end, making for fast implementation, and hedging bets for user adoption. RPA software should actually supplement human work in a meaningful way so that companies benefitting from automation can also benefit from more value-added work from their employees.

Want to chat with an expert about what you've read?

Automation just happens to be our favorite topic! We've got automation experts standing by to discuss your unique automation ideas whenever you'd like.

Call
1-888-484-3535
to get in touch.

You've got a handle on RPA. Now what?

Now tcomes the important part.

Time to consider: What can you do with RPA? And what does it mean for your business? As a unique provider of outsourcing services and solutions, how can you implement this game-changing technology to better serve your customers, while also running a leaner organization yourself? The possibilities for this software are endless, and the current applications are only scratching the surface of what will happen in the next decade.

Time to see it for yourself. Here's how:

You've got the concepts behind automation…now try it out yourself, no strings attached. Automation Anywhere provides a free trial of its automation software—just visit: https://www.automationanywhere.com/try, download, and go.