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THE AUTOMATION JOURNEY OF 4 LEADING BRANDS

BEST PRACTICES & LESSONS LEARNED

How Innovative Leaders Built
Scalable Automation Programs

PREPARED BY: **RPA**Today

> *Do you remember the Borg from Star Trek: The Next Generation? Well, RPA is like the Borg. Resistance is futile, every organization will find ways to assimilate RPAs into their processes.*
>
> - Jesse Carrillo, SVP & CIO, Hines

RPA may really be like the Borg—pulling all organizations into its automation collective, making them much more productive and efficient, freeing up employee time to focus on business sustenance and growth. But, that eventuality is not as inevitable and easy to achieve as many observers have made it seem. While investment in automation solutions has grown explosively over the past few years, the reality is that it's unfamiliar to many. Even businesses that are convinced of RPA's benefits find implementation challenging.

During the pandemic, economic devastation shook many industries around the world, and RPA not only survived but thrived. Due to pandemic-induced automation demand, Forrester recently reported that the significant RPA market growth in 2021 will continue throughout 2022 and beyond. Forrester predicts the RPA market will be worth $22 billion by 2025[1].

Evolving Business Strategies

It turns out that businesses in survival mode saw automation as a lifeline during the pandemic. Automation enabled organizations to control costs, quickly spin up remote work forces, and in some cases, stave off the difficult decision to furlough or lay off valued employees. As organizations regain their footing in 2022 and beyond, businesses will remember the lessons they learned during the pandemic to try to better prepare for future disruptions. This must include RPA as part of an enhanced automation strategy.

Even before COVID, business leaders could have been excused for thinking the RPA market was more mature than it actually is. News of its growth, its inclusion in digital transformation discussions, and the entry of enterprise software giants like Microsoft and SAP into the market, have garnered ever-increasing attention to the technology at conferences and in business-focused publications.

Yet, the automation journey for most companies is either in its infancy or hasn't begun at all.

1. Report: The RPA Market Will Grow To $22 Billion By 2025, Worldwide, Forrester, Feb. 2022

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The Automation Wave Begins

Finance and accounting departments were among the first business functions to grasp the value of RPA as a tool to automate labor-intensive, manual processes, especially in their reporting. But then again, a recent survey found that more than 75% of these early automation movers acknowledge that their organizations' processes still are mostly manual[2].

The vital questions companies need to ask about RPA, then, are: How do I start? What processes should I seek to automate first? And, what assistance do I need?

## Yes, RPA Can Benefit Your Company, Too

Financial institutions and insurers were among the first to recognize the power of automation. Enormous back-office operations processing the information for hundreds of thousands account holders created innumerable manual processes. These extremely repetitive processes filled the time and deadened the spirit of human workers prone to boredom and mistakes.

Mailing statements and processing account openings and payments were the "low-hanging fruit" of these industries that pioneered the use of RPA. But RPA, like the Borg, has extended its tendrils into an unimaginable variety of business verticals and corporate functions.

Healthcare, commercial real estate, higher education, oil and gas, transportation and logistics, retail, telecom, government, and even restaurants are industries where RPA has made real inroads. Corporate functions within all these verticals leveraging the technology include: finance and accounting, human resources, customer service, IT, sales, and more.

If you're starting from scratch, identifying the right processes to begin with, evaluating the right solution, and implementing a pilot can be daunting.
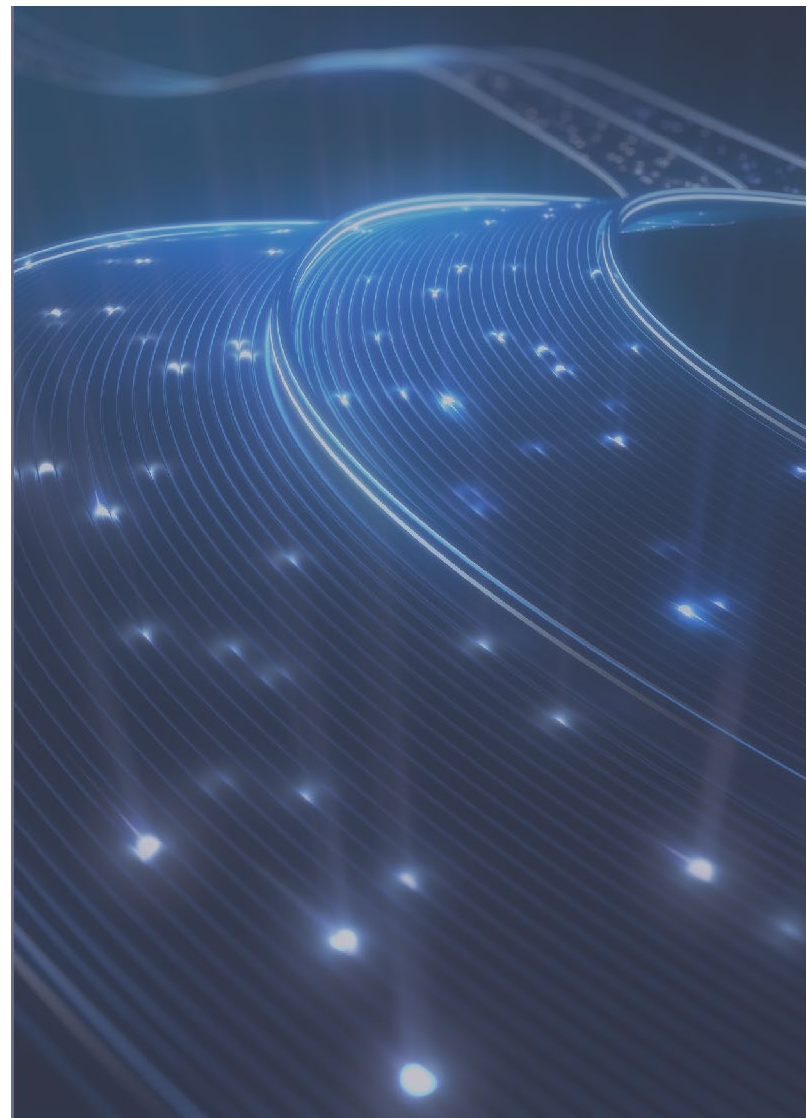
2. From Mirage to Reality: Bringing Finance into Focus in a Digital World, Deloitte, Sept. 2020

The Tale of 4 Beginnings:
Hines, Weingarten, Whataburger, & Texas DIR

RPA has spawned a movement around "citizen developers"—technologically inclined leaders or members of business lines who hear about RPA, and its potential to free up resources or reduce costs. These people often begin to educate themselves and tinker with publicly available automation resources.

While RPA has democratized technology in this way, it has also caused tension in some organizations if IT is bypassed. By and large, business units initiate, own, and grow the automation journey. IT departments are often are the entry point for automation, and VPs and CIOs are the ones building a business case for its introduction and implementation.

Technology leaders are finding there are no universal approaches that will guarantee success and ROI as they build and scale automation programs within their organizations.

Hines, a global real estate investment, development, and management firm based in Houston, Texas, is a sprawling company whose CIO, Jesse Carrillo, prefers an entrepreneurial approach; building solid relationships with his business line leaders and supporting Citizen Developers who set the agendawith new technologies.

"You know your processes better than IT," Carrillo explains. "Help us identify some technologies you think may help you and bring us to the party early. Let's work alongside one another, as opposed to feeling like you have to go off on your own."

Carrillo has established a group of business line managers and leaders within Hines for exactly this purpose. His Business Technology Group has taken the lead company-wide on RPA.

Hines

Jesse Carrillo,
SVP & CIO

WEINGARTEN REALTY

Huy Nguyen,
CTO

DIR
Texas Department of Information Resources

Krishna Edathil,
Director of Enterprise Solution Services

WHATABURGER

Sylvester Johnson,
VP of Strategy Execution & Business Transformation

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Weingarten Realty's CTO Huy Nguyen, who holds the same job in the same industry as Carrillo, preferred to keep his first foray into RPA small and within his firm's IT department.

"We are not the most technologically advanced company always looking for the latest and greatest," said Nguyen, "Executive buy-in was a challenge for us. However, we were able to demonstrate how RPA could address some traditional challenges we had, especially since we outsource a lot of our data entry work."

Starting small with a project he could control, rather than bringing in the business lines immediately, was the first step Nguyen took that made a huge difference for Weingarten.

Automation for Every Industry, Every Function

In the public sector, RPA has an opportunity to make an "immense impact", according to Krishna Edathil, Director of Enterprise Solution Services (Cloud/AI and RPA) for the Texas Department of Information Resources (DIR). State governments have emerged as a proving ground for RPA technology. With 180 different agencies and more than half a million full-time employees, Texas is one of the biggest. That means Edathil is always thinking about efficiency, and RPA was on his radar from the very start.

"The benefits of automation struck me while I was doing project work with the state, long before I was running this department," Edathil remembers. "There was this gentleman working with the state, and all he was doing was consolidating reports, manually compiling spreadsheets from different entities by cut-and-paste. A co-worker then showed him how he could use a simple technique within Excel to cut that task in half. That has been in my mind ever since I took on this role. How can technology work for people? That was one great example."

Whataburger, a fast-food chain based in San Antonio, Texas with nearly 850 locations, conducted a formal review of its financial systems strategy that led them to adopting process improvement as a priority.

"It's not earth-shattering," says Sly Johnson, the company's Vice President of Strategy Execution & Business Transformation, of the review. "It's a critical part of every organization."

But, thinking of the review led one of Johnson's team, who was involved and knowledgeable about the company's processes, to investigate RPA on his own, and that team member "saw it as a way to start taking advantage of process improvements we had identified as part of this overall major effort."

So, the journey often begins in different ways for different companies.

There are, however, similarities among these disparate examples: Each had to prove the worth of RPA to their bosses; each started with a small, easily achievable project; eventual collaboration with business lines proved vital; and early success in one area of the company has demonstrated to others in the organization that RPA could work for them, too.

The underlying key to success all four organizations have in common is they formed a partnership with an outside consulting company to advise and guide their early efforts: Smartbridge.

4 Case Studies: Initial & Future Projects

Nearly every discussion of RPA pilots and early-stage efforts refers to the term "low-hanging fruit." While there might be manual processes most companies can easily identify, sometimes it's notreadily apparent, or you might have to choose between several likely candidates. Here are some examples of initial projects that can serve as inspiration for the first step of your automation journey.

— Hines —

Process: IT Accounts Payable
The process was done bi-weekly for more than **15 vendors**, averaging **1,200 invoices**, and **600 hours** per year. Now with intelligent automation, the process utilizes machine learning and AI to scan, upload, and process the AP invoices.

Results: 90% time saving's ROI, saving 540+ manual hours annually, freeing up several hours each week to spend on customer service.

Next: As the company opens a new headquarters, it plans to digitize as much of its existing paper record-keeping as possible. Carrillo says bots will be instrumental in that process and will deploy intelligent automation to their other business units.

— Weingarten —

Process: User Provisioning
Nguyen wanted to start with a small project he had complete visibility and control over. The user provisioning of technology, account access, credentials, and information for on boarding new employees is an IT function that was highly manual. The provisioning involved 9 platforms and required multiple people in tandem.

Result: Provisioning time was cut on average **from three to four days to several minutes**. The project proved essential for showcasing RPA to management.

Next: Nguyen was able to implement subsequent automation projects in the accounting department including automating, preparing, and sending invoices to customers.

— Whataburger —

Process: Accounts Receivable Reconciliation
An employee in the finance department saw an opportunity to automate a manual reconciliation process across their 800+ stores, educated himself on RPA, and got IT on board to try it.

Result: 85% time saving's ROI
Johnson says that initial foray created a stakeholder who could evangelize RPA within the company, establishing credibility, understanding, and buy-in. The RPA Center of Excellence helped launch the automation journey and begin realizing ROI delivered by the automation bots.

Next: RPA Center of Excellence will unify and align internal messaging about RPA, leverage key data and analytics in an organizational way, and create a structure and governance that will enable Whataburger to scale its automation program effectively.

— Texas DIR —

Process: The state often must dispute bills with its telecom providers within 21 days. Verification of the bills is a highly manual process involving cutting and pasting from spreadsheets. Staff were even performing this on their own time because of the potentially significant cost savings and time sensitivity. The department in charge was experiencing attrition because no one wanted the task.

Result: In a state the size of Texas, small changes in telecom payments resulted in significant cost savings. A successful proof-of-concept is moving into production.

Next: State and federal government RPA programs have been extremely effective at scaling. Edathil has numerous projects on tap that can move forward now that proof-of-concepts have been successful in several cases.

Automation Journey Best Practices from Smartbridge

Smartbridge has assisted each of these companies, and many others, as they started and expanded their automation journeys. With years of developing and implementing successful automation programs, Smartbridge has yielded several best practices that dramatically increase your chances of deployment success.

1. **Make automation a strategic priority**

2. **Focus on people as much as technology**

3. **Establish Business-IT alignment**

4. **A culture of business innovation and technology is important for accelerated adoption**

5. **Develop an operating model that enables scaling (RPA Center of Excellence)**

6. **Understand RPA is one tool for process improvement and automation, not the only tool**

7. **Define a scalable, low-maintenance technical environment**

8. **Align with a strategic automation partner for success and sustainability**

A Partner is Key

Why would aligning with an outside partner be the best course of action? Sometimes, companies have no idea where to start. Sometimes, as was the case with Whataburger, a staff member becomes excited about the idea and brings it to the attention of management. Whether you're at a dead stop or you have taken some action, working with an experienced professional can accelerate the pace at which you get where you want to be.

As Texas DIR's Edathil explains, part of the attraction was having a partner there who could get you to crawl, walk, run, and then progress beyond that to fly.

"Speed is critical in our organization," he says. "You have a small window of time to get a proof-of-concept done, train, get budget for a pilot and operationalize. We needed a partner that would treat us as a priority and get us ready to fly fast."

In addition to speed of deployment, an experienced partner such as Smartbridge can help with unfamiliar challenges. These challenges include increasing initial success and rapid results, building and maintaining enthusiasm among corporate leadership; identifying processes appropriate for automation and establishing a Center of Excellence for those that choose this governance structure.

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At Whataburger Johnson "...wanted everything associated with all of our planning, all the analysis and insights that we do with our restaurants, all that we do for the corporation, consumer interfaces, everything under one discipline. We need to stabilize this and build leadership in the organization. We were able to set up the right structure and approach working with Smartbridge."

Okay consultants deploy your bot and leave. Great consultants will help you navigate the various options you have to solve a problem, choose a course of action that will result in the best outcome, implement a governance structure to set you up for success, provide training for every citizen developer, educate key stakeholders and executives, and be there with you for every step of your automation journey.

Conclusion

Like the Borg, Carrillo opines, RPA is an inevitability. The ROI shown in pilot after pilot has CFOs and CIOs salivating. Getting from that point to one where the technology has scaled throughout your organization is challenging. But starting, as the companies here have shown, is a matter of education, will, strategy, and aligning with the right partner for long-term success.

About RPA Today

RPA Today[SM] is the independent voice of one of the fastest-growing sectors in digital transformation for businesses. Our Robotic Process Automation[SM] publication, covers this billion-dollar industry in the midst of unprecedented growth. RPA Today charts the technology's continued progress with original content coveringthe people, companies, trends and stories that light the path for participants in a brand new space.

We strive to serve every constituency in the RPA ecosystem from end-users to software providers to technology partners to consultants. We stand apart from these stakeholders with a mission to provide themobjective and trusted news, information, and education vital to growth in a nascent space.

RPA Today represents decades of combined expertise in automation, technology, content creation, and B2B media. Our experienced staff provides comprehensive, consistent and ongoing coverage of the exploding intelligent automation, hyperautomation, AI, and RPA market.

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About Smartbridge

Smartbridge focuses on simplifying business transformation. We apply thought leadership and innovation to bring our customer's digital agenda to reality.

We partner with customers in their journey from vision to adoption, and across the plethora of technology options available today. Smartbridge's comprehensive list of technology and software partnerships gives us the freedom to remain an objective collaborator with our customers. The suite of Smartbridge services includes: Automation, Digital Innovation, Data & Analytics, Cloud Modernization, Applications Integration, and Custom Application Development.

Smartbridge provides professional services for companies at all stages of their RPA journey. We partner with the top leading RPA vendors, UiPath and Microsoft Power Automate, to ensure the most successful implementation for your investment.

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