

# SUCCESSFUL ROBOTIC PROCESS AUTOMATION IMPLEMENTATION - BEST PRACTICES

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With Robotic Process Automation (RPA) expected to disrupt back-office operations in banks, financial institutions, and insurance firms significantly over next 12-18 months, the early implementation experiences are enabling providers like Mphasis to define best practices. These have been compiled from lessons learned from the initial implementations and many pilots, and a distillation of what works and what does not. We hope this will help minimize the risks and pain in your RPA journey, and help you realize the potential of RPA.

RPA projects are very different from IT projects, as we now work with the business/operations team directly to build an automation solution. The methodology and best practices that apply to IT application development projects do not directly apply to RPA projects. No body of knowledge is yet available around on how to approach RPA implementations, how to minimize the risks with RPA projects and how to get greater success and results with the RPA initiatives.



## Sponsorship

- RPA initiatives should be sponsored by business and CIO should actively support it.



## Preparing the organization

- A boot-camp is to be organized for all stakeholders who will be engaged in the RPA projects to help them understand how the projects work, and what role each one has, and what best practices and lessons learned are available from past experiences.
- Change management for the post RPA phase, when the robots and humans are to work together – how the work will be measured and monitored, how the unplanned scenarios will be handled and what structure may be appropriate for the post-RPA operations.



## Tool and process selection

- The tool selection is a decision that involves 5 aspects – the complexity of the deployment environment, the attributes of the process, the overall RPA strategy – whether desktop automation or a longer-term view to include cognitive automation over time, which are then matched with the tool features – and then evaluated against the automation costs, automation saving potential and the payback period.
- Process selection for the pilot implementation is a key decision as a failed pilot can set-back the RPA initiative by 2 years easily.
- Defining the RPA business case for scaling-up the program needs to be done by taking a sizeable operations headcount that is planned to be covered with RPA deployment. The selection of the processes can be guided by a simple thumb-rule – any process that is a candidate for outsourcing is a good candidate for RPA.



### Development environment setup

- The development environment setup is another key decision that impacts the development productivity and the time for deployment of the RPA solution. The development environment and the connectivity needs to consider where the developers are located and if the development will be done over virtualized environment and how it differs for production environment.
- Development is recommended in a hybrid model with onshore and offshore team-members working to optimize the automation implementation costs and to get a quicker payback.



### Change control

- The changes that impact the production environment – changes to system software (windows, internet explorer, Citrix), changes to LOB systems, and changes to the tool software itself will all impact the automation software and will need to be proactively managed for compatibility and tested well.



### Tool partner involvement

- It is important to have the chosen tool vendor involved closely with the RPA program, as the tools are still evolving and there would be technical challenges where the tool vendors help will be required. Also, the tool vendor can take inputs from the client environment to bake into product roadmap for new features.



### Objective from RPA

- This is a key question to answer before embarking on RPA journey – what is the strategic objective behind implementing RPA that goes beyond cost reduction? Is it improvements in customer experience? Is it process transformation to leapfrog beyond benchmark industry performance on those processes? Is it adding cognitive automation over time?

We at Mphasis have worked with multiple clients and analysts to evolve our point of view to help guide and advise our clients with RPA implementation – from the initial pilots, tool selection decisions, process selection for pilots, setting-up of a RPA CoE for the clients, industrialization of the RPA program to scale and business benefits targeted, and successful execution of RPA projects.

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## Author Profile

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Sanu Samuel heads the next generation automation team at Mphasis focused on automation solutions for operations, IT infrastructure, and IT applications development/maintenance. He has over 20 years of experience in IT services industry, in roles across multiple innovation initiatives, lean six-sigma improvement initiatives and deliver capability & maturity improvement initiatives. In his current role he is working with clients to help chart their automation journey and guide them to successful realization of results and transformation.

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## About Mphasis

Mphasis (BSE: 526299; NSE: MPHASIS) applies next-generation technology to help enterprises transform businesses globally. Customer centricity is foundational to Mphasis and is reflected in the Mphasis' Front2Back™ Transformation approach. Front2Back™ uses the exponential power of cloud and cognitive to provide hyper-personalized ( $C = X2C_{in} = 1$ ) digital experience to clients and their end customers. Mphasis' Service Transformation approach helps 'shrink the core' through the application of digital technologies across legacy environments within an enterprise, enabling businesses to stay ahead in a changing world. Mphasis' core reference architectures and tools, speed and innovation with domain expertise and specialization are key to building strong relationships with marquee clients. To know more, please visit [www.mphasis.com](http://www.mphasis.com)

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