What is RPA?

What's the difference between a hammer and a keyboard?

Not a lot – both are used to perform MANUAL work

What's the difference between a hammer and a nail gun?

The nail gun makes the human 20-100x faster

The nail gun becomes a personal robot?

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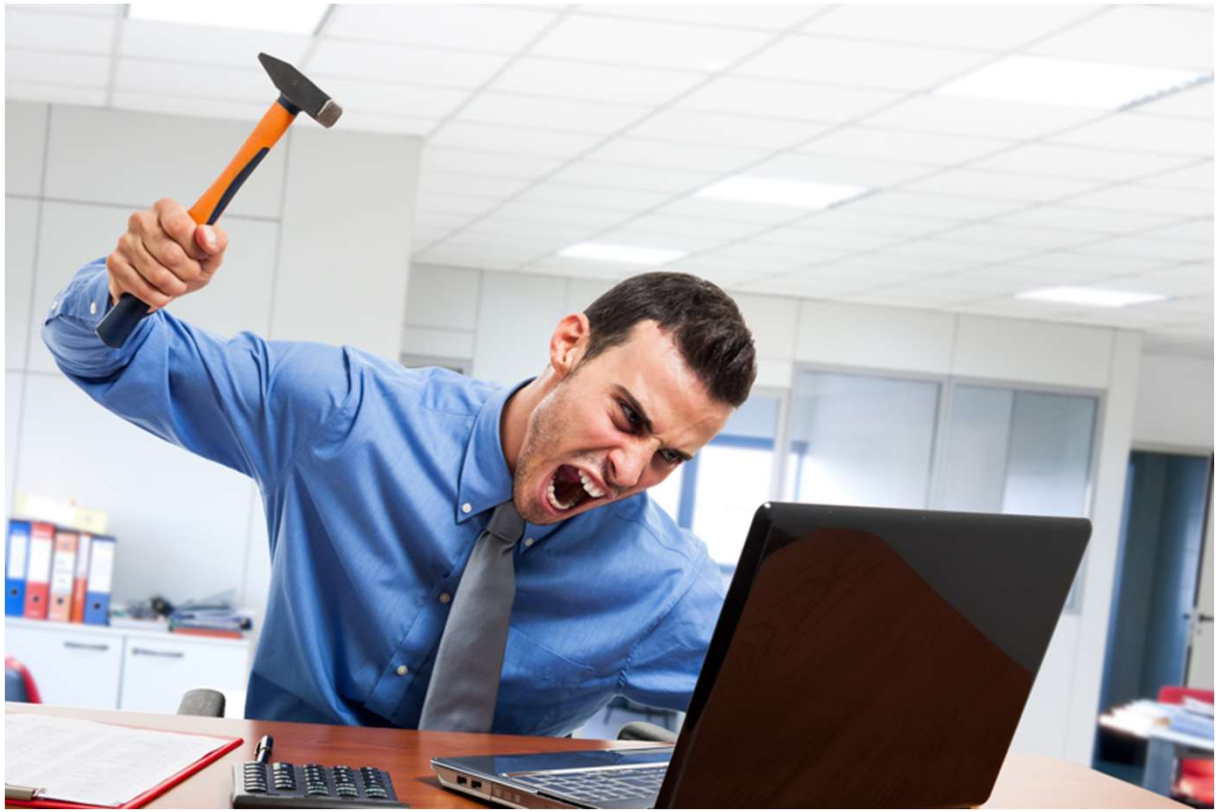
What if – every desktop worker was given a hammer?



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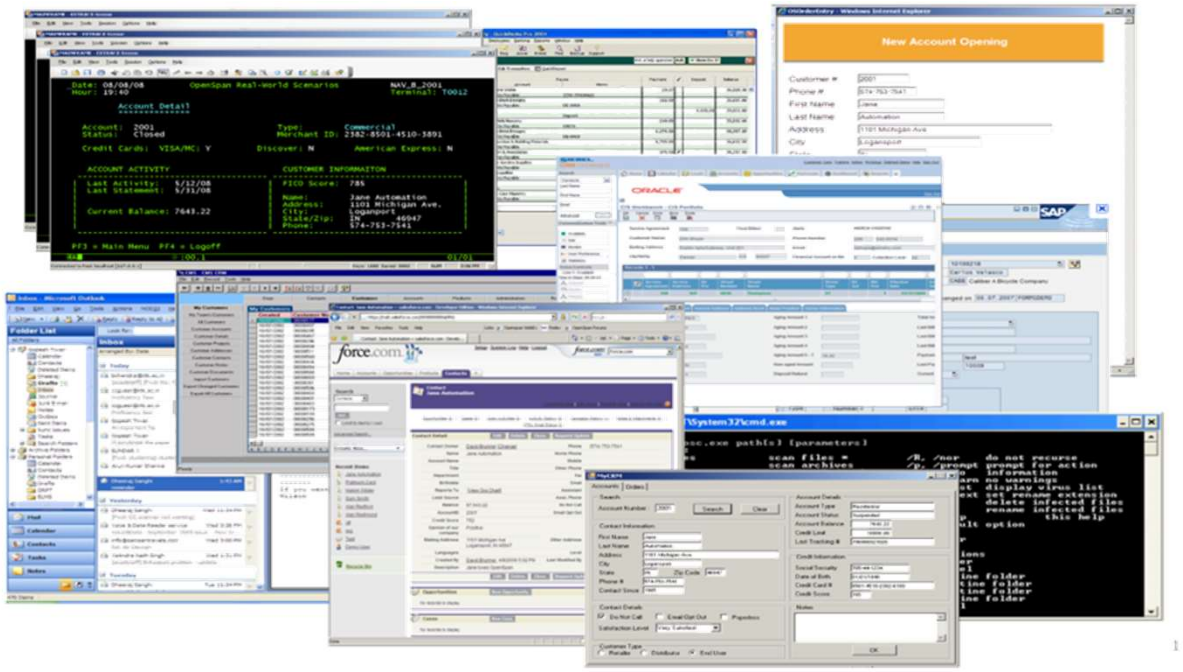
Or better still, give them a personal Robot? Attended RPA (RDA)

What problem is RPA trying to solve?

Many tasks remain manual – Desktop Users lost in a maze of applications



- Cluttered desktop results in:
  - Higher AHT
  - Poor CSAT scores
  - Low FCR (and more rework)
  - Slow new hire onboarding
  - High / costly error rates
  - Complex UIs / variability
- 3rd party and old legacy applications can be closed to integration
- Transformation takes time
- Replacing existing applications slow

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But beware of the traps

Up to 50% of RPA projects fail[1]

Only 8% of RPA projects have reached scale[2]

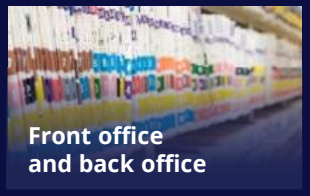
90% don't think they are maximizing the capabilities of RPA[3]

1. *Are you ready for robots?*, EY, 2017
2. *Automation with Intelligence,* Deloitte, 2019
3. *Business Case Planning for Robotic Process Automation*, Infosys, 2019

Scale RPA with a hybrid approach

Start with RPA attended for quick wins

RPA Attended: agility for scale in weeks



- Humans and robots working together
- Exception handling and human decision-making
- Deployed to 100-20,000 robots per enterprise

RPA Unattended: filling in the gaps

- Independent worker bots
- Rules-based work with no exceptions
- Deployed to 10-100 Robots per enterprise

RPA projects often focus on the few tasks where **100%** of the work can be automated...

...but what impact would be achieved if **20% - 50%** of worker desktop tasks could be automated?

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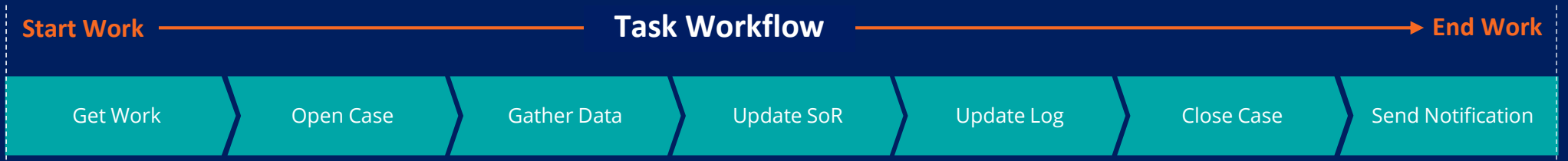
Finding the Most Effortless Path

Utilizing workflow details to identify complexity and friction



Example Workflow: Address Change Request

25+

Average number of applications used by an employee

- Friction
- Complexity
- Waste

~1100

Times per day that employees switch between applications

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Deploying Attended RPA Bots

- ✓ Reduce manual effort, decrease friction
- ✓ Simplify desktop clutter, swivel chair actions
- ✓ Better focus on interaction, fewer distractions
- ✓ Quick to deploy, easy to manage application
- ✓ Faster results at scale (20 - 20,000 bots)

Popular Use Cases

- Desktop initialization (Start My Day)
- Ready state, 'next work' applications
- Cut, Copy and Paste across applications
- Retrieve / update data from multiple systems
- Automatic notes, wrap-up summary
- Automated / simple search

Forrester TEI Study
Economic Impact Report on Pega RPA

- 5 typical
- Average
  unattended RPA bots
- ALL had tried
  efore

Fewer instances of rework due to errors saving $10.9 million

Delivered $42 million in total benefits for each 2000 employees automated

40 second reduction in AHT on 50 million calls per year

Created additional 280 FTEs' worth of capacity per year

Attended RPA – sample of the 100's of tasks can be automated

Screen Pop Applications: extend across multiple apps (demographics, CRM, Billing, etc.).
Upsell/Cross-sell: next best action on additional products
Changing Account Details: add new service, update address, add user, change names, etc.
Add New Account: streamline and automate collect data from other systems….credit, social,
Stop/start Service
Take Payments
Add Additional Features/Products
Close Accounts
Stop Payment
Reinstate Awards Points
Disputes
Password Resets
Data Extraction from Documents
Contextual default data and data verification
Compliance enforcement
Employee Verification

A real FS back office use case of Attended RPA at scale

Process	FTE Before	FTE Save	FTE After	Reduc…	…ys
BPAY Disputes	50	20	30		0
Audits	20	10			20
Fraud report	7				25
Fraud listing	70			29%	40
Equipment Finance			28	44%	80
197 & 199 Merchant unblocks			10	33%	20
EBS Account Opening		8	10	44%	30
EFT Disputes		5	5	50%	20
ATM Disputes	10	5	5	50%	20
International Ba… pening	60	40	20	67%	120
2 way SMS	3	2	1	67%	20

Work of 280 FTE's now done by 130 people
Agile delivery, Pega Robotics live in 12 weeks, complete in < 1 year
(total 475 man dev hours (2.5 people on project)
Now with 1000 Attended RPA bots

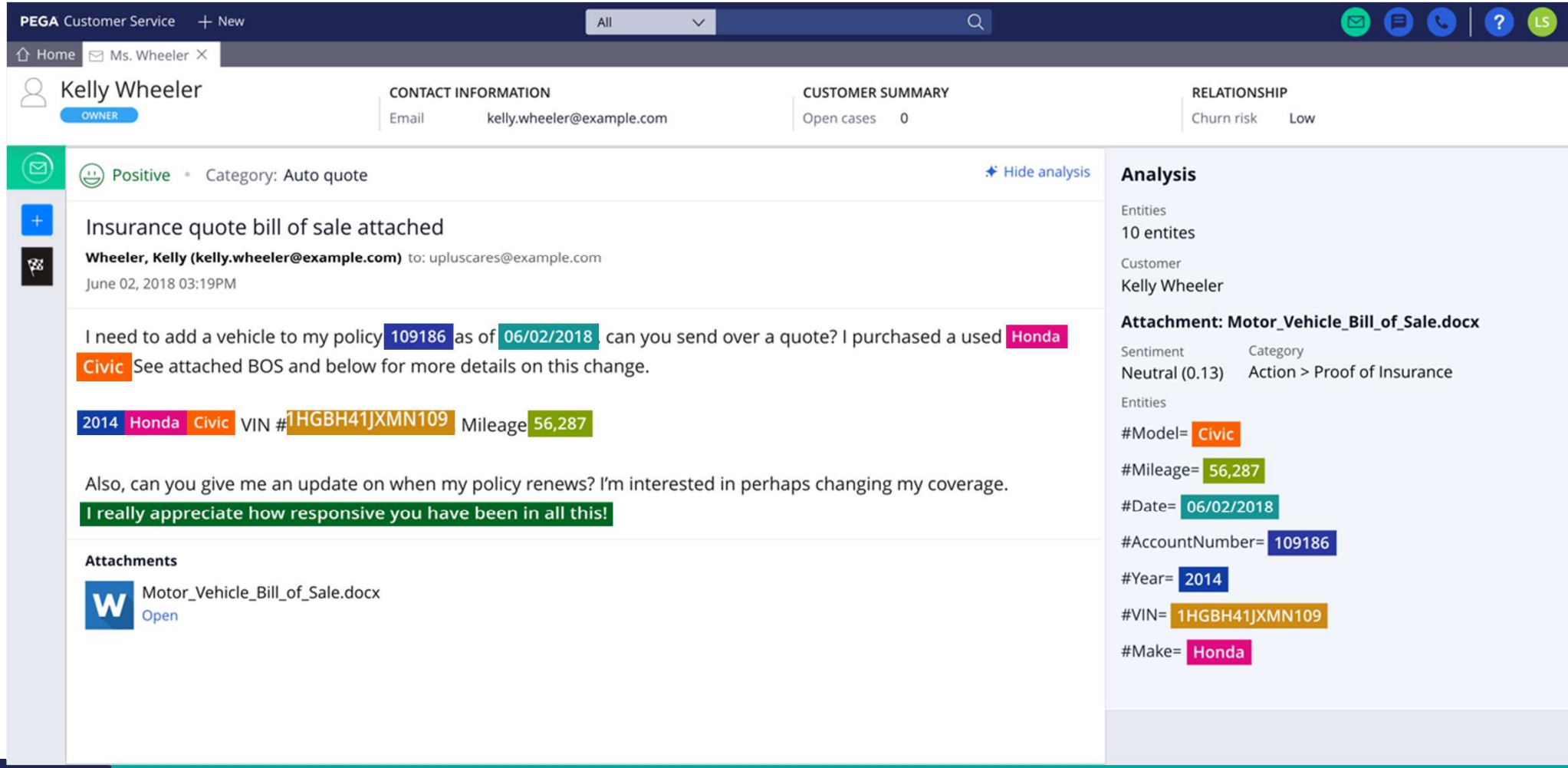
Impact of Attended RPA on process times

- implemented 30+ automations in 23 functions across Everyday Banking Services, Business Banking Services, Institutional Banking Services and Home Ownership Services. Savings in effort achieved have ranged from 35% to 98%, with an average saving of ~70%.

Function	# Automations	Volume Daily	Process Minutes (From->To)	Process Effort Saved
EBS - BPAY Traces	3	440	9 min to 4 min	56%
EBS – Audit Confirmations	2	250	2 min to 45 sec	61%
EBS – 004	1	900	4.3 min to 2.5 min	42%
EBS – 2 Way SMS	1	300	2 min to 6 sec	95%
EBS – Traces & Recalls	4	375	7 min to 4 min	41%
EBS – Card & PIN Refunds	1	60	19 min to 3 min	84%
EBS – NSW State Revenue Garnishees	4	1,100	7 min to 10 sec	98%
EBS – SA Fines Garnishees	3	750	7 min to 10 sec	98%
EBS – Personal Loan Applications	1	240	14 min to 4 min	71%
EBS – Ongoing Due Diligence	3	240	40 min to 33 min	35%
EBS –Card Fraud	3		1.5 min to 10 sec	90%
EBS – Online Account Opening	1		7 min to 1 min	84%

Function	# Automations	Volume Daily	Process Minutes (From->To)	Process Effort Saved
EBS – Estates Management	2	100	21 min to 10 min	52%
EBS – Threshold Transaction Reports	3	400	8 min to 4 min	50%
EBS-Employee Benefit Card	1	TBC	8 min to 30 sec	93%
EBS – Credit Card Balance Transfer	1	200	23 min to 5 min	78%
EBS – Data Control	2	280	1 min to 30 sec	50%
EBS – Corporate Cards	1	70	7 min to 30 sec	90%
BBS – WEF Deal Build	1	60	45 min to 22 min	50%
BBS – Doc Prep	1			TBC
BBS –Lending Support Deal Build	1	56	60 min to 30 min	50%
HOS – SGB	1	250	18 min to 1 min	94%
IBS – Account Opening	13	38	45 min to 10 min	77%

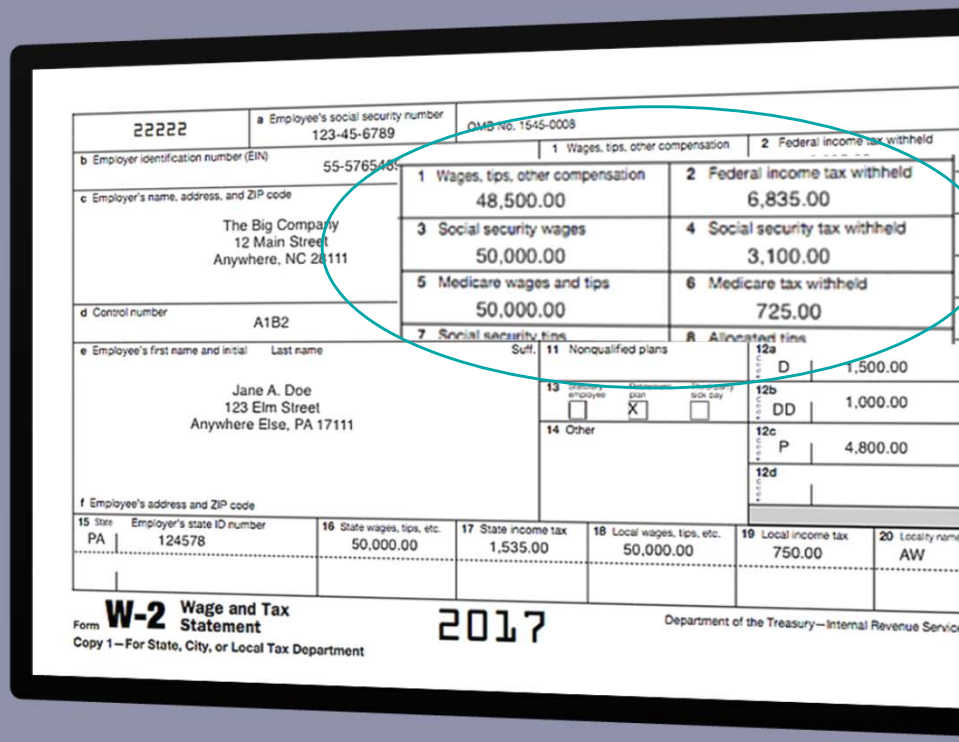
No code email automation - NLP (ML and AI)

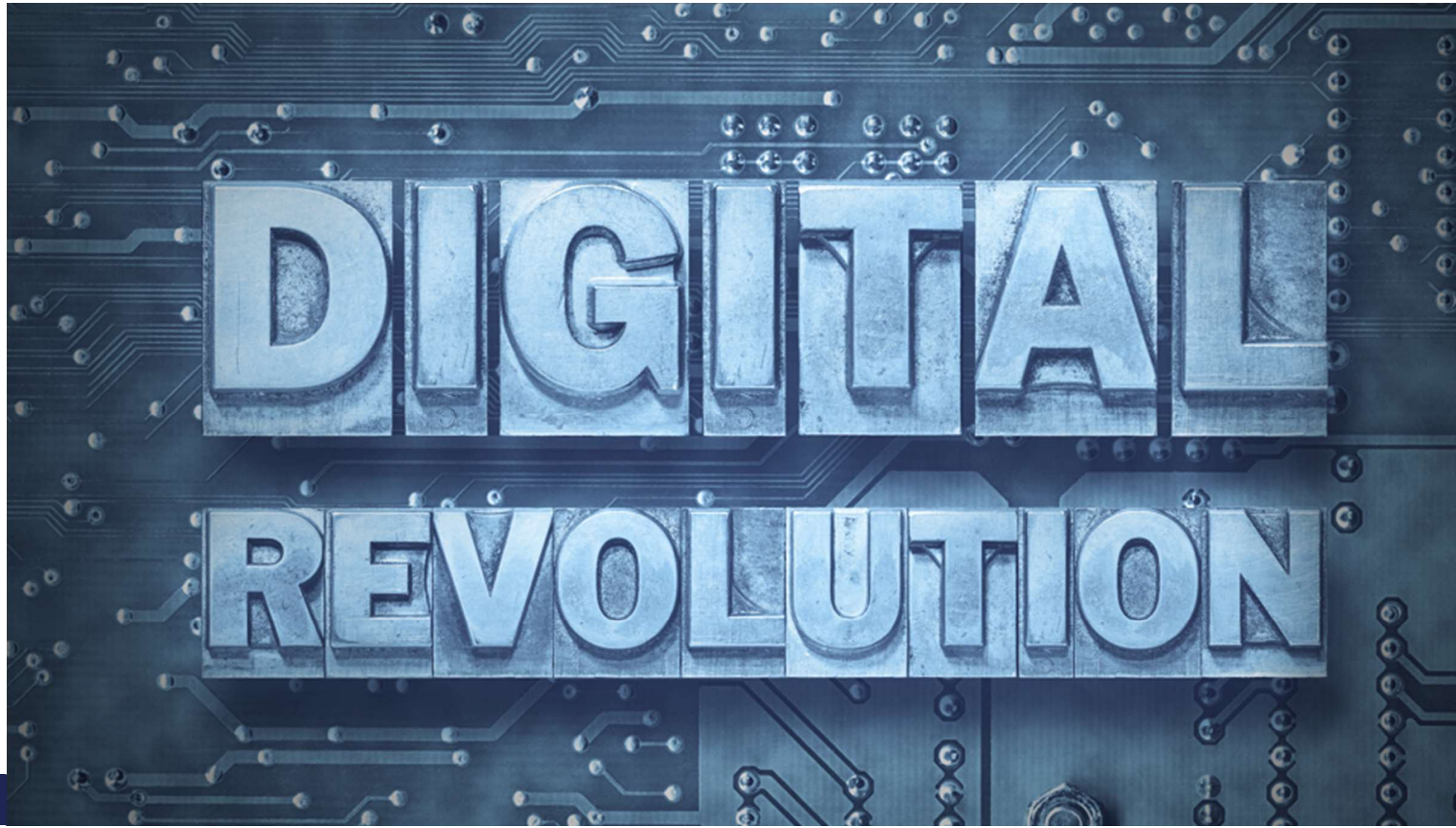


Automate data extraction from images

With **Document bots**

- Simplifies data extraction
- Pull data from documents to incorporate into automations
  - ABBYY OCR included in all Pega Intelligent Automation solutions
- Assists when working with object and table-heavy documents (e.g. tax forms and onboarding documentation)

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