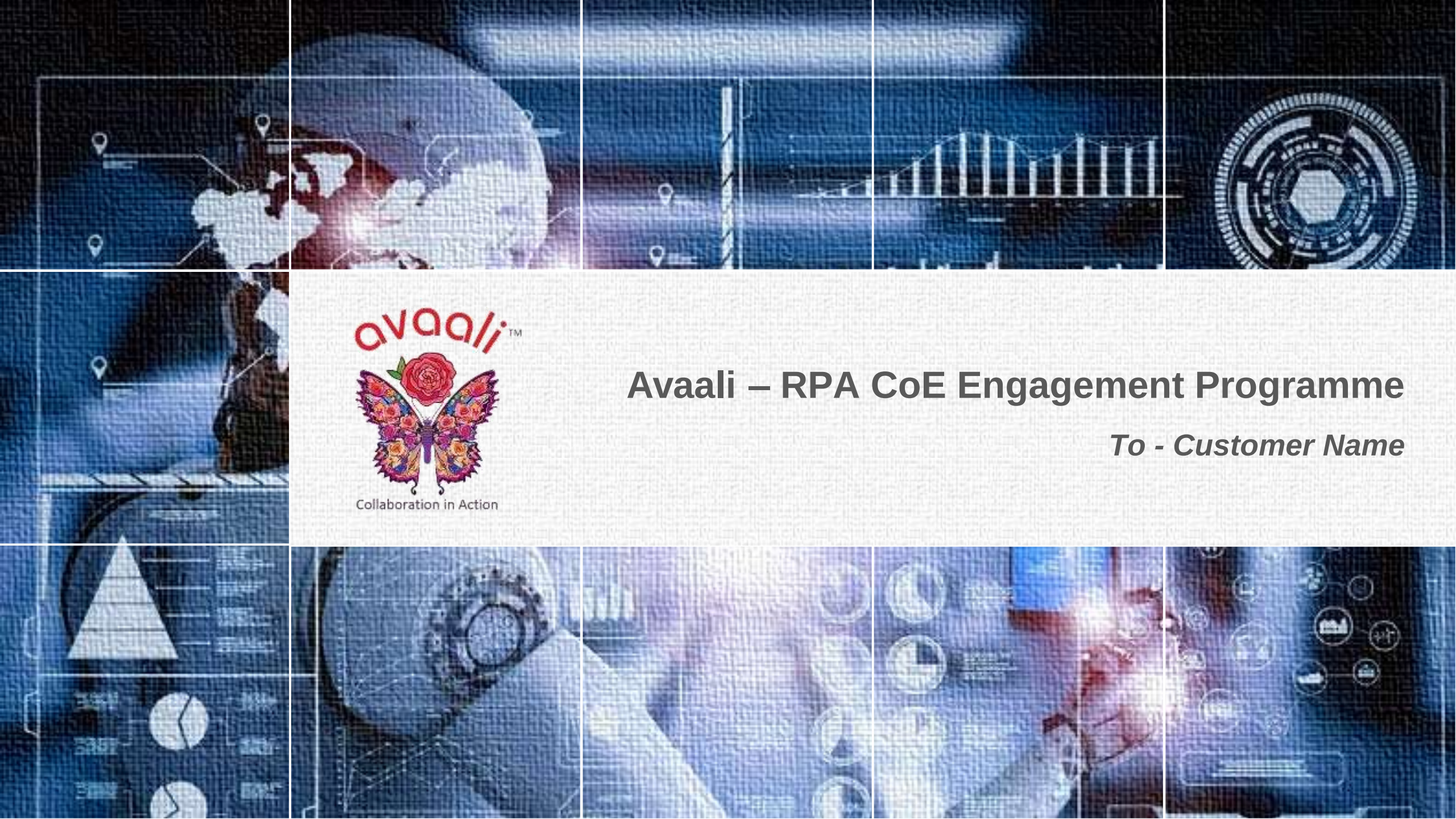


avaali™

Collaboration in Action

Avaali – RPA CoE Engagement Programme

To - Customer Name

Agenda

Background

- Setting Context and Background

Challenges

- Challenges in implementing RPA

CoE Model

- Setup RPA CoE

Methodology

- Citizen Developers Model

Benefits

- Benefits to Customers

Enterprise Business Challenges

Efficiency

- ✓ Slow and labor-intensive data entry processes and exception handling
- ✓ Less / no time for value added processes
- ✓ Error Prone
- ✓ Redundant and repetitive tasks

Visibility

- ✓ No analytics
- ✓ Lack of audit trail
- ✓ Lack of process data
- ✓ Difficulty to measure KPIs

Control

- ✓ Scattered process across multiple geographies
- ✓ Sensitive data exposed to undesirable persons
- ✓ Data security and cyber attack prone
- ✓ Vulnerability of end customer

.

Cost

- ✓ High cost of labor-intensive processes
- ✓ Higher scalability costs
- ✓ High change management cost

Drivers of Robotic Process Automation

High Volume

Value of automation increases for high volume and longer processes

Error Rate

Error prone processes will benefit more from automation

Process Type

Structured and standard processes allow quicker development time and ROI

Activity Type

Automation provides higher benefits where activities in the process include multiple copy and paste of information across systems

Customer Experience

Robots can work quicker and work 24*7 thus improving SLAs and Customer Satisfaction

Process Stability

Robots are best applied in a stable environment which doesn't incur frequent changes

Process Adherence

Robots will always perform the process as it is programmed to do, eliminating non-adherence

Quick ROI

Typically, RPA can drive about 30 – 50% of FTE savings and can be deployed quickly therefore business benefits start flowing within a short period of time.

Stages in the Automation Journey

INITIALISE

- Establish sponsorship and governance
- Select initial processes and baseline performance
- 1st sprint (the Pilot) – deliver initial processes
- Demonstrate the benefits
- Identify and prioritise further processes

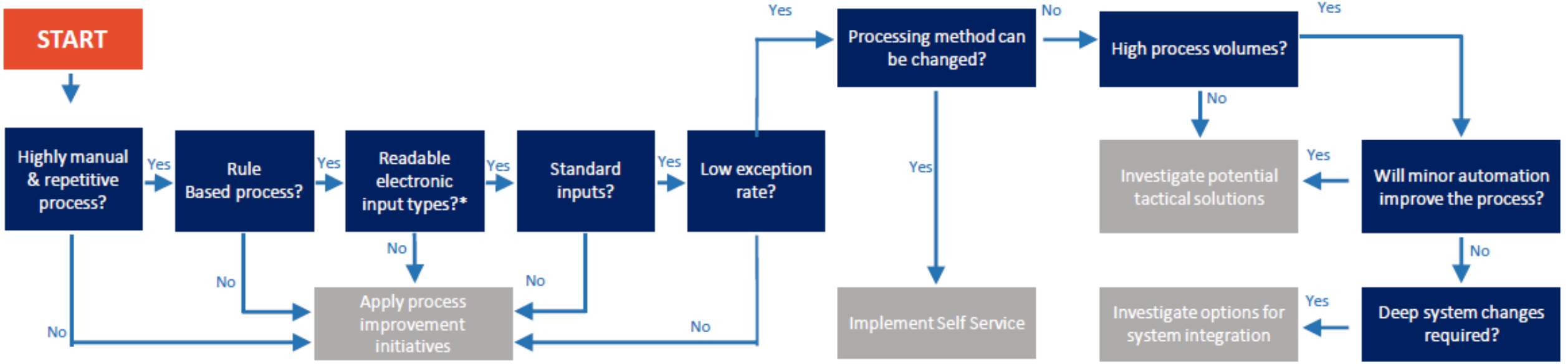
INDUSTRIALISE

- Implement RPA in sprints
- Make organisational changes
- Capture benefits and showcase successes
- Define vision and target operating model for automation, plan transformation journey
- Plan impact on people and organisation
- Baseline performance, build benefits case and set CSFs and KPIs
- Implement the required infrastructure, support model and core RPA team
- Establish demand pipeline

INSTITUTIONALISE

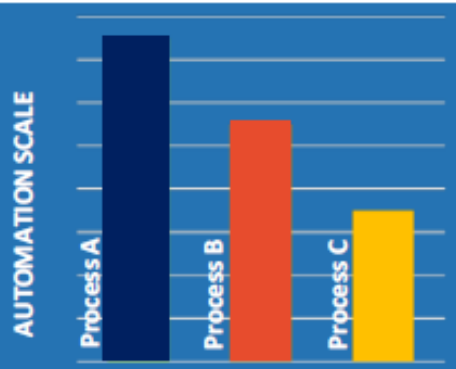
- Transformed, low-cost & high-performance operating model
- RPA scaled across the enterprise providing back-office and support functions
- Virtual workforce embedded at the heart of the organisation with optimal human / digital performance
- RPA built into future organisation design
- Culture of continuous improvement embedded within RPA function
- Automation skills developed and other teams trained
- Library of reusable objects established

Robotic Process Assessment



In order to benefit from a rapid ROI, choose processes that passed through a transformation initiative using the Lean Six Sigma methodology.

Process Characteristics	Process A	Process B	Process C
Highly Manual and Repetitive work			
Rule Based Processes			
Electronic Readable Input Types			
Standard Input Types			
Low Exceptions Rate			
High Volume Transactions			
System changes			



Process A is the best fit for automation, followed by Process B, while Process C should be subject to a Lean Six Sigma transformation approach prior to considering automating it.

RPA success criteria – Top 5

1.Senior leadership committed to the transformation – establishment of a proper governance committee

2.The most important decisions were made by the people who owned the business processes. They had the most appetite and interest in using RPA to create productivity efficiencies in their processes.

3. Identification of the right processes for automation, process optimization before automation

4. Reskill internally and change management

5. Effective COE set-up for scale and growth

Opportunity Areas for Automation

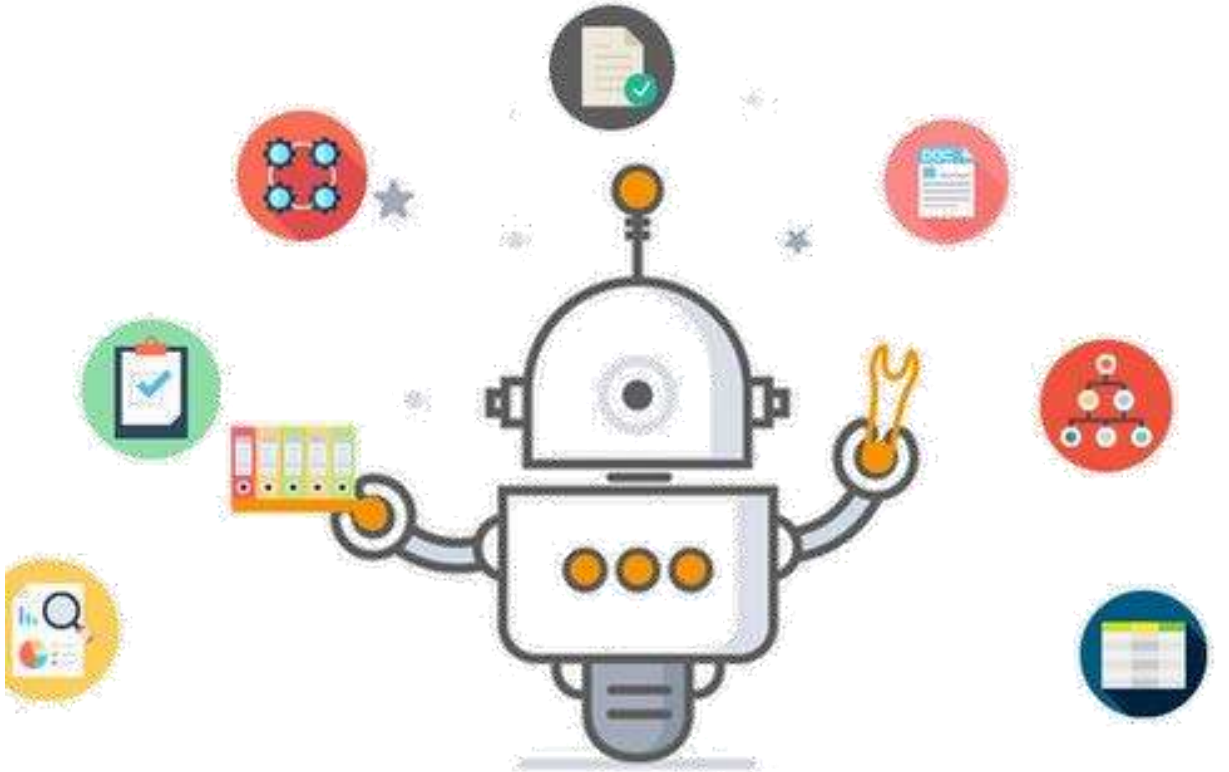
Customer Engagement
- Customer Onboarding
- Invoice Creation
- Contracts
- Customer Support and Communication

Manufacturing
- Order fulfilment
- Purchase order processing
- Bill of Materials
- Inventory reports

Supply Chain
- Contract Management
- Procurement
- Process Orders
- Logistics and Shipment Tracking

HR
- Workforce Administration
- Onboarding & Exit
- Payroll & Administration
- Leave Management

Finance and Accounting
- Invoice Processing
- Order Management
- Cash Application
- Bank Reconciliation



Automation in Customer Processes

Examples of Customer oriented processes in Manufacturing Industry

Customer Onboarding	Invoice Creation	Intelligent Marketing	Contracts
Refunds	Proactive Service Notification	Customer support and communication	Information Update
Assembly	Customer Profiling	Dispute Resolution	Product Design Development

- Assisted Sign on – Faster turn around with customer service
- Pricing flexibility with Intelligent Marketing & customer positioning
- Effective third-party solution integration
- Effective & personalized service
- Resource optimization
- Quick ROI & efficient Processes
- Agile processes supports achieving SLA

While it is hard to estimate the ROI for Customer services in a Manufacturing industry, companies have reported ~15%* of ROI within the first 2 months of implementation

Automation in Customer Processes

Examples of processes in Manufacturing Industry

Order fulfillment	Purchase order processing	Bill of materials	Inventory reports
Transportation management	Regulatory compliance	Customer support and communication	Prototype Testing
Assembly	Inspection	Research	

Opportunities for Automation — Low | Medium | High

- Improved Operational Efficiency
- High customization with Man – Machine Collaboration
- Reduced errors & wastage
- Reduced Labour costs
- Enhanced Regulatory compliance
- Super-efficient and Cost-Effective digital systems
- Digitized communication
- Predictive Maintenance

While it is hard to estimate the ROI for Customer services in a Manufacturing industry, companies have reported ~15%* of ROI within the first 2 months of implementation

RPA for Supply Chain : Planning and Sourcing

Plan

Perform Demand Planning

- Enterprise Forecasting
- Demand Sensing
- Customer Collaboration

Perform Integrated Business Planning (Sales & Operations Planning)

- New Product Development
- Conduct Financial Reconciliation
- Conduct Supply Balancing

Perform Inventory Planning

- Track Product Lots and Batches
- Plan and Manage Inventory
- Perform Inventory Control

Source

Perform Sourcing Strategy

- Define Sourcing Strategy by Commodity
- Conduct RFx/Auctions and Optimize Bid
- Analyze Supply and Assess Opportunity
- Contract Management
- Analyze Supply Market and Qualify Suppliers
- Select and Activate Supplier

Operational Procurement

- Create Requisition and Obtain Approval
- Transfer Product
- Create Purchase Order
- Assess Impact of Product
- Receive and Verify Product
- Authorize Supplier Payment

Perform Sourcing Strategy

- Segment Suppliers
- Measure and Drive Performance
- Conduct Supplier Reviews
- Terminate / Transition Suppliers
- Terminate / Transition Suppliers
- Track Continuous Improvement

Manage Contracts

- Create Contract
- Monitor and Enforce Contracts

Opportunities for Automation — Low | Medium | High

RPA for Supply Chain : Delivery

Process Orders

- Process Inquiry and Quote
- Release and Consolidate Orders
- Receive, Enter & Validate Order
- Generate Invoice and Collect Payment
- Check for Inventory Availability
- Process Complaints and Inquiries
- Reserve Inventory & Determine Delivery Date

Manage Transportation

- Build Loads
- Deliver Product to Customer
- Route Shipments
- Manage Import/Export and Customers
- Select, Rate and Schedule Shipments
- Logistics & Shipment Tracking
- Load Vehicle and Generate Shipping Docs
- Manage Freight Pay and Audit Process

Manage Warehousing

- Receive Product from Source (Supplier)
- Pick Product
- Pack and Label Shipment
- Manage Warehouse Operations

Process Returns

- Perform Returns Planning
- Execute Processing of Returns, Repairs and Recalls
- Manage Returns Policies and Procedures

Opportunities for Automation Low | Medium | High

RPA for HR Processes

Talents

HR Strategy
- Human Capital Strategy
- Strategic Workforce Planning
- HR Strategy

HR Steering
- Governance
- Organizational Design
- Metrics & Analytics

Talent
- Competency Framework
- Employer Branding

Talent Life-Cycle

Sourcing
- Talent Sourcing
- Recruiting
- Transfers
- Contingent Staffing

Deployment
- Workforce Planning
- Career Pathing
- Succession Planning
- Workforce Scheduling

Performance
- Competency Management
- Objective Setting
- Performance Management

HR Development
- Executive Development
- Learning
- Knowledge Management
- Performance Support

Rewards
- Compensation
- Benefits
- Pensions
- Recognition

Opportunities for Automation — Low | Medium | High

RPA for HR Processes

HR Operations & Support

Portal/ Knowledge Mgmt.

Documents Mgmt.

- Physical Records
- Document Management

HR Services & Administration

Employee Relations	Discipline & Grievance	Mobility Services	Leave Management
Absence Management	Health & Safety	Exit Management	Labor Relations

Payroll and Administration

Master Data Management	Compensation Admin.	Pension Administration
Organizational Design	Benefits Administration	HR Payroll

Opportunities for Automation — Low | Medium | High

Record to report (General accounting)

- General Ledger Accounting
- Consolidations
- Monthly/ Quarterly Close
- Financial Reconciliation
- Fixed Asset Accounting
- Tax Planning/ Accounting
- Benefits Admin./ Accounting
- Inquiry Handling
- Premium Accounting (Ins)
- Re-insurance Accounting (Ins)
- Investment Accounting/ Securities Pricing
- Daily P&L/ Mark to Market

Purchase to payment

- Requisition Materials
- Purchasing/ Procurement
- Payment Processing
- Accounts Payable
- T&E Accounting/ Reimbursement
- Procurement. Card Admin

Order to cash

- Order Entry
- Billing
- Cash Application
- Collections
- Bank Reconciliation
- Treasury/ Trust Management

Opportunities for Automation Low | Medium | High

Deep Dive in Finance & Accounting for Enterprise RPA

Accounting

- Automating complex journal entries
- Performing and documenting account reconciliations
- Calculating and applying allocations
- Maintaining fixed-asset accounts

Accounts payable

- Entering non-EDI invoices
- Performing 2-and/or 3-way invoice matches
- Processing expense-approval requests
- Completing audits (eg. Duplicate supplier payments)

Accounts receivable

- Generate and validating invoices
- Applying cash to outstanding balances Analyzing and processing disputes
- Creating reports (eg. Accounts receivable aging, credit holds

Financial planning and analysis

- Building standard management reports Consolidating and validating budget and forecast inputs
- Gathering and cleaning data for analysts

Payroll

- Flagging time-sheet errors and omissions
- Auditing reported hours against schedule
- Calculating deductions
- Harmonizing data across multiple time-keeping systems

Other

- Preparing external-reporting templates
- Conducting transaction audits of high-risk areas
- Preparing wire-transfer requests

RPA Scaling

Background

Organizations are looking to scale

66% of companies expect **an increase in RPA spend by at least 5%** over the next 12 months

40% of decision makers will **increase their RPA investements by more than 10%** over the next 12 months

Employees are ready to bring technology to their workspaces

74% of employees **are ready to reskill** to remain employable

2 days/ month time employees willing to **spend on training**

"The Future Of Work Is Still Being Written. But Who Is Holding The Pen?", Forrester 2020

PwC's 22nd Annual Global CEO Survey

Challenges in Implementing RPA

Process Analysis Issue

Hard to get operational leads to focus on the concept, and also believe in the concept

RPA Development

A design team is often missing in many of the organizations that are looking for RPA

Mismanagement of Responsibilities

It’s important to clearly outline who is managing what, what the RPA will handle

Lack of Help from a Local Team

Having a well-staffed and knowledgeable, local team on hand to help you with your RPA issues.

Business Case Issues

Processes that will be affected by the RPA should all be consulted as well, and all departments should be considered

Maintenance of Your RPA

If you’re not establishing a regularly scheduled maintenance protocol, you’ll find immediate issues with your RPA.

Infrastructure Issues

A centralized infrastructure team that is helping to expedite the implementation process..

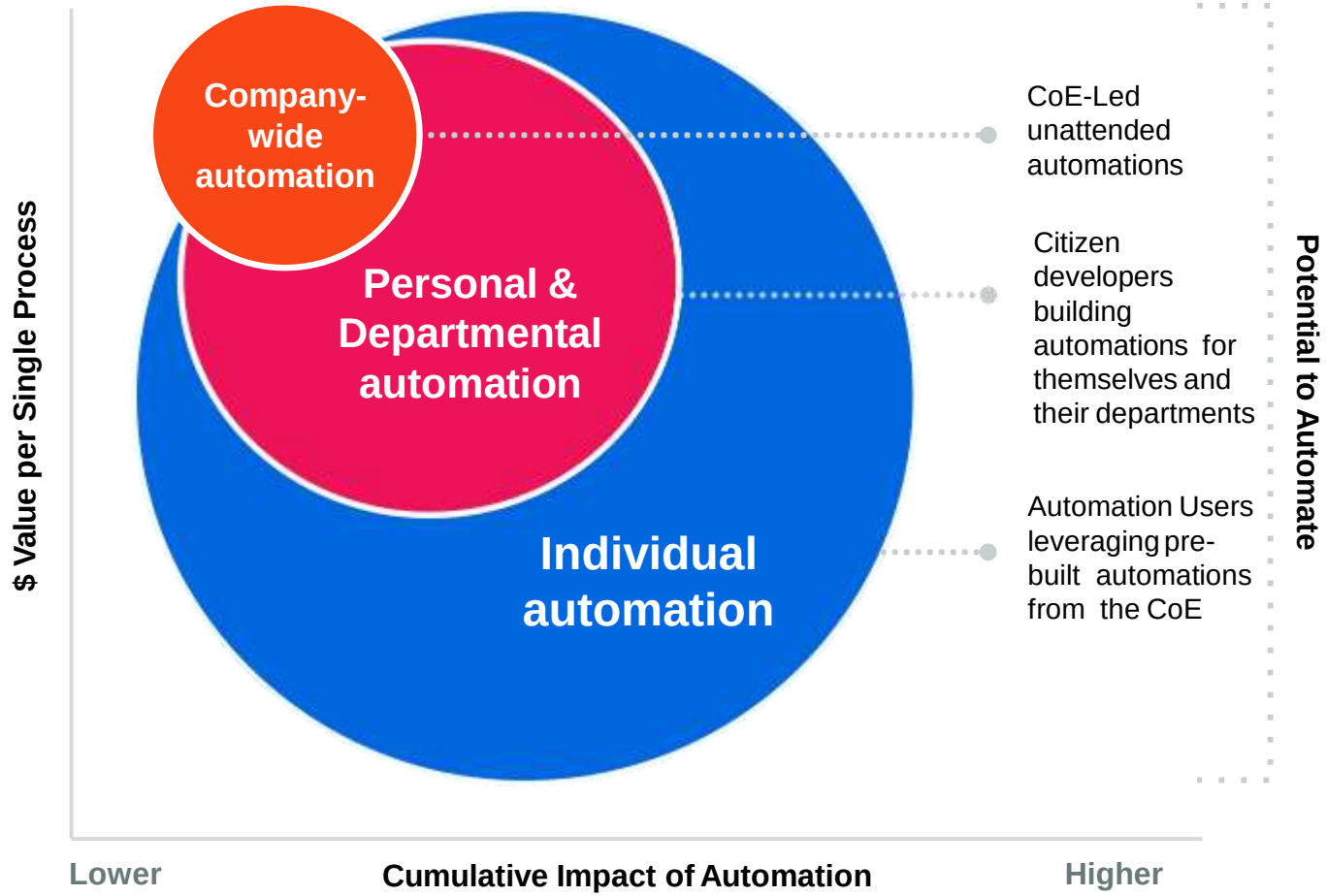
Post-Implementation Adoption

Leadership to guide employees to understand how RPA can benefit them, provide opportunities for entrepreneurship and make their lives easier overall.

Foster RPA adoption

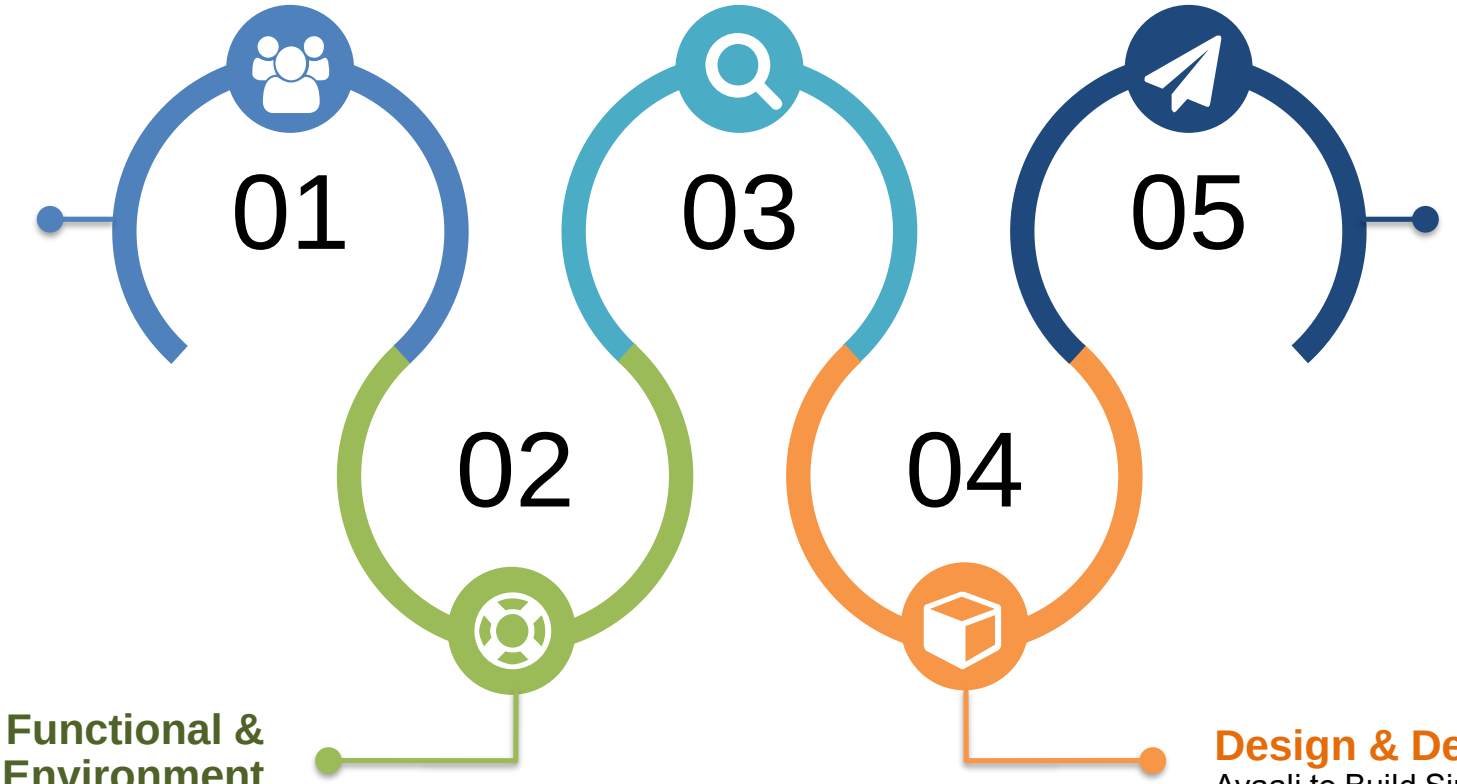
Your scaling opportunity with the help of individually-created automations to **drive bigger revenue and cost savings from RPA**

Gartner Predicts 2020:
By 2023, there will be a 30% increase in the use of RPA for front-office functions (sales and customer experience)



Build RPA COE

Setting up Digital CoE - Key Steps



Setup the Operating Team
Identify the core team
Define roles and responsibilities

Articulate a Governance Model
Assessing opportunities
Prioritizing automation activities

Enable CoE and Scale Up
CoE Team to develop new Bots
Avaali to Shadow resources

Create a Functional & Technical Environment
Identifying the right tools
Conduct trainings

Design & Develop
Avaali to Build Simple Bot's
Shadowing the development activities

Enable automation enterprise-wide

Identify the Workforce for Automation – Step 1

Enable everyone in your organization to build and use automations with the right tools for them

At the core of your CoE lies the **Robotic Operating Team.** This team consists of a set of clearly defined roles and responsibilities and is charged with implementing and managing the automation as quickly, as efficiently and as safely as possible throughout the enterprise

CoE Lead

Manages RPA adoption to enable employees across the organization benefit from automation

RPA developers

Create process automations for group usage as a part of centrally-managed RPA program

Citizen Developers

Non-technical employees who create their own automations for specific processes

Automation Users

Automation consumers who actively work side-by-side with robots

Create a Technical and Functional Environment – Step 2

While the roles and responsibilities are being established, you must focus at the same time on the functional resources & technical tools, clarifying and configuring them in support of the implementation.

Identify the right tools for your workforce:

CoE Lead — **Automation Hub**

- Gather ideas from employees
- Scale up with the power of crowdsourcing
- Manage the entire automation lifecycle in one place

Process Owners — **Process Mining**

Produce a detailed “x-ray" of your end-to-end processes by pulling log data from your enterprise systems

Process Owners — **Task Mining**

- Automatically identifies and aggregates process workflows
- Applies AI to map tasks to automation opportunities.

Business Users — **Task Capture**

- Takes screenshots and gather data for each step
- Document workflows with ease
- Creates PDD and XAML file

Citizen Developers — **StudioX**

- Build your own automations for everyday tasks
- A no-code tool to build automations
- Deploy robots locally on your desktop

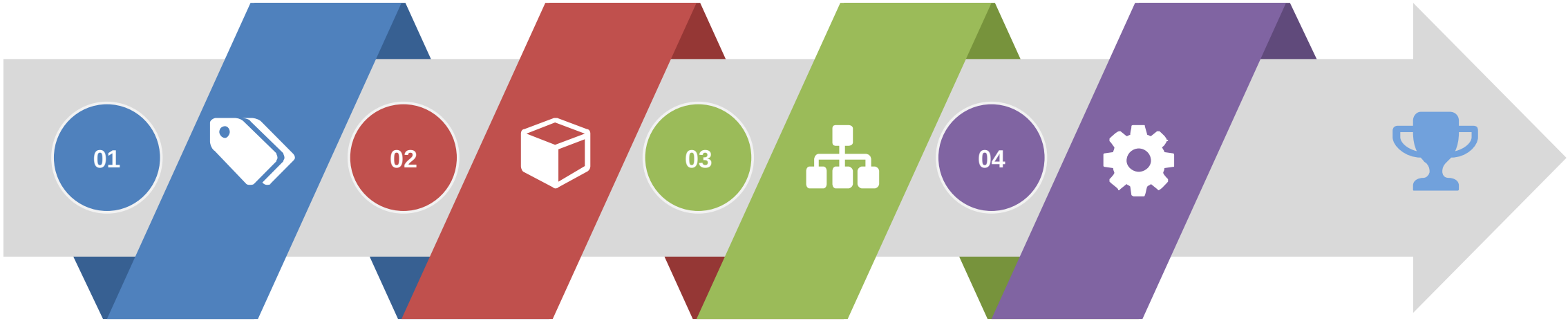
RPA Developers — **Studio**

- Everyone from business users to advanced developers can build great software robots
- Design automations fast with an easy drag-and-drop editor

Create a Technical and Functional Environment – Step 2

Training for your workforce:

AVAALI's CoE Engagement Programme – Starts with **2 – 3 weeks** training – We help you to learn and understand how to use RPA tools to build and own a simple **RPA BOT**



Introduction

Team Introduction

Understanding participant expectation

RPA Overview

Functionalities

Tools and Technics

Process Assessment

Capture process details

Overview of Process Design Document

Deep Dive

Automation Design

Create first BOT

Bot lifecycle management

Publish

Bot Administration

Maintenance and Governance

Final Assignment

Articulate a Governance Model – Step 3

Creating a good governance process is highly important and goes a long way. The sooner in the automation journey it gets set up, the better.

Assessing RPA opportunities and prioritizing automation activities

Provide the guidelines and templates for assessment, design, development and deployment of robots, managing the demand pipeline

Change management issues & risks are laid out and frameworks & templates for change management are established

Performance and productivity metrics & measurement are also circulated

Assigning roles & accountability and ensures good collaboration and communication between units

Pilot Program – Step 4

- Validate processes identified for Automation by COE team using Automation Hub
- Verify process flow documents generated using Task Capture
- Start with the top 10-20% of target users
- Shortlist low hanging process with simple complexity
- Avaali to build BOTs with Customer team shadowing

Support - Step-5

CoE team to develop new BOTs with Avaali shadowing

Post-mortem with users

- What did they build?
- What processes do they think should be automated first?

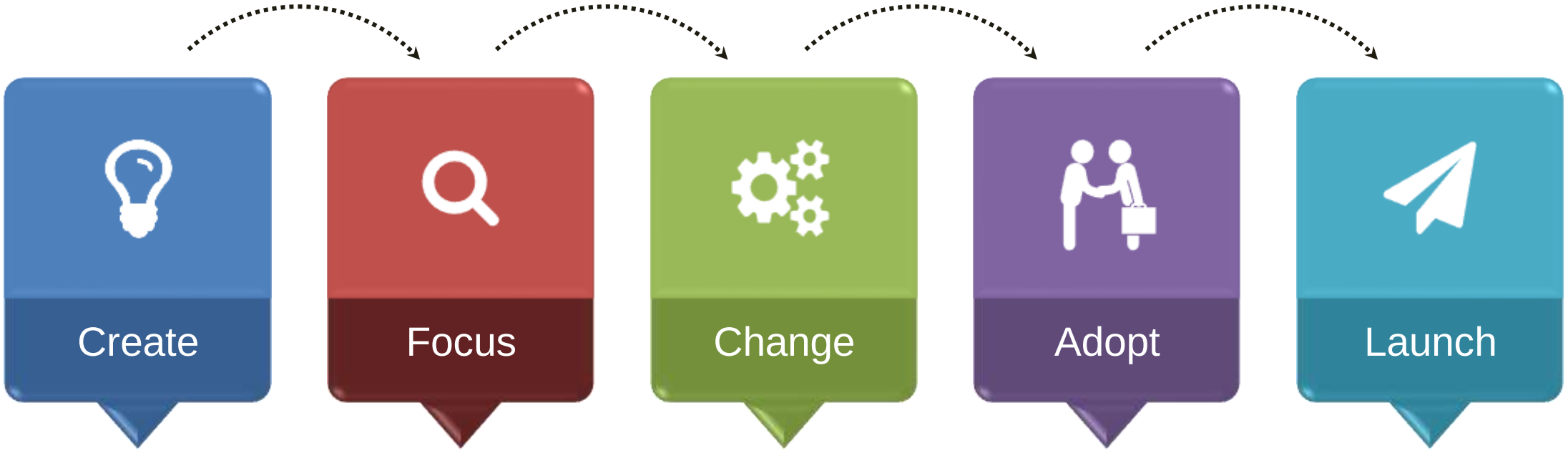
Conduct a quality check and make BOT ready for Production

Guide business users on how to consume the BOTs

“Show and tell” with the broader org to showcase what they built

Support to scale-up and create more BOTs

Benefits of CoE



Ability to create and re-use best practices and proven methodologies

Ability to focus effort and resources

Ability to control change management and governance

Ability to increase partner management and adoption

Ability to have a centralized team to help scale bots – industrialize RPA to deliver faster results

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Collaboration in Action

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