(3) Imagine Austin | Scaling with Solution Pattern Modeling -

Transcript:

(00:06) cool we got a full house so let's go ahead and get started let's do it safe harbor statement you've seen this a couple times already so we're going to skip it uh this session is all about scaling your automation impact through the use of solution patterns if you've been following the thread of some of the sessions that Mark and I have done uh we're all about this Pathfinder program right and as a part of the Pathfinder program we've identified those five PS the five pillars of an automation program that

(00:33) scales how many people know them already we have prizes Let's see we don't know what are they you did raise your hand people's one what else production excuse me sorry production is one pro promotion and engagement is another one very good hypine is another one yep what are we missing program that's important program is important uh so this session is specifically around what you're doing with your production of automations and this is that P and we're going to talk about some ways that you can mature your

(01:07) automation development and think about the ways that you maybe take on more complex use cases as you continue to grow your automation program as a very quick intro my name is Micah Smith uh I lead our community and learning I used to lead a automation program at Tia which is a large Financial Services organization based out of Charlotte North Carolina and I still live there but but uh that was a really flowery way of saying Charlotte Mark why don't you introduce yourself real quick my is Mark G I've been with automation anywhere

(01:37) just under five years so I started in Professional Services and now I'm leading our internal Center of Excellence awesome so what we want to talk about today uh is really how you can put all of this stuff together right this is our system of work uh kind I think they call this a architecture which is like architecture plus marketing but how do we bring a lot of these things together right a lot of us have been creating a automations that are essentially scheduled tasks we say hey wake up at 1:00 a.m. and run this

(02:05) bot or scan this directory every 15 minutes and try to bring in a file and that's the extent of the types of automations that we create right and we want to look at how we can start to create different types of automations that really unlock and enable a lot of these productivity benefits that we've been hearing about over the last couple days so as we jump into this we're going to talk about the solution pattern story I may be going kind of quickly because we do have a lot of slides to get through including a couple uh video

(02:31) demos we're going to talk about the solution pattern story we're going to talk a bit about this framework we will also point you to some resources on our website where you can get some of this detail and uh see some of these in a little bit more High depth we'll also talk about the benefits and who is benefiting through this we'll talk about finding your own path to implementation we'll have a conclusion and we're going to walk through some of these solution patterns and we want to hear from you

(02:55) are is this something you're implementing already or is this something that you might want to do a POC on so Mark uh I think really the Genesis of this really came from you and and some of what you've been doing on Professional Services and you and I have had a lot of conversations on this over the last couple years so for sure give a little bit of background of what this is and where this came from sure so um I think this first bullet point captures the essence of it um in Professional Services we were working with with many

(03:20) of you many different customers and and there's some Expressions that get floated around a lot you hear things like the the art of the possible um and and those are good Expressions I think every can can rally behind those kind of things but the question comes in yeah but how do I actually do it what does that actually mean in terms of using the software to achieve a certain a certain uh benefit or an outcome um so we saw a need pretty quickly with all the diversity of use cases I mean some of you if we were to look at the use cases

(03:47) you've already implemented you see many different types of complexity and using different different uh parts of the product um but what what we wanted to do is come up with a simpler language for how we can describe how an automation is actually going to work um this second point is really really relevant if you you listen to the Keynotes hopefully everyone uh caught those you can see that automation is definitely trending towards the user experience side of the house right if we were to look at you know traditional RPA

(04:13) or the kind of automations many of us were familiar with even just a few years ago there wasn't so much of a user experience side of it right as as Micah said like hid it's hidden it's a scheduled task 100% it was something happened at 3:00 a.m. last night and now I have a spreadsheet that that kind of thing right you look at what's happening with co-pilot all of a sudden now our business user actually interacting with the Automation and that opens a whole new sphere of possibilities and also

(04:35) some challenges um so so how do we simplify this core question for the stakeholders uh how will the automation success uh success platform actually enable my use case we're going to talk about that in a second but U and I'm sure many of you are already aware of this but when you're delivering a use case you don't have one or two stakeholders you got a number of different stakeholders right if you think about how the platform is going to enable your use case we've got somebody that's hopefully going to receive some

(04:59) benefit from it what we we call in Pathfinder the impact yes but the but the consumer of the automation right the yes so so who's going to consume we we've got somebody that's going to build it uh but that's not enough then we've got a control room aspect of it and Technical architecture so we've got these different rules and responsibilities it really does take a little kind of mini team when we're delivering automation what what I think you'll see is that when we answer this

(05:22) solution pattern question it it answers questions for kind of everyone that's involved in it in terms of understanding how it's going to work so let's start to break this up and I'm going to put some of these objects on screen so we can start to think through this so if we think about what a solution pattern is what we're trying to do here is have consistent language and thought patterns to the types of automations that we're creating we're almost like classifying these because we

(05:50) want to understand how does it execute where does it run how was it invoked those kind of questions enable us to start to create categorizations for our automations so the first question we have listed on here is how does it start talk me through some of the ways that automations can be invoked yeah so so if we're talking about trigger based automations you know we got automations that happen when an email arrives we've got automations that happen when you move a file around we talked about scheduling we got automations that run

(06:15) based on a date or time schedule uh we've got automations that happen on demand you know when I press this button including embedded which we'll get into so I invoke it kind of manually on demand uh workload management uh apis is a good one right some external systems can even call an API and invoke a bot so those are all basically ways of invoking an automation the next point is how does it execute and this is really about where it's running yes and and this one uh you'll see uh I'm I don't directly work

(06:45) for the product team but you're going to see this one evolving uh in in some interesting ways so when we talk about how does it execute or another way of putting that would be where does it execute we're talking about is it right in front of me so is it on the machine that I'm logged into right now is it happening over there on some remote Runner uh or device pool um and desktop Automation and process automation when we talk about co-pilot we've got a differentiation there between desktop Automation and process automation um so

(07:10) that's all about where does the the action actually happen where does the automation run API tasks is another really interesting one that's been introduced a lot this week yes um and API tax where does that execute right it's in some some container someplace so there's a really interesting uh dichotomy there and then finally what's the user experience talk to me about this one right so this is another one that again 10 years ago maybe this wouldn't have been a good question but it is now uh what's the actual

(07:32) experience so you'll see some of these ones with co-pilot for example it can be embedded directly in my application and what application well we can talk about that but there's different options even for where it can actually sit because ultimately hopefully everyone's got that message about co-pilot we're basically bringing the automation to you or to the business user uh that wants to invoke it uh so we've got those options we've got these ones that are in the background we still support those we're going to be

(07:56) doing a demo in another session later on it uses heavily use a lot of heavy use of generative AI uh but it's one of these background ones it runs on a schedule that made sense but it's still using generative Ai and then things like workload management uh for those of you that are using wlm very cool so those three components together how does it start how does it execute and what's the experience really are what we use to define these different solution patterns that we're going to talk about there's

(08:20) been a lot of teasing of what these are we're going to get to them here in just a second so talk to me about the solution pattern decision and how I come to a point of deciding what solution pattern this is and what that means for me right so so so what we're talking about here is is you know if we if we talk from a for from the standpoint of benefits you know why do we even care about having a framework like this um I think unlocking Innovation is a big one um many of you might be able to relate to this you get stuck in a certain

(08:48) pattern like you look at any business requirement and immediately think what's the schedule I don't know how how many have been there you don't have to raise your hand but we've all been there where you where you find yourself stuck in that um so unlocking Innovation what if if every time somebody brought a requirement to you this is what goes on in my brain when somebody brings a requirement I'm now thinking about the different solution patterns I don't always go to my favorite one I I now

(09:08) have a better idea of really what the what the universe looks like in terms of different possibilities consistency in language So within our automation program with uh within automation anywhere you can imagine what's one of the key questions anytime someone brings a requirement we immediately start tossing this around what what pattern are you thinking you you can compare and contrast what we could embed it into a Salesforce uh but there's also potential for it to run on a schedule and how are we going to handle exceptions so it's

(09:31) changed the way that we talk about the use case um and then uh ultimately streamlining things like uh development maturing automation holistically what that means is that if we understand all the different solution patterns that are available back to the Pathfinder concept we can we can go go from start into even more compelling high impact experiences with accelerate and on to scale basically by evolving the the type and the the the set of solution patterns that we're using yep I like that a lot and I think this maturing autom holistic

(10:00) maturing automation holistically is a really important point right because a lot of automation programs will start with the lwh hanging fruit yes they'll do that through scheduled task based automations and then they kind of get stuck in that dichotomy of saying everything has to be a scheduled task so I have to think of everything in the lens of what time can it run how can I invoke it things like that yes we really want to mature to a point beyond that so you can start to take on different types of use cases and New Opportunities and

(10:27) and be so we're going to dive more into this bit on the in a moment but these are some examples of the different kind of stakeholders involved in that decision we'll give you an example so let's jump into this I'm going to start to bring some of these up let's talk about each of these roles and the kind of question we're asking and answering here right so so first of all these these don't map you know directly necessarily to to people or individuals that are involved in the Automation in

(10:48) your organization there might be different people wearing different hats but if we think about it we make a solution pattern decision we've got somebody probably in your organization that's doing the intake analysis like who's the person that's actually understanding uh from the business bus or from those consumers what the automation needs to do that's a stakeholder of the decision uh the technical architect so regardless of what you call this individual somebody needs to be thinking about do we have

(11:09) enough capacity do we have enough Runners set up do we need more are we going to use a device pool or individual devices are there performance requirements we need to consider so there's a technical architecture piece who is administering the control room um if you if once we understand these different patterns you'll see that things like the users and roles and Licensing all also depends on the solution pattern we choose for sure the consumer so basically who's ever consuming or getting the benefit from the automation

(11:34) they're certainly interested in what the solution pattern is that we Cho yeah how do we interact with it absolutely uh who's going to be testing it if you tell me the pattern involves workload management I'm going to run different tests than if it's going to be embedded in Salesforce for example or if it's going to be a schedule automation right and finally last obviously but not least who's actually going to build the thing they certainly want to know what the solution pattern is because there's

(11:54) design and development implications to what what whatever uh pattern you choose all right so that was a lot of teas for all these solution patterns this is a slide that has all of them on here now we're not going to go through every single one of these but what we want to talk about here is that these are all the different types of automations that you can be creating using the automation success platform you'll see some of these that probably look pretty familiar and appear to be pretty obvious just bed

(12:19) on their naming right on the far left hand side here uh run remote via schedule how many people are creating automations that run on schedules right now everyone right I mean that's what we all start with because that's the easiest one it makes the most sense but there's also opportunities to run remote on Demand right there are use cases for when that actually does make sense run remote via API conversational run remote via API let's talk from the top down real quick I'm not going to go through

(12:45) all of them but let's talk about the two top categorizations right we think about no human input which seems like it would conflict here but we're going to we're going to clarify that and then we also have human in the loop so with no human input we've got three blue blocks there talk me through those and and why we created those the way that we did sure so I think I think the first thing is that the left side is probably most of our comfort zone in fact the first two are probably most of our comfort zone I

(13:10) think some of us have have not experimented too much with with workload management but most of the I'd say the traditional automations that we're familiar with probably live in those those first two um with workload management there are some really really interesting patterns and one thing I want to say here is uh even in my time in Professional Services in my time with with you know running this program within automation anywhere I haven't implemented all these patterns that's actually not the point the point is more

(13:35) that they're possible and and and they've got their place right there are certain situations where you could use them um so I think I think broadly speaking the left hand side is the stuff that doesn't relate to co-pilot it's basically basically the idea is you've got what you need to invoke it I mean if if you're going to invoke something at 3:00 a.m.

(13:53) when hopefully most of us are sleeping uh it can't rely on a lot of you know manual entry from a human so that's the stuff on the left hand side and before we jump over let's clarify the attended plus no human input talk to me about the decision there sure so so we put a lot of thought into this and and if you think about things like unattended and attended that pretty much models the way that we we license uh right so so if you think about when do I need an attended license so for example business user is going to run something

(14:17) on their local machine that would be an attended Runner license whereas unattended uh where it's running remotely that would be an unattended license it pretty much uh lines up with that okay all right so let's jump over to the right hand side here and now we're introducing human in the loop which for the most part is is co-pilot yes talk to me about some of these blue boxes blue boxes here yes so so desktop Automation and process automation these areas you know if you saw everything that's coming with the uh in the

(14:42) Keynotes you'll see that these are major major advancements that are happening um one of the reasons that you'll see on the right hand side this is kind of cool you you won't see language like is it running locally or remote on the rightand side if you look carefully on the on the left hand side there's things like run remote meaning it's running on some Runner that I'm not logged into into right now run local means it's running right in front of me you won't see that language on the right hand side

(15:03) the reason is because we're bringing more and more flexibility to that it's kind of co uh cool so if those of you that have experimented with what we used to call Airy processes or co-pilot processes they're coming to you locally soon you'll be able to run them on a local machine which is going to unlock some possibilities currently that would be all remote right with co-pilot uh all that executes on a remote pool um so we actually sat down with the product team to make sure that this thing um isn't

(15:28) going to need a Vision next week this actually represents something that's kind of future proof for everything that we can see on the produ product uh road map right now so desktop automation uh generally speaking this is the kind of stuff that's that's uh a combination of task Bots and forms process automation we're using that composer in our product to actually orchestrate a process great yeah so this feels very overwhelming yes there seems like a lot of this right so within the Pathfinder program what we

(15:57) talk about is there's this concept of start start accelerate and scale yes and that represents where your program is from a maturity standpoint in these key areas so if you're just getting started let's talk about some of the key yes solution patterns that you need to be focusing on absolutely the first one is all of our favorites run remote via schedule right this is what we're already doing this is the bread and butter of many of your automation programs this is the one we're most familiar with for each of these solution

(16:22) patterns we want to talk about how is it initiated where is it executed and how can it be used and with how can it be used we're going to talk about some examples or some use cases where this would apply so break this one down for us real quick yeah so run remote via schedule if you look at the the words of that first of all it's running remotely it's not running right in front of me it's definitely on some remote Runner or some Remote device pool um and Via schedule we all know know that piece of

(16:46) it in the control room is where we're going to maintain that that schedule so that's how the the actual execution is going to happen um in terms of usage anytime we've got those situations where I need the output consistently and based on a certain date and time schedule um we got tons of examples within our own organization in fact one of the demos we're going to show a short demo is going to do that with generative AI which is important even these kind of old patterns that we're all used to even

(17:10) in the new ecosystem with all this co-pilot and stuff this stuff will still have its place right things that need to run on a certain date or time schedule y absolutely so we'll skip over that one because everyone knows that really well the next is run remote on demand yeah so run remote on demand it's not based on a schedule this is an example where I'm going to go into the control room for example and I'm going to invoke it whenever I want to right so so if you think about ad hoc requests welcome to

(17:33) run remote on demand we use this a lot we did a major implementation of a new Finance system some of you that have probably used automation to help you with things like migrations and data transformation uh implementing a new system this is probably what you used we use this extensively for that yeah and so this is a stuff that's kind of infrequent but automated right so maybe I need to run it quarterly I run it at the end of every week but I have to wait till the workload is done or something like that uh these are run on demand yes

(17:57) okay the next one again we're just talking about start phase right now so these are the three that we would say hey get warmed up with these know how to build these and have some familiarity here so so run local on demand it's also got its place uh in the world run local on demand this gets used a lot in places like call centers so I want to run the automation on the machine I'm logged into right now so one of the key things here is you can use your existing infrastructure well that's important

(18:22) right so if you've got a a staff a large number of people they've all got laptops or their own machines no need to invest in a bunch of separate VMS because all the action happens on the the local device so we have lots of these situations with call centers including with functionality that we have that's piter and piture I don't know how many of you have actually used that but it's running locally but you can run it in its own separate window so that it's not interrupting the work that you're doing

(18:46) you can continue to operate the machine the the automation is just running in a little window that's run local on demand and that uses some of the virtualization capabilities of Microsoft's desktop yes all right so as you start to think through getting to the accelerate phase right we've gotten through the bread and butter typical automations that we've all created we want to start to think about run remote through API and this is where we start to think about more fully integrated digital Solutions yes maybe I

(19:11) have a workflow or a case management platform and there are certain steps within that workflow or certain steps within that case management platform that I want to automate but I may not be able to automate them in that platform and so this is where I would invoke automation anywhere to actually execute that automation the thing about this is I do have the ability to send that task to a Remote device or device pool and I can actually send input data to the Automation and get output data coming back out so if there are certain values

(19:40) I need to pass to the automation the case ID the identifier of the individual whatever it might be anything that I Define as an input variable for that particular automation is fair game for me to map data to so that I can use that within my automation execution how are you guys using this at automation anywhere yes so so we've got a we are actually spending a lot of time with this pattern right now um and it's with a slight variant of it you'll see in the in the solution pattern modeling framework you'll see it's run remote

(20:07) through API conversational um so we've integrated uh a lot of automations with a chatbot platform that's something that we're doing right now we want to Pro provide an experience that's kind of a self-help for things like it requests we've got a chatbot platform uh sometimes the user uh just needs an answer we can use things like generative AI sometimes what they're asking for needs an automation to run so I'm going to show you a demo of the the Run remote through API version that's

(20:33) conversational right because that's that's a little bit different because basically we've got we've got users invoking it from a chatbot platform depending on what they're asking I'm going to run a different API run a different bot through API and before we run the demo just pause for two seconds let me just give one quick caveat the the objective of showing these demos is not so much to dive into exactly what the use case is uh actually I'm I'm doing a session at 3:15 we're show showing some of these in

(20:58) detail we're going to talk about what the business problem was and everything the objective here is just to to show you how the solution pattern looks or how how it works hope hopefully that's clear so I've got a little demo here of the conversational one so what this was was we wanted to give the ability uh to our our employees to quickly book a meeting so uh I need a half hour of Micah's time that actually uh comes up sometimes so we can go onto a chatbot platform this is a third party chatbot uh program it's going to ask for

(21:28) a few inputs uh who do you want to meet with I want to meet with Micah um you need to you can provide a subject for it it actually provides a generative AI generated uh meeting agenda based on what you want to talk about but the important thing is how does it know when Mike is available first of all and then once I've got an appropriate time slot actually booking the meeting that's all bots so so you'll see it here would you like to have an agenda included it's asking all of these questions time

(21:54) availability and actually booking the meeting that's API API calls to uh automations so those are kind of cool uh possibilities we call that one meeting meet all right the next one is a very first off how many people are doing run remote via API right now integrating API so look around the room right significantly fewer people have gone to the point of starting to create Integrations with their automation platform and other applications so this is a great first step to mature into start to look for some of those examples

(22:24) of where you can start to create those Integrations we have videos on how to use the control room API to invoke automations they're very simple we've got Postman collections that are available so you can just test that out the guy who did the video incredibly handsome charming so yeah go on our YouTube always on yeah yeah not always on time go to our YouTube we have videos on that if you have questions you can reach out to us but there are videos on how to set that up and how to use that to invoke an automation all right the

(22:50) next one we want to talk about is run remote via API using wlm so this is another flavor of a similar invocation absolutely so so workload management for those of you that are not aware workload management is when uh we want to distribute our workload we've got a big workload we want to distribute it across a number of devices for example we got service level requirements your requests need to be completed within X hours got a high volume I've got a pool of devices and I just wanted to distribute that

(23:13) workload across those uh devices so so I've worked with customers on things like this um with just one piece of the process has got 80 bot Runners processing transactions so and and we have other cases where the it's it's into the hundreds the key here is run remote via API means that those work items are being added to cues to Pro to be processed from some external entity an API call happens and that's putting things on the work on the on the Q on the wlm Q and then they're getting processed so that's an

(23:40) interesting pattern we we used a very similar pattern at TIAA we would get a bank load file every Monday morning sometimes that would have 500 records in it sometimes it would have 5,000 records in it those are two very different units of work so if we were to run those on a single bot Runner that could take us eight hours right but if we're able to multi-thread this work by using wlm now we're able to spread that work out across a number of Bot Runners yes and it's essentially multi-threading our

(24:08) tasks across a pool or like an army of devices that can process this work absolutely all right anyone using wlm here okay so like four again look around this is the kind of things that you want to be maturing into this is already included in your licensing right so we're not this is not like a hard sell from either of us uh this is something you already have access to so at the very least leaving this session consider what poc's you might want to create just so you have some background on these different types of automations and so

(24:40) that as you're going to talk to business stakeholders or hearing about opportunities for automation you can think like oh yeah we could actually do this through an API integration or WM would come into play here yeah huge for use with uh document automation right I've got to process tons of documents one bot Runner is not enough Perfect all right let's move on to the scale phase so at the scale phase we would expect that you have either purposely skipped over some of those other solution patterns or you have specific needs to

(25:08) get here now the reason we've put these in the scale phase is because they can be slightly more complex right if someone said hey I just got automation anywhere what should I build for my very first automation probably not this right I mean only because it's going to be a little bit more complex and we want you to start with that stuff that feel a bit more comfortable but have aspirations to mature into something like this and so we call this the I've always wished this app could because we're talking about

(25:37) integration so talk to me a little bit about this embedded experience yeah this this is huge it's back to co-pilot it's back to that whole aspect of of how do we provide a really really compelling uh experience for the business users that word friction how do we reduce the friction in people actually invoking the automation um and this is a great one for it uh I've got a demo video for this one as well uh what this one is talking about is embedding in a collaborate collaborative uh app for ex so an

(26:01) example of that would be Microsoft teams uh that's the platform that we use within automation anywhere uh to collaborate pretty cool that while I'm chatting with Mike I can also think oh shoot I got to run an automation I don't have to leave teams it's all embedded within teams so we've started to use that uh within automation anywhere we have a program we call it automation for everyone and so these are automations that we're thinking about that are not just for the marketing department or for

(26:21) finance we're trying to think about what's a cool use case that literally any employee could take advantage of um and so this has been wonderful for that um and I've got a got a demo of it so so basically this solution pattern is imagine a co-pilot process it's orchestrating between task spots and forms but the whole experience is in teams that's basically what this is let's talk about these components down here sure right there's really three things that make this up well actually

(26:46) Four because you've got the embedded but we've got a taskbot right one or probably more than one yep we have this process and this is through our process orchestrator right correct and then we have these forms yes has everyone here used the form Builder capability in automation anywhere a little bit little bit more hands right it's a drag and drop form Builder you can build whatever custom forms you want have strings have file uploads take credentials there's lots of different ways that you can take

(27:13) in this data securely reference it and use it within your process your process is really what's orchestrating the connection between these forms which I would say represent a human task right and these Bots which would represent an automated task exactly and so you're creating that process here although initiated through in this case an embedded application one other thing I I do want to touch on that I think is a really important differentiator here talk about the context right yeah that's an important I can't read other chats

(27:44) here so talk to me about that yeah so it's a really really important topic so uh if you think about it this way um every automation can either be invoked within the context of a business application or a transaction or not so in fact we're going to have a demo of both this one when we talk about these automations they don't have any context so for example the you know when we talk about context for booking a meeting there's not really any context I just need to book a meeting with with Micah

(28:09) that's different than uh we need to automate something related to an opportunity we're pursuing that's a screen in Salesforce those automations are actually reading from the screens of the business system so they exist in the within the context of a specific business application on a specific screen these ones that we're hosting using this solution pattern run it whenever you want you you don't there's no context it's not like it's reading your teams messages it's just uh

(28:33) teams is just an easy way to serve up the automation so that everyone can get to them easily right and so what we see in the screenshot I don't want to beat this one up too much we see the different processes that I've defined here right yes I would click on one and I would be presented with the form they're going to see it yeah and that form would then enable the invocation of that process which would then subsequently run automations exactly let's click on this so this is one of the automation for

(29:02) everyone uh use cases it's that this one's going to be shown in a lot of detail at at 3:15 um but again the key here is the users in Microsoft teams they've been chatting with someone they can easily pop up the Automation and now you're looking at a co-pilot form uh but you haven't left teams the whole experience is within teams no need to leave it and that's back to this concept of system of work uh that's been presented as well right yeah and in that case you're showing multiple forms right

(29:25) so you're able to go through and subsequent questions yeah that co-pilot process can be as complicated as you want there could be 50 uh different forms but no need to leave teams maybe not a great user experience but 50 forms no yeah all right the next one is co-pilot process embedded in a business application Running On Demand right it rolls off the tongue and I'm sure you all remember this one distinctly this is the now I don't have to leave this page of the solution patterns talk to me about this how is it invocated where

(29:56) does it execute yes what do I I have as far as context so so these these embedded patterns we just talked about the one where I'm embedded in a collaborative app again Microsoft team is a good example of that the kind of application that we collaborate with colleagues for uh this one is no now I'm embedded in a business application so I'm bringing the automation to Salesforce I'm bringing it to work day I'm bringing it to service now whatever that application is so now the automation's coming directly within one

(30:19) of those business applications as opposed to a collaborative app same thing that Michael was mentioning the key ingredients are the same um it's a it's a process that's orchestrating between different forms and task plots but now it's served up directly within the business application and what that means is that now we've got context because well where are you in the application again if we were to talk a Salesforce example um which we will be in in some of these use cases I'm looking at a specific opportunity the

(30:44) automation makes sense only in the context of that opportunity it's processing something to do with that opportunity I like that talk to me a little bit about the different ways that we can have that embedded in Salesforce because you have a couple options here right yeah we've got we've got multiple options here and and this again depends on the system right so um we've got extensions if it's a any kind of web- based application uh within systems like Salesforce there's a there's also

(31:09) several options iframes for example yeah so specifically with Salesforce I've got the ability to grab an app off the app exchange that's one from Salesforce I could use iframe embeds to be able to again embed these forms and embed that experience directly into the Salesforce interface yes I also have the ability to use co-pilot extensions and with co-pilot extensions I can really customize how this looks and how users can interact so I can actually create an extra button here if I wanted to and I could deploy that and roll that out to

(31:35) my users I also have the ability to have sidebars and modals pop up and things like that so I can really customize the user experience on these applications one other question I do want to ask on this before we move on to showing this demo talk to me about what needs to be installed for the end user here right do they have to have a bot Runner a bot agent installed locally or what's what's the deal no so so that's that's one of the nice things about several these solution patterns is there's all that

(32:01) overhead doesn't exist yeah so co-pilot extensions for example that's just a plugin into Chrome as long as it's a web- based application hosted in Chrome that's it so there actually isn't a lot of a lot of overhead that you need on the and I think that's really important when we think about these types of solution patterns that we're looking to mature to I don't have to have the bot agent installed in everyone's machine or anything like that especially if I'm just deploying an frame here I publish

(32:23) that I do my provisioning for permissions in Salesforce for this example and users are able to use it they don't have to know anything about automation anywhere they don't really have to know anything about anything besides just what's going on in this form are there tasks that are coming back to them are they invoking an Automation and this is just their way of getting work done yes all right let's talk about this demo so so here's an example this is an automation uh yeah so this is one we gave our account

(32:47) Executives uh uses generative AI this is actually a pretty cool use case but park that for for the moment if I'm an account executive I'm already looking at an opportunity this whole sidebar this is this basically all represents co-pilot these drop- down lists some of them autop populate directly from the screen right I don't need to know the client name for example because it's already coming from the screen on the sidebar it's now being it's now processing so again the the account Executives at least our account

(33:13) Executives spend most of their time here bringing the automation right to them uh they can invoke it and get their output on the screen here or we can send it separately in some of these cases uh we attach it directly to the opportunity for one last uh point I would like to make here the form forms that you saw populating here I could publish this same process into this app I could also publish it into teams absolutely yeah absolutely yeah so if there's not context involved you can literally publish it anywhere put it in teams and

(33:42) put it in Salesforce and put in whatever your application is got it great all right I think this is the last one we're going to talk about at the scale phase now there are more at the scale phase they can get more complex they can get a little bit more esoteric uh to say that finding a a particular use case for them would be much rarer not to say that it wouldn't happen but let's talk about this unattended plus co-pro co-pilot process yeah this is the phone a friend of automations tell me about this and let's talk about some

(34:12) examples so so this one uh the minute you learn about generative AI this one becomes one of your best friends because what this is talking about is that I've got kind of a happy path for how things are typically going to operate but when I've got a process exception I need to involve a human then I'm going to launch a co-pilot requ for it well if you think about what we talk about with generative AI this whole idea of human in Loop is is actually a pretty important concept right because uh can you fully trust

(34:36) that the results are exactly what you want you might just be experimenting um I'll give you a perfect example in fact the the one that we're demoing here um when everything's fine in the in the requests it it all gets automatically processed the tone of the message changes right the tone of a message I'm getting from a customer the tone of a message I'm getting from A supplier changes we need we need to invoke co-pilot to bring in the bringing the humans into the the process that's exactly what that is so it's a typical

(35:00) unattended uh automation for example it could be running every day at 3:00 a.m. but if something funny happens if there's a process exception then I'm invoking co-pilot so that they can resolve that exception I think another really easy example of this is with document automation right my document automation process is kind of five steps I've got the intake process I've got a classification where I want to understand what type of image or form this is I've got the extraction process so based on the classification what do I

(35:24) need to extract I've got the validation step and I've got the delivery step I have exceptions that can happen a couple places there if I don't get high confidence on my classification I want someone to look at it to validate perfect the results of that classification I can straight through process from there possibly but if I don't get a great result on my extraction or it fails my validation rules I want to get someone involved to take a look at that so there will be some forms that go straight through

(35:49) processing there will be others where I need a human to kind of play the back stop to the automation absolutely and and again the the we're using this internally uh obviously I think the demo we're about to show is a good example but again that co-pilot the fact that it it whoever is going to process the exception again we're bringing those exceptions right to them so if they spend most of their time in workday that's where they're going to process their exceptions if they're in teams

(36:10) that's where we're going to bring in so okay let's talk through this one yeah so this is a this is a demo of exactly this so this is uh this is a use case where suppliers are sending requests to our accounts payable team uh what do suppliers typically want you know things like when am I going to get paid that's a pretty standard question and so the automation uh is running in an unattended manner it's receiving those requests and processing them doing some interesting things with generative AI

(36:34) but for example uh things like sentiment and tone are analyzed and when the sentiment or tone changes in a way that we're no longer comfortable with then it's bringing the humans and off it goes to make a a request in co-pilot so in this case that's where our accounts payable team used to manually respond to every request now 97% of them are automatically processed and they're literally just dealing with the exceptions in co-pilot cool so great for generative AI all right so this is perfect timing because

(37:03) we will have a little bit of time for questions here um let's talk about next steps number one check out the different Frameworks familiarize yourself with these different Frameworks that are available consider doing a proof of concept on those you saw from your peers in this room moving to API tasks is the next best step for many of you at least doing a POC on that so you're aware of the capabilities you've got that in your repertoire of B automation builds so think about that think about optimizing

(37:31) your opportunity assessment intake right how are you taking in Opportunities how are you classifying them against the types of automations that you can create and get in the habit of doing that that will help accelerate the way that you do documentation the way that you set up your test cases abut the way that you do support documentation or your run books deploying managing control room right what access we set up absolutely and then the last one is obviously we kind of mentioned this already but start a new proof of concept I hope you were

(37:57) motivated by some of the interesting ways you can think about automations being invoked and executed through this session but think about how you can create some poc's on these new solution patterns this is a great way to encourage your developers to learn new things take on a new challenge this is also great to inspire business stakeholders so you can show them some of this capability of being able to go back and forth between these applications and this is great for your program evangelism if I want to talk to

(38:24) business stakeholders in my organization and get them excited about some of our capabilities showing them a real live working demo is one of the most compelling ways to do that absolutely if you scan this QR code is this working I hope it is good awesome so if you scan this QR code this will take you to a community page where we have a breakdown of many of the solution patterns we haven't put all of them up there yet but we are going to be breaking down all the rest of them there so if you want to see examples of exactly what this is where

(38:53) it works how it runs uh we will put that there we're also going to be be sharing some documentation templates for some some of those things as well as some Frameworks and we can put some Frameworks up there the Frameworks really don't change a whole lot in between some of these different patterns but uh there can be some variations of that yeah all right that gives us uh five to seven minutes for questions awesome what what can we clarify yes sir um I love the idea of a teams chatot and I've seen a few examples of that so

(39:23) far the the event my yeah keep going keep going you're you're pretty loud so you're good so my main concern with the concept of something like a team's chatbot where you want to be more conversational and immediate is if your unattended Runner is bogged down or your queue is is doing other tasks so how do you prevent that how do you make sure that you don't have lag time between the prompt and the response on those on those Bots thank you that's it's a great question I'll I'll sorry no it's fine oh I have a

(40:03) yeah I was saying you already have one uh it's a great question I think uh one of those PE so the answer to part of that is you really really need to pay attention to your what capacity you have so when we release these like automation for everyone kind of automations we actually put some thought into what kind of capacity we need so how big does the pool need to be so we make some estimates in terms of how many users are likely to run it how many simultaneous requests are we likely to have so we make sure that we size the pool properly

(40:27) I think that's the first thing um and we we monitor that pretty closely not just from a system standpoint but obviously from a user experience standpoint as well right if if users say hey I'm trying to run that automation but it seems to just cue then we we know we're probably insufficiently sized that number one number two is I think API tasks are going to be a game Cher for that as well with API tasks for those of you that are aware first of first of all they're not running on a device they're

(40:51) running on the server so so that that issue of to your point of having that constraint goes away and also response time right if if you're interacting with a chatbot who wants to wait 25 seconds for a response so if there's that kind of back and forth API tasks are going to completely revolutionize that and and unlock a lot of these um but these ones that we've done what the way that we we did it was we tried to make sure that we get whatever the input is initially through some simple back and forth and

(41:17) make sure that we've got everything we need for the automation to run and then if it does take 20 seconds to book the meeting they've already moved on it's no problem okay the other thing I would say is that's an operational metric right I mean we talk about types of metrics you want to be capturing as a program business value metrics operational metrics and delivery metrics operational metrics would say how long did it take for someone to invoke this process and the process actually execute right if I

(41:38) can capture those kind of times that can be an indicator of how responsive our program is uh for these yes sir Jim Frost stand up be loud not that loud yeah so my question is if you're in a business system and you're asking or you're running a co-pilot that's contextual so for example if you're saying on this lead I want to run this bot do you have to stay in that item in that system until the response comes back or can you go to another one trigger another question Etc that's a great question so uh and that's

(42:14) obviously really relevant to what we were just showing for the account Executives um so there's a couple things there uh you don't have to stay there so so there's there's an aspect of the the automation design in terms of what does the output look like and where is it going um so we've done that in in a few different ways and one of the ways we've done it is that the out so there's a notification when the process is complete to the account executive um but the output for example gets attached

(42:37) back into the business system exactly it gets attached back there so that way they're they're not forced to to sit there and wait um and then it's also back back to your point about you know if if they're waiting 15 seconds people are generally patient but if it's a long running process like the example I showed we're going to prepare a whole pitch deck we're going to prepare a whole customized PowerPoint presentation it'll take a few minutes uh so in cases like that um we send them

(42:59) a notification to say check your opportunity here's a link to your opportunity it's attached already ex exactly so it just takes a little thought from a design standpoint about how to serve it the output up in the best way exactly where to put it yeah but user does not have to stay there even if it's embedded or if it's it's not going to stop running yeah it won't stop running if they move you're getting to the point where you're triggering that automation through the control room API the process takes over

(43:23) from there corre if there are subsequent tasks that are created for the user they would show up in that user's task on the uh embedded component so they'll be able to see that or they could go directly to the co-pilot page yes uh I there's another question next to Jim sorry I should have stayed back there all right go ahead when when eding will still work on mobile or on a desktop you want me to answer this go for it so if you embed it through an iframe it would I mean technically as long as you've done some responsive uh

(43:52) design it would technically still work even on a mobile device uh the co-pilot extension would only be available on desktop though it would be available across um operating systems so if you wanted to do that on users who are using Mac OS as well as Windows if they're using co-pilot extension or if they're using embedded that would work for the co-pilot embedded which is the iframe uh that would work again on either operating system but it should also work on mobile yes as long as that web application supports iframes being

(44:23) displayed on the mobile device all right Let's uh we'll take one more if it's a quick one okay you promis it's a quick one it is never quick one and I'm changing the topic too I was just wondering like you know how does support look like with all these Bots you know it's like you keep on building and then it's a totally different area automation anywhere so I'm just curious about how does support look like if you are developing all these patterns it's a loaded question yeah so one thing that

(44:55) we talk about is as you go through from start to accelerate to scale you're going to mature the way that you're doing things like your documentation we encourage the creation of what we would call A runbook and A runbook is basically support documentation for someone who's going to be supporting this automation so where can it fail how can you fix it what are some common errors things like that I want to document those things I also want to make sure that as my automation design and development matures I'm maturing the

(45:21) way that I think about error handling trapping errors things like that so that I'm familiar with the types of errors that are being generated and how my automation can resolve yeah talk a little bit about how you guys are doing air resolution right now because I think you're doing it really well so so one other thing that we're doing along the lines of what mic is talking about is um it's almost like these automations become an extension of the business system so within automation anywhere somebody's got got an issue related to a

(45:47) Salesforce co-pilot my team doesn't get a call immediately the team that's supporting Salesforce gets the first call so so so they've been kind of trained that that think of all these autom they're embedded within your application so so you're the first stop why is that relevant well maybe there's something related to the data in the system maybe there's something related to to what's actually happening in that business application that's affecting the outcome so they're kind of step one they're kind

(46:09) of like the the first tier of support and then know it's something deeper than that it's not related to the business system then it comes over to another support organization uh but it's a good a good question I think it it is true that there are maybe uh more failure points in some patterns than others if you think about from that standpoint if you do failure failure point analysis there's a few more places for things uh to Break um but we operational metric exactly but but we found again these

(46:33) automations uh that we're running in production now we found them pretty resilient which has been been good we should have just said automations never fail and ended the session absolutely abs abs it's like what are you talking about yeah yeah yeah all right well thanks everyone so much for joining this again we have thatr code uh do this feedback one too I don't think have we put that up at all yes all right scan the feedback thing give Fe feedback if this was horrible give that feedback if it was horrible please if it

(47:00) was mildly entertaining yeah you can give that feedback as well thanks guys

YouTube

https://www.youtube.com/watch?v=zMIALwj3v1E