(1) Imagine Austin | Keys to scaling automation successfully -

Transcript:

(00:06) my name is Kristen anglehart I'm our SBP of community and learning here at automation anywhere which means I'm accountable to all of you and our customers and partners around the world that you have the training the tools the peer programs and resources you need to thrive on the automation success platform so if you don't have those things uh myself and my team are accountable um and SEL come on up and grab a chair and before we get started on our conversation with all these awesome panelists what's more exciting than a

(00:44) Safe Harbor right please make investment decisions based on currently available technology I think that covers everything um so Mahir and Audie were both talking about our our system of work uh earlier this this morning and this is incredibly powerful technology but what uh we all found on the community and learning team traveling around the world literally and meeting with so many of you was um as program leaders driving automation transformation through your organizations you are not just building a bot or leveraging a piece of the uh

(01:24) the automation success platform but you're building a program you're building a strategy for growth and that is a whole different muscle and movement than just using the technology so let's spend a moment on how these amazing customers I'm going to introduce in just a moment um are scaling across the automation success platform with the Pathfinder program and I think now is a great time to just do quick introductions so sentel starting with you and we'll pass the mic will you just say your name role and Company my

(02:00) name is name is senel Marin I work for GM Financial my role is assistant VP I lead the RPA development team have a team of uh developers bsas platform admins supporting the program with that I'll pass down to you mial rubel from amcore technology in s Arizona a manager of the transformation team there my name is Rick weld I with Frost National Bank out of San Antonio and I'm the uh RPA product owner for our group and I am Jason Woodford I am the director of Enterprise automation at Accent Care uh so just managing all the

(02:40) day-to-day Enterprise automation activities all right now I'm going to sit down so I have my microphone this is a stellar group of people and I'd be remiss if I didn't point out one other person who's going to kill me Ricardo who has driven so many of these Pathfinder workshops with many of these customers and customers across the US and is really helping us scale that program so if you have questions about the program after talk to our customers but also please talk to Ricardo okay so well we went through the

(03:14) introductions we know who these amazing leaders are and just a quick beat on the Pathfinder program I mentioned that so many of you had told us frankly in no uncertain terms um I need more help in a different way and what I'm trying to do is is punch through to scale in a few different areas and we heard that so many times that we created together with our customers the Pathfinder program regardless of where you are in your growth whether you're just starting out and you want to focus on quick start

(03:47) success mission one or you're ready for generative Ai and you're hyperscaling at Mission seven or anywhere in between um the Pathfinder program packages literally 20 years of expertise um from our customers our community automation anywhere our partners and um we have brought it live to uh over 40 Fortune 500 customers around the world including um this great group of of folks now prior to Pathfinder right um this is our first question for the group uh it's a commitment you know you guys sat down

(04:25) with your teams and you invested an entire day in learning best prac you selected your missions for scale um we do the one-day Workshop we share all the best practices and then we walk away with a 90-day action plan for growth and then you work the plan right and many of you are still working the plan um so before participating in the workshop there's always like a cist right a reason why you said you know what let's gather and do this and there's some challenges we think we want to tackle we're going to commit the time so I

(04:59) don't know Jason all the way at the end of the table let's start with you um can you share with the group sort of where you were uh at the moment that you decided to sit down and and tackle a Pathfinder Workshop yeah for sure um so I would say prior to going into Pathfinder we knew that we had gaps but we didn't know exactly what those gaps were we weren't mature enough to know what we didn't know basic basically um so actually we we had started with a couple automations we had started growing and it was a good

(05:37) opportunity to kind of step back with a Pathfinder assessment and say okay me and the team like let's take this assessment and let's figure out where we are because there were certain areas that we thought we were really mature in that after taking the assessment it turned out we were kind of green in actually and there were other areas where we thought we were pretty green that we were actually doing pretty well in um so it was just really en lightning to be able to shine light on the areas where we wouldn't have ever even known

(06:06) that we weren't excelling at um that's what I would say to start I think that that um Jason is something I'm sorry I'm leaning into the microphone that we hear a lot is wow when I took this assessment which is the first hour of every Workshop I didn't realize how strong we were in some areas and then there were some some ahas um centel you too uh what were some a from from your assessment sorry leeding in again what were some ahas from your assessment and and some of the catalysts for for jumping into Pathfinder so one

(06:39) of the first feedback I gave to my um uh development manager was I wish we had done this Pathfinder session maybe in the first year of the program so being in the program for like three years um we never paused to kind of gaug where we are uh never had an opportunity to have an holistic uh evaluation of the program till Pathfinder and the first hour that she mentioned is where we did that uh there were like five key areas which is the program the people the pipeline the production and promotion those were the

(07:13) areas that uh the automation anywhere folks took us through in the first hour and made us do a self-scoring and that kind of gave us like a baseline where we are and this is something that uh from which we realized that we are probably in the accelerate stage of the program there's so much we can do to go to the scale which is the high end of this uh program and uh it's been a great uh self- evaluation uh opportunity for me okay thank you um so how has um you know let's let's talk about some transitions right um there's

(07:52) never a perfect time to sit down as a team and and conduct these assessments and really dig in and say where do we want to go where do we want to grow a couple of you are doing you know are in the midst of some actually really interesting transitions mikal um you are making a transition Rick you as well sometimes you're transitioning from one platform to another right uh a different vendor and sometimes you all are um transitioning from like the a360 migration from on-prem to Cloud right these are probably the two most common

(08:28) migrations and for those of you who are thinking is this a good time for me to like you know dig in on on uh on our program and our health um M what can you share about the transition you were in and and what you learned sure so we've been transitioning from Blue prism to automation anywhere um and we definitely wanted to take a advantage of introducing a new tool evaluating our old processes so our whole strategy was to uh focus on governance and doing it right this time around so in our initial evaluation we had close to 100 processes

(09:02) and found that 25% of those didn't need to be migrated so um with that coming to light we wanted to make sure we focused on governance uh working toward a Federated model eventually and working on our pipeline okay I'm sorry who here doesn't have a huge backlog and realize that maybe at least 25% of the processes didn't necessarily need to be automated right that's probably not uncommon um a completely different kind of transition so Rick uh what were you guys in the midst of and and why did you

(09:36) decide to choose Pathfinder yeah so currently we are in the Pro uh process of migrating from b11 to a360 um and we we decided to go through this program in the summer when we were just getting um kind of doing our preliminary stuff to get ready for the migration because we wanted to get a baseline of where our program was today and kind of to Jason's Point understand what we didn't know where we needed to improve once we got on to the new platform so we felt it was a great time to step back assess everything and kind

(10:10) of put plans ahead on the areas that we needed to improve once we completed the migration so you're ready to get started right out of theate R right on Okay so we've heard from these leaders um all of you sort of a little bit of the catalis for change or where you where you were when you embarked on your workshop and um the assessment right and we actually heard from you guys like this really helps an organization understand where we are where we're actually stronger where we may be weaker um I hear a lot of times

(10:46) including from from all these leaders that this allows us actually to have a different conversation with our executive team like we're not just running an automation program in a vacuum but we are understanding where we are against our PE here so that's incredibly valuable um but once you do your assessment then you select your missions right and so the the fun fact about all of these uh amazing leaders is you all chose the same missions which if anyone was in the previous um Pathfinder session almost everyone of our customers

(11:20) chooses some version of the similar missions around promotion and engagement um how to fine-tune the production life cycle and how to optimize the ration Pipeline and you you guys are no different right so understanding that um I don't know Jason let let's pick on you um will you tell us a little bit about as you're going through your missions that day you know there's all these conversations you wouldn't normally have and there's probably some aha moments um what were a couple of them that kind of

(11:53) blew the team's mind yeah for sure um so when we started we thought you know we're just going to sling some Bots right we're going to we're going to make automations and we're going to crush it um which is really a couple of steps down so I think our first biggest aha moment was the value of promotion and marketing um because we had basically initially relied on people coming to us and saying hey we have this process can you help us automate um and that happened a little bit and we had a smaller pipeline but

(12:26) really once we changed the mindset to showcase seen our successes and our capabilities people came out of like the woodwork to ask for our help um so that was one big aha I think another one was probably the the benefit of kind of reusable assets whether that's like form documentation like there's SD starter templates whether it's making task Bots to handle audit logging um anything that you can do to allow the developers to focus focus on just solving the core problem rather than like Reinventing

(13:03) those patterns that you're going to do over and over again that was really big that saved so much time and then gosh if I had to say a third one um it was probably how to better engage QA um when we initially started the RPA program we had worked with our QA team to make them responsible for execution and realtime monitoring of the Bots to QA it that was actually causing more problems than it was helping but after talking to the Pathfinder group and the Pathfinder Community they kind of pointed Us in the

(13:37) right direction of blackbox testing and an appropriate way that we could leverage QA without overdoing it so those are the three big ahas I would say we had those are some pretty big ahas they were um but I like what you said Jason about you know we were in a stage where people were coming to us and then you know every organization plateaus um but you pivoted to engaging your audiences and they're coming out of the woodwork and I find over and over those of us who are driving Technology based Transformations you know we're pretty

(14:12) excellent at running a program right pretty excellent at driving technology changes but we don't wake up every day and say I am a chief marketing officer right that is just not a comfort zone for so many of us so that's a really interesting aha um centel you had a couple of ahas as as you were working your missions um what do you want to share yeah for me uh the one thing the Pathfinder uh really helped was how we can demonstrate value to the business uh prior Pathfinder I think our we used to demonstrate value primarily

(14:49) by capacity release showing how many Bots we delivered how many maners we saved but then uh in the Pathfinder uh we realized that so many other VAR ways also we can demonstrate value we can demonstrate value through productivity cash flow accuracy Assurance user experience there's different ways in which we can show how this program is very valuable to the business and that was my key learning from the Pathfinder okay and you know many of us when we start out building our programs we measure what's easiest right like the

(15:23) number of automations the number of processes these are things that are right in front of us and easy to measure um but back to promoting your program and engaging your stakeholders um what does that really tell you right I deployed 60 Bots you know awesome but what does that mean for the business so I like the fact that you are thinking what is important to the company as far as managing cash better or improving the customer experience um and so that that I think is one of the most meaningful ahas that we hear univers and obviously for

(16:01) mental um okay so everyone chose the some similar missions mission two again was about promotion and engagement and I I just want to take a a deep dive on that again because it's so outside of our normal Comfort zones right so um mikal we haven't heard enough from you um can you tell us a little bit about some of the promotion takeaways and and what you're working on in your 90-day plan um so for us it's a big focus on governance again just to kind of build that trust uh again with our factories

(16:34) so we have factories in multiple countries around the world they're all kind of they were all working on their own developments for uh automation but we want to make sure that we built that Center of Excellence team had a solid governance put together and that we communicated that out to the factories to encourage them to use this new tool with confidence um so part of that 90-day action plan was to come up with that strategy and communication to make that work for all the factories so trust in governance big theme for all

(17:02) of us especially as we Branch into generative AI um I think mial what's powerful about you is you recognized that your executive team had concerns right trust issues that's for sure um where did like where did that come from were they like Mahal you screwed up we don't trust you or was it something a little bit more nuanced no I think just with blue prism it was difficult to maintain um once people put a process into place you become dependent on that process so if you know you have a regular occurrence of processes coming

(17:34) on board not being able to keep them going that might keep ideas from coming forward so we wanted to make sure to to stop that mind or that train of thought and you know Inspire confidence for the new process okay excellent points and that's really knowing your audience um Jason you actually engaged some new business units in your promotion efforts and you're in the middle of that what can you share yeah for sure um so one of the things that we did was we kind of brought the concept of a mega Sprint to

(18:04) certain functional areas what we did was we basically started out with Finance because we hadn't initially made any inroads into finance and so what we did was we started at the top of the food chain on finance and we got Buy in from the CFO and we said hey we've got an automation team that has licenses they have capacity they they can help you if you're all in we can be all in for 90 days too and what we'll do is we'll get together we'll have a whole day session where we talk through the pain points really just

(18:35) dredge out everything and then we basically identified the areas where we felt like automation could bring the most value to that business unit and then we basically just worked down them like pretty exclusively focused on finance for the next 90 days we had regularly scheduled touch points um and then we actually finally held a 90day readout with that Finance executive basic basally highlighting all the work we had done what was still in the hopper and the value that we had achieved and that was super successful um so we're

(19:06) actually going to repeat that over we actually started another one for the HR business unit as well and that's kind of one of our plans right now is to specifically engage those specific functional areas okay congrats on that growth that's awesome um let's take another Deep dive on mission three three okay you guys are like well what's mission three Kristen and that's really about fine-tuning your U production and delivery process and um so many of you Excel here in fact when we did our maturity Benchmark which by

(19:43) the way you can find Pathfinder mission control um this was actually an area where universally was probably scored the highest but everyone still had gaps and where they wanted to be with their production um processes so Rick we have not heard enough from you um can you tell us a little bit about some of the takeaways on your action plan um when you were going through the the best practices for production and delivery yeah absolutely so one of the things that really surprised us was our actually our engagement and people um

(20:17) scores were really higher than most of the companies in our vertical um but uh one of the things that kind of validated us um in going through the Pathfinder program was our production score was a little lower than what we wanted um but we knew this kind of had a feeling going in and um so it kind of validated what we needed to do uh for when we get into the uh new world of the a360 and building up our reusable code libraries um Shing up our STD templates and just kind of our our automated documentation process and kind of

(20:51) standardizing those uh moving forward okay um yeah SDS is not not something you necessarily like are always thinking about and I really appreciate it about that as one of your ahas is like this is an area where we we can really tune things up um okay Jason uh how about you what what did you take away on your 90-day plan here gosh for for mission three productionizing what I would say is I I've told the story a couple times and I think the risk of Burying my soul our automation program was being successful through sheer force of will

(21:35) on the developers uh like like Focus everybody was working really hard everybody cared greatly about pushing out good code and making sure that everything worked and we were doing great which is awesome it's just not a very long-term tenable solution relying on people to give 110% every single day I hope that we can do that but really what we did was um we spent a lot of time focusing on the documentations and pulling all that information out of developers heads and putting it into we we've actually been leveraging

(22:15) the service now uh knowledge base where we've been putting run books pdds sdds basically any sort of supplemental documentation for productionize so that way if a new person comes out and they need to do prod support they've got a searchable repo available where they can kind of understand the high points what the input file is like where the the beyond the Lookouts might be so I I would say that was the biggest shift we made in mission three was doing things with with purpose repeatably rather than just

(22:52) happening to get it right on the first time and these are such important principles of scale doing things things intentionally with purpose and repeatable um and we hear that consistently um appreciate the cander but I think you probably have a lot of shared compatriots here in the audience on that um okay there's another mission you all chose mission five and this was really around your pipeline you wanted to improve maybe the quality or value of ideas coming in maybe you wanted to improve how you evaluated scored and

(23:29) calculated them um maybe you wanted to improve how you were engaging with your stakeholders on on your pipeline to fine-tune that so um there's a couple of you that have done um some really interesting things um Mall how about back to you what are some of the steps you've taken or are prioritizing to optimize your pipeline since the workshop um so yeah one of the steps we wanted to focus on was to create a demand intake form and process to kind of deal with any new ideas that came up we didn't want to end up in the same

(24:01) boat that we were in before where any automation idea came on as long as the manager rubber stamped it it went through we just wanted to make sure everything that was coming through was of value so we wanted to make sure uh that we could develop a template that was good internationally across all our factories some of our processes span multiple countries um accounting Finance processes for example um so we wanted to make sure all that was in place um and at the same time we wanted to make sure not uh sty any progress so as our Focus

(24:31) right now is migration we'd want to make sure that that momentum keeps going so that we keep ideas coming through so okay that new intake process I think is probably going to be pretty valuable again finish your migration ready to grease the skids there um centel now you have done some really interesting things as as GM Financial is actually ready to explore generative Ai and so you're pretty aggressive there with your team um how have you been exploring those use cases with some of the the best practices around

(25:06) pipeline uh some of the use cases that we um we found out from the sessions that we had with automation anywhere were um like one use case was about finding uh fraud in in the documents that we handle automation anywhere is now doing a POC for us uh to be able to find fraud then there's these other use cases about a corporate assistant that all employees within GM Financial can like go into the teams and ask various uh policy questions and things to the to the chat bot so that's another use case that uh we came across from our from our

(25:39) interaction with our automation partners and finally there was about this Scope Pilot where we are able to embed custom region into applications that don't have gen AI but through this embedded region we are able to bring in geni to those Legacy applications so some of the two applications that we have currently been able to embed a custom region one is the teams and another one is service now both are right now in the POC uh stage but we hope to be able to get them productional IED pretty soon so I think

(26:10) this is so interesting how again uh these different organizations might choose the exact same Mission but have very different outcomes based on where they are as an organization so mial you were able to really fine-tune the intake whereas centel you cracked open the the use case pipeline right on gen um Rick I I want to touch for a moment on you you tackled I think was it a new intake form when you were on this mission right so um our intake process was as probably some of yall are in the same boat was either word of mouth or an email or

(26:49) teams chat you know that hey we we need a new bot so we um the earlier this year we standardize and and launch a intake process through our companywide ticketing system service now and we developed uh specific questions to proactively start capturing information about business justification metrics and more so just to get the wheels turning with the business stakeholders so by when they're putting their request in for new Bots or enhancements to bots they've already been asked this on the front end so by time we come around to

(27:26) our Discovery call uh with them we can really dive into their business needs their justifications their pain points help really understand their their driver behind Automation and their their return of investment for themselves as well to help them flesh that out as well and since we've implemented that we've seen not only an increase in volume but also quality of requests that have come in for new Bots or or major enhancements to existing bots so I think that last point Rick is so important volume is

(27:59) great but quality is key right I think everyone canive some nodding heads there um so we touched on this already and and thank you for actually being so preent and answering this question um mission 7 is our brand new mission for hyperscale it's how to get started with generative Ai and I'm really impressed centel with what Jam Financial is doing I think that one of of um the key pieces of the the mission execution plan here for how to get started is the concept of that that proof of concept and it's a it's a great

(28:38) place to start you highlighted a couple of the use cases you're going to tackle will you just share a little bit more about your first POC and sort of Who's involved and and who are you working with from automation anywhere so some of the PC that I mentioned like the the corporate assistant or adding the the Gen capability through copet to various applications like teams and service now and finally the one that came in recently was Finding fraud in documents in contract documents um so there there are two approaches that we

(29:11) are looking at one is uh um either using Azure open AI uh as our llm platform or using Google vertex I know automation anywhere uh a lot of the PS that they have done internally they've used Google vertex and that's that's kind of going to influence the direction that we take for us right now it's deciding between these two um uh llm Solutions is where we are right now um we are in a hold holding stage and once the senior leadership within GM Financial makes the direction towards either going towards

(29:43) Azure open or Google vertex I think these pocs will be able to move forward and deliver value to the company and it's good that you bring up the the llm choice it's something everyone has to make right and um it's sort of like ah we're g to be Pioneers here in this area which direction do we go so I think one of the most important things is and essentially reference this a little bit um and you heard this from Audi this morning we're really agnostic on the vendor we are supporting your entire application

(30:16) estate if you will um and so we're really excited to see see the outcome of that and I know people are going to probably Hound you with questions um in the future on that okay so we talked about reasons for engaging in a Pathfinder Workshop the challenges you want to solve the missions chosen self assessing your program against your peers and then of course gleaning the best practices the AHA moments um the biggest thing that happens though is the outcome right yes teams spend a whole day in the workshop but it's the 90 days

(30:51) that follow that's so important and we divide our action plans into 30 60 and 90 days days it's the it's our customers who decide what they're going to put on the action plan so everyone is different and unique um sometimes you create your action plan I know a couple of you and you're like and now we're going to pause on that get through a migration pick it back up and some of you jump in the very next day right um I want to spend just a couple of moments on some of the top priorities and and achievements so far

(31:23) Cal you talked about your poc's um call a couple of of key priorities for your action plan what do you want to share uh sure so as I mentioned before governance being top importance for us um we really been focused on putting that document together uh getting our Executives to kind of look that over put their stamp of approval on it and kind of figure out that plan to get that out to the company worldwide um so that was top of the priority list for us um so we have accomplished at least a very good first

(31:53) draft that everybody's on board with it's kind of a working document that everybody kind of keeps going with but at least we have something in place that can be communicated out to all the other um leaders out there for our automation team um as well as the demanded take form um that's been well established now and um should be able to work for all the factories worldwide so that's awesome um Jason you got a A couple of priorities on your action plan I know around upskilling and metrics what do

(32:21) you want to share yeah for sure um so there were a couple really tactical things that we had on our action plan some of the things like I talked about like for example getting all of our documentation cleaned up that was one of the things on our action plan um making a couple reusable task Bots was also something on our action plan um that's been on our side there there were a couple you know much larger kind of crazier ideas we had so I work in a healthcare setting and one of the 90-day ones that we had talked about was

(32:53) partnering with automation anywhere to kind of do like a ride along with a a clinician like a day in the life of a clinician especially with all the generative AI stuff coming out we feel like there is a huge untapped automation potential in the healthcare space um and really wanted to see if we could leverage you know some of automation anywhere is Best in Class like insights um so those are a couple of the things that are on the on the action plan like you say also um upscaling we have a mix of kind of professional developers as

(33:28) well as smart people from the org who we have picked to be developers you know so trying to get everybody upskilled through AI University um take the certifications and everything those are kind of four of the major themes that we had in the uh action plan it's pretty ambitious it is an ambitious plan congratulations though all right um oh we cover we just covered up Skilling so you're right ahead and um let's just spend one more moment on metrics and um in our previous Pathfinder session we talked about the importance of looking

(34:04) at metrics in sort of three different levels obviously there's the the uh transactional metrics right um operational metrics of your how your Bots are running and their performance and uptime and then of course we talked about CLE you were sharing the business value metrics what is important to the executive team um can I just get a hand raate of just someone who wants to share where you are with your metrics now who wants to share Jason go for it I mean so not to restate what you basically just said but um we have kind

(34:40) of Taken automation anywhere as best practi isn't gone with that so from a transactional level what we do is every week we produce a kpi spreadsheet and that is either the number of widgets that have been processed through an automation or a success rate uh basically what was able to be automated versus what needs to be handled manually um what we've done is we've kind of Taken statistical process controls and and laid that on top so that we can at a glance see what is out of control for example if something normally does 500

(35:13) widgets a week in one week it's at 200 that's maybe cause for concern um so we we do a lot of those sort of operational kpis we also monthly like you say we put out um number of ideas generated over the last 30 60 90 what are the value of those ideas are we getting good representation from all of our business areas or is it pretty heavily stacked towards one that sort of program recap of ideas delivery um just at a pulled up level and then the the thing that I do last is once yearly I will kind of provide a a true Roi I guess I'd call it

(35:54) um licenses Plus staff Cost Plus training all of that compared against the actual real cost savings that we have gotten approved through finance and just kind of providing that total percent ROI that the Enterprise automation team is is creating those are the the three levels we're reporting at today okay it's pretty rigorous okay I can add just real quick please do we had the operational metrics in place for the most part but I think we're able to focus on those but just to add on to what you were saying we didn't

(36:26) have that our way metric for evaluating our processes before the the whole Pathfinder uh Workshop so I think that's a big important um metric that we're now focusing on and we'll keep an eye on going forward so okay excellent um now we're at oh yeah do we have one more or oh Rick please go ahead yeah so one of the things that came from our session was um the operational metrics and all those things as well we were reporting on those but for us because we're a bank you know there's a lot of compliance and security and and

(37:00) penalties um that that can be associated with uh mess ups or in you know missing information or late information so we start op reporting on those avoidances to to go along with the cost savings as well too so okay and you know error avoidance is not necessarily something that is top of mind but when we have those conversations there is like with Rick's team an an aha moment right where you're like you know what this would actually be really really valuable to tackle so we've talked through um why you decided to tackle a

(37:35) Pathfinder program what you were trying to accomplish how you assess yourselves your mission selection best practices and working the plan um we're going to switch to Q&A in just a moment but I have to say that this is all now available live today you heard Audi announce this at Pathfinder Mission Control you can take the self assessment with your your team you can pick your missions Mission or missions for scale all of the best practices are there and you can build your action plan with the same exact resources that we've done

(38:08) live with all of these folks um so check it out you guys and in addition to the theme of upskilling um we also have now Pathfinder Academy 40 brand new completely free digital courses who hasn't said I want more of those Micah videos you know I hear that when I travel around so Micah and his team built out this entire program and I really want to make sure you guys know that those resources are live today um at your fingertips it's a great thing to do with your team to figure out what are we missing what are our gaps where are

(38:45) we doing really well where do we want to break through and have some of the same results that that you're hearing from these leaders um so with that in mind the best part is the Q&A I know this group has got to have some questions for this team Kate can I put you on the spot as far as a microphone Runner um and do we just have the one microphone folks okay and then we'll just we'll just be creative um you guys raise your hand who has a question so I'm kind of curious on Staffing we're a really really lean

(39:18) organization we started our RPA journey in 2020 late and it's really I have a a team lead and a developer and we just had our senior developer team lead leave us for another position so we rely heavily on offshore we don't really have a Coe we're really focused on development and Operational Support is where we're really hurting right now so I'm curious how you guys are staffed offshore permanent employees and and what that looks like because we find it really challenging to do a lot of this

(39:47) because we don't have a lot of resources to do it so okay I know some of you guys have some some thoughts to share here want just yeah thank you bring the mic who wants to go first it's a great question question so we have uh we have more people on on site than offshore but offshore has been very critical for our production support uh they come in like 4 or 5 in the morning for us and they monitor to make sure all our Bots are running up and fine even last week they identified a production outage early

(40:17) that God is our admins involved right away and we were able to resolve that pretty quickly so having that offshore component uh has made it uh we are able to provide a longer window of support uh then uh and then also we have our it also depends on the roles for example a BSA role is something that uh we only have on-site team members we don't have any offshore that is a role that needs to work closely with the business so we felt that that needs to be on site and we have our platform admins both our platform admins are on site right now

(40:48) but there is some thought process of how we could bring that skill set offshore as well so depending on the role uh I think uh you might want to like for example if if it's like production support or if they're working on a less critical bot that something can be done offshore but if it's a critical Road like platform admin um or something they're working on an high Roi automation I think you would want to do it on site did any of you guys start out the way this gentleman did with like maybe just one developer or yeah Jason

(41:18) yeah I mean I don't want to take I I will say broadly I feel your pain I have a extremely team as well so currently I have two developers and one BA I mean so I get my hands dirty quite a bit as well we have we had engaged um some offshore production support I will say at the end of last year and we we just weren't able to find the right fit um it turned out most of our Bots go idle overnight and so hiring offshore contractors to watch the Bots and provide prod support overnight isn't actually super effective in my use Cas

(41:56) so I would say kind of just be aware of when you might need additional support um the thing I'm trying to do with my management this year going into 24 is basically trying to as we identify use cases trying to build in like a teeny bit of prod support for that use case you know so hey like if you want to get like the $60,000 Roi it's going to come with a $10,000 offshore resource ask but I mean I feel your pain it's a struggle with a small team so me and the two be me and the two developers like we each take a

(42:30) week of production support right now and and we do that like 247 so it's not totally solof for on my side okay yeah we would look to do something similar off but your point of when BS are running that's a good even thought about that but we have Bas that that typ we staff Bas and they just decided to learn RPA so they're also doing development work but we we want them the VA is working with the bus working for us and everything else we can so I sense bigger conversation after this session we might have time for I

(43:07) think one or two more questions do we have a hand we have a hand right here L this lady with the cool red glasses I I'm just interested in um I think it was Jason or one of one of you said something about cleaning up your documentation so our teams are lean same way and we're Healthcare um what level of documentation do you produce and is it the tech side or is it like your Bas are doing in Discovery doing a full kind of PDD what does that look like for you guys I think it was Jason chart uh so I'll take a crack at this so what we

(43:46) have for PDD pdds are pretty full business requirements back just like what a a human sop would be um what we have started doing is we've created these like onepage run books and they're basically everything that you would need to know about a bot's operational running from a tech side like um it's going to run a report on this machine and it's going to drop that report into this folder and that's when another bot kicks off and it's going to do processing on a local computer until the

(44:21) bot finishes at which point it's going to write it out to a database kind of like a like a cliff notes of the automation um so we've got yeah pdds hyper detailed sdds which are kind of like the highle conceptual steps that the bot is going to take and then those onepage run books to kind of like Bridge the day-to-day running of it I would say if that makes sense so the SDS are more of bus process uh so pdds are the business process the sdds are the technical design yeah yep like we're going to get the file and

(44:54) then we're going to process it and then we're going to output it yeah exactly okay so a tiered system excellent um okay I think we can do one more question if we have one do we have one more question okay all right oh yes sir guys talked about business intake forms and so we actually had business intake forms initially and we found the business didn't want to take the time to actually fill them out so I actually deterred them from creating or coming to us to create bots so I don't know how you have you automated that process make

(45:31) it easier for them to create these intake intake forms Rick or mial I know each of you are well I think let's have mial have a chance first I think you wanted to say something just for myself really quickly um we were meeting with the businesses to start with and that's kind of our approach to start with is to kind of take that burden off of them so I'm sitting there with the business owners and filling out the form making the questions simple and translating to start with so I think that's our

(45:57) approach to start with is to take the burden off of them um you know setting up meetings especially if it's a complicated process right and then eventually I think we'll try to come up with either a simplified form or something with all the definitions there and explain it to everyone so at least that's our game plan for now and Rick so I got two-part answer to this one um we were meeting with the business before into basically what I did was I took some of the questions that we were would ask in those Discovery calls or those

(46:28) discovery meetings and I embedded them into the intake form for the reason of when we start talking and meeting with them it's not the first time they're asking the questions so some of the metrics hey how many times a day does this process run how how many transactions do this run how many people are working on this what is the start to stop time for a single transaction it wasn't the first time they were hearing this and so if they needed to go back and think or research or talk to it they could come to the Discovery meeting a

(46:55) little bit more informed um and to your other point if they don't have time to answer a form or fill out an intake form how much time are they going to have to work with you to document their process step by step and then you you can turn it back to them and say hey well this obviously is probably not a priority for you so um that was that was our approach and excellent you guys I know we could keep talking we're going to lose the room to the next session can we please thank all of our panelists here thank all of you

(47:27) go check out Mission Control you can start gaining the same insights today and check out Pathfinder Academy thank you everyone

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