

| Guide to Conducting Process Walkthroughs and Re-engineering Workshops

Conducting Process Walkthroughs (1/2)

Goal:	Confirming or rejecting the process for automation, and enabling the business case to be finalized
Who should participate:	Process Analyst, Lead Developer, Team Supervisor and SMEs
Approach:	<ul style="list-style-type: none">• Block 2-4 hours with the business process team.• For each high-impact automation opportunity identified, review the data collected with the Supervisor and SME(s) for accuracy.• Ask the SME(s) explain the business process. Make notes for your reference.• Overlay Process Architecture details in the inventory i.e. Process Maps, Volumes, SLAs, Throughput, Seasonality, Locations, Administrative & Processing staff, Process maturity and complexity, Complexity of technology infrastructure, Existing digitization levels, Upstream and downstream process etc.• Conduct a process walkthrough with the processing staff, at their desk. The goal is to observe how the staff member performs the process vis-à-vis the information provided in the inventory and the overview.• Process Analyst should estimate the AHT-per-transaction based on the walkthrough. Lead Developer should observe the technology stack of applications as well as any “macros” being used in the business process and notify the Process Analyst in case of red flags.
Output:	<p>Only 1 of the below is needed:</p> <ul style="list-style-type: none">• Updated entry in Process Discovery Tool• Updated entry in Process Selection Criteria Template• Completed Initial Process Analysis (IPA) template

Conducting Process Walkthroughs (2/2)

Best practices for ensuring a productive process walkthrough:

- ✓ Process Analyst should observe at-least a few transactions being processed by the SMEs. Also, observer at-least 2 different SMEs process the transactions to gauge the variance and bias.
- ✓ If possible, use Steps Recorder tool provided by Windows to capture screenshots while you are doing the review. This can speed up the PDD creation down the road.
- ✓ Have a clear understanding of what drives the process – i.e. Where does the input volume come from, whether it is structured / unstructured / machine-readable, does the business process/system(s) pull the transactions in or does upstream pushes the transactions; What are the SLAs, market deadlines and cut-offs – and what downstream process/systems does it feed.
- ✓ If the business process incurs transaction volume spikes, enquire how the SMEs manage such situations This insight will help in estimating the number of dedicated and temporary digital workers the process will need after automation.
- ✓ Process design for humans and Process design for digital workers need not be same as a Digital Worker has more skills than it's human counterpart. So whenever appropriate, “re-engineer” the process to make it more conducive for robotic automation.
- ✓ Capture KPIs e.g. start/stop time of the process, Average Handling Time (AHT), re-key/4-eye corrections volume etc.

Re-engineering Workshop: As-Is Process Mapping (1/2)

- The purpose of As-Is Process Mapping is to create a visual map of the business process in collaboration with the process staff, which will then act as a baseline to pivot to a To-Be process map. However natural biases and effects of inconsistent training become apparent over time resulting in differences between how one individual processes a transaction as compared to another. Hence the As-Is process mapping should be executed so that these biases/variations are eliminated and an accurate representation of the process steps being performed today is documented.
- **T+0: Create As-Is Process Map**
 1. Block a meeting room with a whiteboard and keep sufficient supply of post-it notes, pencils, markers, white charts and adhesive tape.
 2. Identify SMEs in the business process under review. Divide the SMEs in groups with at-least 3 SMEs in each group. Schedule 2-3 hours with each group for the same day.
 3. Group 1 and Process Analysts collaborate so that the SMEs create a first draft of their business process up on the wall. Process Analyst#2 should document the draft process map in a business process mapping tool.
 4. Group 2 and Process Analysts collaborate so that SMEs review the first draft produced by Group 1 and amend it wherever needed. Process Analyst#2 should document the updated process map in a business process mapping tool.
 5. Group 3 and Process Analysts collaborate so that SMEs review the second draft produced by Group 2 and amend it wherever needed. Process Analyst#2 should document the updated process map in a business process mapping tool.
- **T+1: Gallery Walk**
 1. Divide the rest of the staff (not SMEs) of the business process into groups.
 2. Schedule 2-3 hours with each group. Have each group come into the meeting room where the as-is process map is still up on the wall.
 3. Each group should review the As-Is process map and agree – or make changes – to it.
 4. The final version of the As-Is process map should be incorporated by Process Analyst#2 in the business process mapping tool.
- **T+2: Consensus on Standard Process**
 1. Schedule 2-3 hours with the SMEs from Groups 1, 2 and 3.
 2. Groups 1, 2, 3 should review the As-Is process map produced at the end of T+1. Expected outcome here is a consensus across the groups on the process map.
 3. Process Analysts record the final As-Is process map in a business process mapping tool.
 4. Process Analysts conduct a process walkthrough with the SMEs using the final As-Is process map. Goal here is to assess the variation between the As-Is Process Map vs. the activities actually being done by the SME. Ideally, the variations should be minimal.
- **T+3: Sign-off**
 1. SMEs / Process Analysts present the final As-Is process map to their management. Expected outcome is a signed-off As-Is process map.

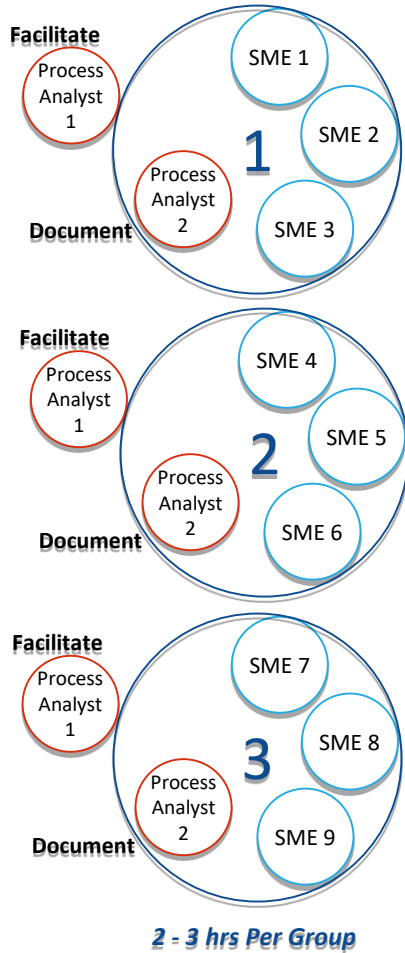
Note:

- While size/complexity of the business process can influence the duration of the As-Is workshop, ideally it shouldn't take more than 4 days to map out and agree on the As-Is business process.
- As a best practice, two Process Analysts should coordinate the workshop where one engages the SMEs while the other documents the process map and makes notes.

Re-engineering Workshop: As-Is Process Mapping (2/2)

T + 0

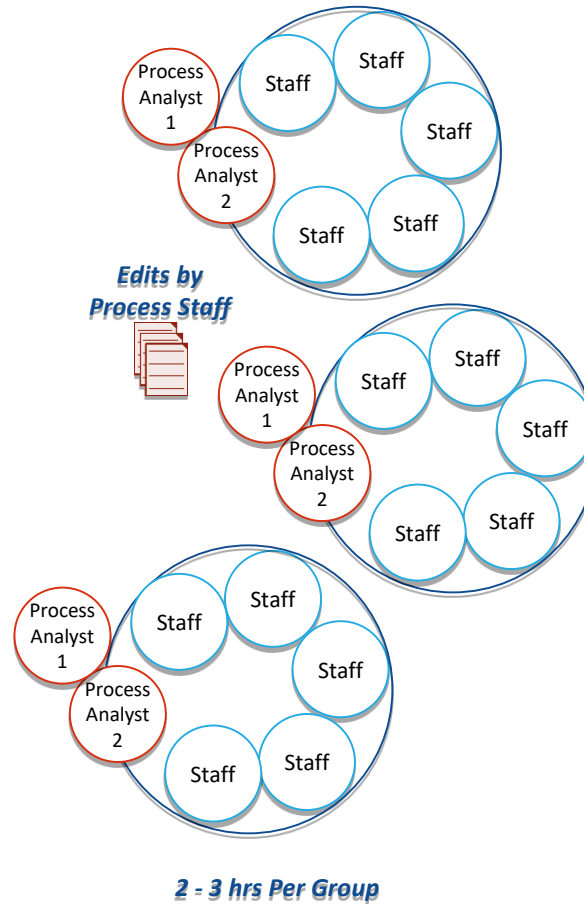
Create As-Is Process Map



T + 1

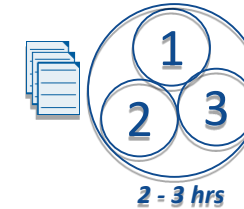
Gallery Walk:

1st draft of current state by Process Staff

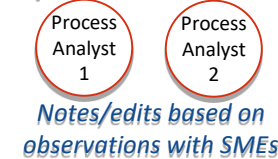


T + 2

Consensus on one standard process:
Consolidated draft to be reviewed & signed-off by T+0 SMEs



Standard Process validated & accepted via a walkthrough

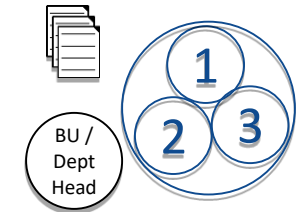


4 - 6 hrs

T + 3

Sign-off:

Final review presented by SMEs to BU/Department Manager



1 - 2 hrs

OUTPUT

Current State
1st Draft

Current State
2nd Draft

Final
Draft

Current State
Final Document

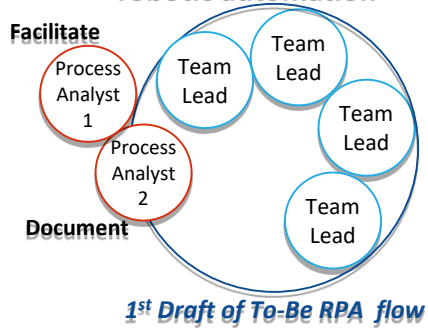
Re-engineering Workshop: To-Be Process Modelling (1/2)

- The purpose of To-Be Process Modelling is to reconfigure or re-engineer or redesign the As-Is process. This ensures efficient and effective utilization of the Digital Workforce powered by Blue Prism's Connected-RPA platform.
- **T+4: Reengineer the As-Is process**
 1. Schedule 2-4 hrs with the Team Leads (and/or SMEs) and bring them in. Process Analysts should identify areas having limited automation feasibility.
 2. Teams Leads and Process Analyst#1 should model a To-Be process model which has high automation feasibility. Process Analyst#2 documents this in a business process mapping tool.
 3. Bring in the RPA COE representative for reviewing the proposed To-Be process model. RPA COE representative should assess the automation feasibility and recommend changes wherever needed.
 4. Process Analyst#2 records the updated To-Be process model in a business process mapping tool.
- **T+5: Agree on To-Be Process**
 1. Block 6-8 hrs with the Team Leads and other staff (including SMEs).
 2. Team Leads and Process Analysts incorporate the changes recommended by RPA COE representative. Expected outcome is RPA COE representative agrees on the To-Be process model.
 3. Team Leads present the proposed To-Be process model to their staff.
 4. Process Analysts finalize the To-Be process model and update the IPA document. Team Leads complete the PDD and review it with Process Analysts.
 5. Team Leads present the final To-Be process model to their management. Expected outcome is a signed-off To-Be process map, IPA and PDD.
- **T+3: Sign-off**
 1. Team Leads present the final To-Be process model to their management. Expected outcome is a signed-off To-Be process map, IPA and PDD.

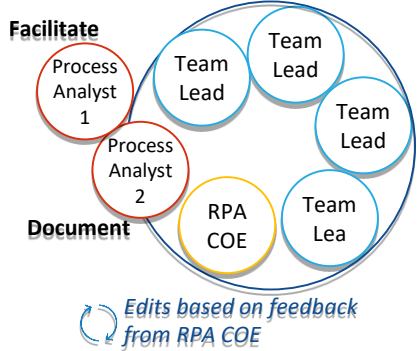
Re-engineering Workshop: To-Be Process Modelling (2/2)

T + 4

Reengineer the As-Is process to utilize robotic automation



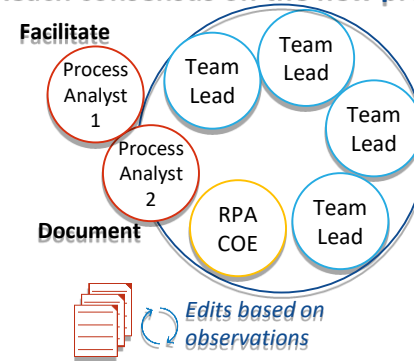
Proposed To-Be RPA flow reviewed with RPA COE



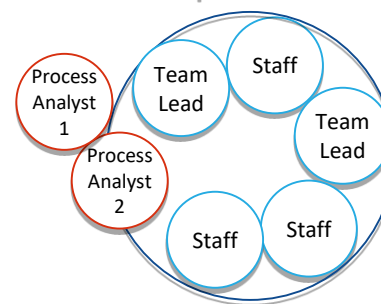
2 - 4 hrs

T + 5

Final Draft reviewed with Team Leads; Reach consensus on the new process



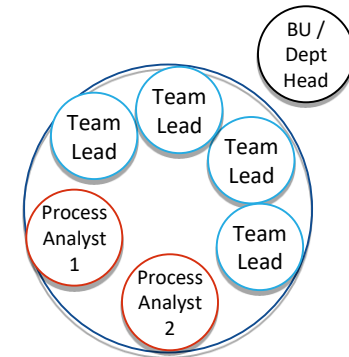
Update IPA and Business Case; Complete PDD



6 - 8 hrs

T + 6

Final review presented by Team Leads to BU/Department Manager



1 - 2 hrs

OUTPUT

Final Draft of To-Be RPA flow

IPA & PDD

Submit final approved document for development



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