



Managing the Digital Workforce

Taking Process Control
to the Next Level



What if your controller didn't just monitor your Digital Workforce?

The Blue Prism Process Controller fulfills a critical role, ensuring that production schedules run smoothly. The Controller may simply act as a human monitor, checking on processes and Digital Workers to ensure they progress as expected and flagging issues when they arise. However, assigning the Controller such a limited task underestimates the value it can deliver.

In this white paper, we will look at additional and alternative responsibilities the Process Controller can adopt to drive greater value and improve efficiency, while also developing new skills. Optimizing the role of Process Controller will strengthen your Robotic Process Automation (RPA) delivery capability and help drive greater value across the organization.

What is a Blue Prism Process Controller?

A Blue Prism Process Controller fulfills a key role that supports and administers the day-to-day process execution in the Blue Prism production environment.

The Process Controller schedules and runs live processes, investigates issues, and raises change requests, incidents and problems, as required. The Process Controller will often be the first to raise an incident related to the platform environment.

The Blue Prism Process Controller delivers:

Environment Monitoring

Daily administration of the Blue Prism live environment (running processes, maintaining resource PCs and viewing logs)

Case Management

Managing and allocating process workloads

Exception Management

Managing and investigating business and systems exceptions

Incident and Problem Management

Solving issues that arise in the daily running of Blue Prism processes and assisting in the provision of timely responses and solutions as required

Continual Service Improvement

Submitting improvements and participating with other users in the Blue Prism community to increase knowledge

Skills:

Blue Prism

Basic Process Studio and Object Studio

Problem Solving

Ability to identify issues and trends and determination to see them through to resolution

Communication

Communicate clearly with business users on operations and Blue Prism on software related issues

Evolution of Control Room Management

The Process Controller is one of the most overlooked and underutilized roles within the Robotic Operating Model (ROM®). Process Controllers can perform far more advanced responsibilities than they are often tasked with, particularly when a Center of Excellence (COE) is first deployed. Increasing the responsibility of this role will make your COE, as well as your processes, more robust, and improve your speed of delivery and scalability.

Below, we will detail additional responsibilities that can be performed by Blue Prism Process Controllers to help optimize the Digital Workforce.

The Robotic Operating Model

Blue Prism has been delivering world-class RPA implementations for nearly two decades.

This hands-on experience has given us real drilled-down, practical knowledge of the RPA delivery process. We've created the ROM to give every Blue Prism user a clear methodology for their automation delivery.

Find out more: www.blueprism.com/rom/

Daily Management

The Process Controller is responsible for the daily management of the production environment. This should not be limited to simply monitoring the Control Room. This role can be expanded to include the following responsibilities:

Resource Management

- Assessing and planning how to best utilize the Digital Workforce, allowing for capacity planning and any planned system maintenance
- Analyzing trends to help forecast resource requirements

SLA Monitoring

Ensuring production processes are meeting service-level agreements (SLAs), flagging any that may be missed and taking the appropriate action

Management Information (MI) Reporting

Producing reports for management, including productivity performance

Stakeholder Management

- Acting as the first point of call for business process owners
- Providing updates on process performance, discussing any changes to the processes, and handling live issues as they arise
- Keeping the process owner informed, including providing status updates

Business Exception Management

Notifying business process owners of any cases that haven't been processed by Blue Prism and ensuring they've been completed

Operational Handbook

Full ownership of the operational support document to ensure it is maintained and remains a dynamic asset

Contingency Planning

Joint ownership with business process owners to ensure any failures do not impact business continuity

Knowledge Sharing

Using Blue Prism Communities and its knowledge base to set up and maintain daily management best practices, as well as sharing knowledge more widely

Credential Management

Providing support for Digital Worker credentials to ensure there are no access issues

Environment Management

Identifying issues within the Blue Prism environment, such as server outages, and flagging with the appropriate teams for resolution

Archiving

Archiving session logs and ensuring the correct level of logging is deployed into production as part of the acceptance into service process

Project Support and Change Management

Each build or project that is initiated should be allocated an analyst, a developer and a Process Controller. The Controller's role is to become a business subject matter expert in the process. Example responsibilities may include:

Impact Assessment

Engage with system owners to understand the impact of system changes on production processes and with business owners to understand the impact of business process changes. Once complete, the Process Controller schedules solution changes with the development team.

Documentation

Support the documentation of the 'as is' and 'to be' process.

Define/Design/Test

Take an active role in the 'define/design/test' cycle.

Validation

Support the testing validation in the project lifecycle.

Go/No-go

Provide acceptance for the process into production.

Post Implementation Review

Perform the post implementation review for production releases.

Gate Review

Act as a gateway to production, and confirm release requirements are met.

Import

Import releases into production, and confirm completion.

**It should be noted that any remediation work performed by a Process Controller should be managed in line with the organization's access controls and policies.*

Live Issue Management

Ensuring the Digital Workforce is operating as expected and restoring service, should any issues arise, is a fundamental responsibility of the Process Controller. Equally, the Process Controller is well-placed to identify repeat problems and make recommendations to both the development team and the business to optimize the performance of all processes in the schedule. Example responsibilities may include:

Incident Management

In the case of process failures, ensure the process is restored and running in line with the business continuity plan.

Hot Fixes*

Create and manage the 'Hot Fix' process.

Live issue development*

Execute small developments to resolve incidents or problems in order to free up developer time. Then, build in a non-production environment and only release it to production once it has been peer reviewed by a developer.

Incident Redress Management*

Resolve issues related to the process automation build. The Process Controller manages the redress of any customer data or cases, including communication with the customer contact as required.

Incident Review

Investigate and make change recommendations for production issues. Such work should be performed only within a test/development/UAT environment, not directly in production.

Production Access

Enable monitored and auditable 'four-eyes' access to the production environment for the development team, where required, to understand change requirements.

Problem Solving

Use Blue Prism Communities its and knowledge base to enable problem solving.

Process Efficiency

Blue Prism Process Controllers have the best visibility into the way processes are performing in production, as well as prolonged exposure to the schedule. This means that Process Controllers can play a fundamental role in driving continual service improvement within an RPA service. Example responsibilities may include:

Proactive Problem Management

Perform trend analysis to identify repeat problems and making recommendations for resolution.

Automation Enhancement

Suggest and drive improvements to processes in production to decrease exception rates and improve performance or utilization.

MI Optimization

Drive an improved MI solution to reduce Controller monitoring, improve performance visibility and increase business ownership.

Enhancement Management

Work with the development team to build and test process enhancements.

Testing and Validation

As a guardian of the production environment, the Process Controller should play a critical role in testing processes before they are formally released. Example responsibilities may include:

Test Plans

Support the analyst with documenting test plans. The analyst remains responsible for the plan, but the Process Controller provides input.

User Acceptance Testing

Support User Acceptance Testing (UAT) for each automation.

Regression Testing

Perform regression testing to ensure delivery does not impact other processes.

Core Platform

Assist with UAT and regression testing for core platform release cycles.

Response Planning

Participate in business continuity and disaster recovery testing.

Release Monitoring

Manage release and roll-out monitoring.

Hypercare

Manage the warranty/hypercare period.



How the Process Controller Role May Evolve

As customers progress on their Blue Prism journey, they pass through three distinct phases of maturity. We refer to these as the Enterprise RPA Maturity Model. Just as an RPA capability evolves through a maturity model, so too should the roles within the COE. The description below is illustrative and not restrictive; different organizations will progress at different rates.

The Process Controller through the Maturity Model

Initialize

Establish Capability

- Process Controllers deployed, potentially as a function of the Developer role
- Basic Controller training provided
- Core tasks of scheduling and monitoring

Industrialize

Replicate and Ramp-Up

- Process Controllers deployed as a stand-alone function where possible
- Expanded responsibilities, including break-fixes, problem management and reporting

Institutionalize

Deliver Differentiated Performance

- Process Controllers deployed as a stand-alone function
- Controllers are certified developers
- Expanded responsibilities, including automating elements of control, change work and extended support

Initialize Phase

Customers start in the initialize phase. Here they establish their initial capability and start building automations, normally by starting with a central COE. The people brought together here will lay the foundation for future phases. They will define the vision for RPA in the organization and set the standard for delivery. Those involved in this phase become the evangelists for RPA across the organization. How does the Process Controller fit into this phase?

Organization

Employ the Process Controllers, including providing controller training.

Business Benefit

Processes are monitored and maintained, providing the business with confidence in RPA via a basic support model.

Capability

- Monitor processes
- Operate processes
- Manage Blue Prism sessions
- Manage Blue Prism schedules
- Provide daily Blue Prism status and health check reports
- Provide Tier 1 support

Industrialize Phase

Next, businesses move into the industrialize phase. This phase is where they begin to ramp up their Digital Workforce. There is no “one-size-fits-all” approach to how organizations do this. There are several options. Some will retain their Center of Excellence. Others will merge with other business areas, while still maintaining governance and best practices. Others may adopt a hybrid of these approaches. There is no right or wrong way to do this, as all organizations are different. How does the Process Controller fit into this phase?

Organization

Provide the Process Controllers with controller and developer training, as well as an understanding of the underlying infrastructure and platform architecture.

Business Benefit

- Digital Workforce performance tracking and reporting
- Utilization and benefits tracking
- Faster resolution of incidents
- Improved feedback loop for continual service improvement

Capability

The following are additions to the established initialized capabilities:

- Automate process monitoring
- Provide support communications back to the business
- Provide Tier 2 support
- Apply hot fix to broken processes
- Problem solve using Blue Prism Communities and knowledge base
- Provide feedback at retrospectives

Institutionalize Phase

The last phase of the maturity model is where Blue Prism becomes institutionalized within the organization. At this point, it is “business as usual” for those within the enterprise and the digital workforce is fully embedded. They will have the skills, capability and capacity to fully exploit the technology in achieving their overall business objectives. RPA will be fully integrated into the organization’s way of working and cultural DNA. How does the Process Controller fit into this phase?

Organization

Process Controllers will have obtained their Blue Prism Developer accreditation and may hold the Blue Prism Technical Architect qualification. Many organizations progress Process Controllers into developer roles as part of their RPA career pathway.

Business Benefit

- Digital Workforce performance improvement insights
- Utilization maximization
- Benefits maximization

Capability

The following are additions to the established initialized capabilities:

- Cover all business processing hours
- Provide continuous improvement recommendations for support
- Provide support communications back to the business
- Provide Tier 3 support
- Perform change requests
- Establish feedback loops back to the developers

Conclusion

As an RPA team, your overall objective is to maximize the capabilities of a Digital Workforce within your existing organization. This ethos should extend to the Process Controller role. Controllers can deliver far greater value within an RPA team than may be initially considered. In addition to performing additional tasks as described in this document, Controllers also play a key role in continual service improvement, enabling Digital Workers to operate at the highest level of efficiency. The opportunities to add value in this area are vast, and as organizations scale their Digital Workforce, they should also look to maximize the capabilities of their Process Controllers.



About Blue Prism

Blue Prism's vision is to provide a Digital Workforce for Every Enterprise. The company's purpose is to unleash the collaborative potential of humans, operating in harmony with a Digital Workforce, so every enterprise can exceed their business goals and drive meaningful growth, with unmatched speed and agility.

Fortune 500 and public-sector organizations, among customers across 70 commercial sectors, trust Blue Prism's enterprise-grade connected-RPA platform, which has users in more than 170 countries. By strategically applying intelligent automation, these organizations are creating new opportunities and services, while unlocking massive efficiencies that return millions of hours of work back into their business.

Available on-premises, in the cloud, hybrid, or as an integrated SaaS solution, Blue Prism's Digital Workforce automates ever more complex, end-to-end processes that drive a true digital transformation, collaboratively, at scale and across the entire enterprise.

Visit www.blueprism.com to learn more or follow Blue Prism on Twitter @blue_prism and on LinkedIn.