<Process name>

## Contact Details

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## Process Requirement

Provide a high-level overview of the business requirement.

## Proposed Blue Prism Solution

Provide a high-level description of how the business requirement will be met using Blue Prism.

## Prerequisites

* Detailed process documentation outlining each of the step-by-step procedures is required.
* A suitable IT development environment as defined in the project initiation phase and access to the in scope systems is required

## Assumptions

* Suitably skilled Subject Matter Experts (SMEs) will be available to support the delivery of this process automation

## Estimates

### Delivery

The following estimate includes analysis, design, documentation, configuration, test and go-live support.

* Option 1 – x days
* Option 2 – y days

### Production

Controller – it is estimated that this process can be absorbed into the existing process controller resource workload / it is estimated that an additional process controller will be required to run this process in production / a new controller team is required to run this process / other

Maintenance – due to the propensity for the underlying systems and/or business rules to change it is estimated that the business as usual maintenance activity on this process will equate to x days per year / as the underlying systems and business rules are static, it is estimated that the business as usual maintenance activity on this process will equate to x days per year / other

## Case Volumes and Process Metrics

List existing or predicted key metrics about volume or expected throughput.

(Include Unit times per major scenario type, volumes by major scenario type, deadlines or SLAs which affect operation, variance in daily volumes.)

## Business Benefit Categories

Describe the benefits, as quantified by the customer.

(E.g. FTE saving, data quality improvement, increased customer experience, compliance etc. - Requestor to quantify, Blue Prism to support quantification activity if required)

## Exceptions and Referrals

It is expected that the initial Business Referral level (i.e. process actions that are to be referred by the Blue Prism process to the Operational Department for manual input and therefore not expected to be automatically processed end to end) is estimated to be in the range of x – y %. This range estimate assumes that only ‘in scope’ cases will be passed to Blue Prism for processing and will be reviewed throughout the project design and delivery phase.

The level of Host System Exceptions (i.e. cases where unexpected host system events are encountered) is expected to be in the range of x – y % when the process is initially made operational. This range estimate will be reviewed and refined during the project design and delivery phase.

## Environment Considerations

A secure, resilient and controlled IT platform is required for the delivery of automated processes through Blue Prism. An Infrastructure Guide and a Hardware Specification Guidelines document are available to support the definition and creation of this platform.

Blue Prism Professional Services will work with the customer during Project Initiation to instigate the activities required to implement this platform.

The number of virtual desktops required for this process is assumed to equate to half the number of FTE currently working the process. This number will be reviewed and refined during the next phases of the project.

# Initial Process Analysis Summary

## Key Factor Assessment

The following factors were assessed as part of the data gathering exercise for this Initial Process Analysis. Each item is rated on the following scale:

1. Reduce the exception levels, size or estimate range

2. Average exception level (5-15%), size (20-30 days) or estimate range (10 days)

3. Increase the exception levels or estimate range

|  |  |  |  |
| --- | --- | --- | --- |
| Factor | Rating | Comment | Impact Area |
| **Business Process Definition** | **1** | **Detailed, documented process descriptions exist and have been witnessed. The quality of the documentation will be assessed during the Client Site Investigation** | **Exception levels** |
| Subject Matter Expert | 1 | The SME has good knowledge of the documented process and will be made available to support the project | Exception levels |
| **Process Complexity** | **2** | **The business process accesses only one or two applications and has average formulae** | **Estimate size** |
| Host Application Technology | 2 | Java and Windows | Host Application Technology |
| **Re-use of existing components** | **3** | **No components exist** | **Estimate size** |
| Test Data Availability | 2 | The test environment is an exact replica of live | Estimate range |
| **Hardware Availability and Security Approval** | **3** | **Hardware and security strategy unclear at this time** | **Estimate range** |
| <Add additional factors as required> | etc | Etc | Etc |

### NOTES:

A score of 3 in any in any of the categories highlighted in Bold should trigger the activities required to produce a Refined Process Analysis (RPA).

### RATINGS AND SAMPLE WORDING

#### Business Process Definition Rating:

* 1 – Detailed, documented process descriptions exist and have been witnessed. The quality of the documentation will be assessed during the next phases of the project
* 2 – High level process descriptions exist and have been witnessed. The quality of the overviews will be assessed during the net phases of the project
* 3 – No material process documentation exists. A Business Process Walkthrough is required in order that a Refined Process Analysis can be produced.

#### Subject Matter Expert: -

* 1 – the SME has good knowledge of the documented process and will be made available to support the project
* 2 – the SME has limited knowledge of the documented process OR the SME has reasonable knowledge of the process but will have only limited availability to support the project
* 3– no SME identified with sufficient knowledge of the detailed process

#### Process Complexity:

* 1 – the business process access has an small Average Unit Time and/or process involves single queue transaction and/or process does not update business critical data and/or no changes required to end to end business process.
* 2 – the business process access has an reasonable Average Unit Time and/or process involves a couple of queue transactions and/or process updates some business critical data late in the process and/or minor changes required to end to end business process.
* 3 – the business process access has an high Average Unit Time and/or process involves multiple queue transactions and/or process updates business critical data throughout the cycle and/or significant changes required to end to end business process. A Business Process Walkthrough is required in order that a Refined Process Analysis can be produced.

#### Host Application Technology:

* 1 – HTML, Windows or Mainframe
* 2 – Java
* 3 – Citrix etc, (An Application Assessment is required in order that a Refined Process Analysis can be produced.

#### Re-use of Existing Components

* 1 – The majority of the components required already exist in production
* 2 – Some of the components required already exist in production
* 3 – None of the components already exist

#### Test data availability

* 1 – Test cases are available in the live environment and/or client approves use of production cases for controlled testing.
* 2 – A test environment exists that is an exact mirror of the live environment and the environment is readily available for BP use.
* 3 – The client has no appropriate test environment and cases in the live environment cannot be used for controlled testing or the test approach has not yet been defined.

#### Hardware Availability and Security Approval

* 1 – The IT team have been engaged and are able to provide the required hardware infrastructure with minimal Blue Prism team involvement. The security team have provisionally approved the approach subject to confirmation during the delivery project.
* 2 – Initial conversations have taken place with IT but the path to creating the required hardware infrastructure is not defined.
* 3 – The hardware infrastructure will be difficult to source and/or the security team have raised concerns over the approach. OR – the IT and/or Security teams have not yet been engaged.

### NOTES:

#### Business Process Walkthrough

A Business Process Walkthrough requires a Blue Prism consultant sitting with a SME to see the process being walked through manually. All available Process Documentation should be provided in advance of this face to face meeting.

#### Application Assessment

Where the IPA has identified new or complex technology in the host systems, an Application Assessment will be undertaken – this requires that the Blue Prism product is installed on a client desktop with access to the appropriate host system(s)/

#### Client Site

A Client Site Investigation will be undertaken for all new and prospective Blue Prism clients – the Client Site Investigation incorporates a Business Process Walkthrough and an Application Assessment.

## Reference Training

The following guidelines will help complete training for this delivery documentation.

|  |  |
| --- | --- |
| Title | Description |
| Lifecycle Orientation | This is a Blue Prism portal page, providing a brief explanation of the Blue Prism Lifecycle Orientation and related documents.  Blue Prism portal path: Home> Learning> Lifecycle Orientation |
| Delivery Roadmap | This document describes the end-to-end steps in creating and delivering a Blue Prism process solution. The key process phases are outlined from Initial Process Assessment through to Testing.  Blue Prism portal path: Home> Documents |
| Lifecycle Orientation Sample Delivery Documents | All prescribed delivery documents are fully completed. These are referenced within the Delivery Roadmap and provide an example of the content and level of detail required.  Blue Prism portal path: Home> Documents |
| Process Delivery Methodology | The Blue Prism Process Delivery Methodology is a proven means of delivering ongoing business benefit through process automation using a controlled and structured Automation Framework.  Blue Prism portal path: Home> Documents |