

The A-Z of Organizational Digital Transformation

A Line of Business Manager's Practical, No B.S. Guide

Kieran Gilmurray

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Introduction by Kieran Gilmurray: How To Read This A-Z



I bet you already know how to read a book. You look at the cover; you examine the back. You might scan the chapter headings, glance at the opening paragraph. If a technical or business book, you may even look at the index.

Well, this book *can* be read sequentially, but you may see some core concepts crop up more than once—which is legitimate for the task at hand. You might be better served by dipping in and out. That’s because what you're holding in your hand is a user manual designed to help the non-specialist line-of-business manager intrigued and inspired by all the current talk of process automation (RPA), data analytics (DA), intelligent automation (IA) tooling and digital transformation (DT)—and who wants to see how they can start building competence and go digital in their own organizations.

The guide is made up of 26 ('A' to 'Z') separate chapters covering ranges of categories of digital transformation concepts, best practice, and commonly used terms. These are interspersed with a few real-world examples of success from our sponsor, Virtual Operations, Ltd, as well as from several standalone explainers on things like building great intelligent automation business cases, and what are the ideal skills you should be sourcing from the market.

If you're such a business professional, you've probably heard that digital transformation—the exploitation of digital-speed efficiencies to speed up your business—can lower costs and raise your profile to digital-savvy customers, these benefits—which are real—don't come just from flipping a switch on a software robot or two in your accounts payable department.

The reality is there's a big margin for error here. Wasted costs from a poorly imagined or implemented digital transformation program can be significant. The implications of RPA projects that crash and burn for organizations, colleagues and customers can be big. According to a 2019 study by consultancy EY, 30% to 50% of RPA implementations fail. Commentators looking at why say a lack of understanding about what these amazing things are and can really do is a big factor.

I wrote this book to try and stop that happening. What I want to do is make it easier for people like you to make sense of what this techie alphabet soup of RPA, IA, DA and DT really mean for a business. Written to help clear some of the fog, it's the result of my own years of experience helping customers like you achieve real long-lasting positive results with IT. That's been augmented and deepened by significant input from practitioners with decades of real-world experience of what has worked for them, and what's not.

So read this as an A-Z of all you need to know—or at least, to get the basics and find out more. To help, there's an accompanying digital resource, www.whatisroboticprocessautomation.com, where links and more guidance is a click away (and which will be constantly updated).

Perhaps a bit about me: for almost three decades, I have helped businesses like yours and leaders like you drive business and technology transformation programs using digital technologies at small, medium, international, and global organizations. My mission is to help 100,000 businesses make an impact on society through technology.

I have worked in the education, technology, insurance, consulting, health / wealth / benefits, charity, and cyber security industries. And I am truly passionate (an over-used word, but still with meaning for me) about technology and how it can help

business and society transform. Touch wood, my work has generated substantive value for businesses like yours, and for leaders just like you: hopefully, this book will help you move forward and do the same.

I'd also like to thank all the many practitioners, experts and trusted colleagues who have contributed some of their hard-won digital transformation expertise. I would especially like to take this opportunity to thank Nick Andrews, Executive Chairman of Virtual Operations for his kind sponsorship: without Nick's encouragement and support, this practitioner's user manual would not be in your hands.

I hope that this A-Z will help you and your business become more successful using these wonderful technologies however you choose to read it!

PS And keep your eyes peeled on www.whatisroboticprocessautomation.com!

May 2022

Belfast, Northern Ireland, UK

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Foreword by Francis Carden

When you hear the term ‘digital transformation,’ do you yawn or sit up, interested?

At some point, you’ve probably done both. Maybe you’ve got some digital fatigue. Worse, some scar tissue.

But that doesn’t stop the reality that becoming a digitally transformed enterprise is now one we all aspire to be part of.

So, I was excited to hear about this new book from my friend, Kieran Gilmurray. Why: over the years we’ve worked, argued, and been helping others get something out of the tech they’ve invested in. And when he told me he was writing a book about digital enablement that wasn’t a marketing brochure but a true A-Z, I couldn’t wait to see it.

The result—what you have now in your hands—is not a book of how to get there, but also full of useful, pragmatic warnings about the roadblocks you will see along the way. Don’t wait to learn the hard way. Read *The A-Z of Organizational Digital Transformation* instead... it’s going to save you a lot of money on paracetamol.

My own journey into how tech and business can really help when it’s done right started over 40 years ago. The way we “computerised” business processes back then then was constrained by so many things: poor hardware, limited database and programming language choice, absurdly primitive networking over slow, slow, slow coaxial cable, laughable storage, and very low overall computing power.

Even so, for all these limitations, these technologies still impacted every part of our society and lives. That’s because they helped business, pure and simple. But now, we are in a new digital era; we are no longer constrained by such things. Amazing, feature-rich enterprise applications can now be built without code, without defining a database, without wires or physical locations, without knowing what hardware it might run on or even without deciding on what device it might run on until the day we turn it on.

That means you are in a perfect place to use all this power to optimise for success and efficiency at your organization. The digital era is instead about realizing where you want to go. Some call it the second machine age, intelligent automation, hyper automation, digital process automation... fine. Whatever you call it, you **NEED** to be doing it.

So: be bold. Be Brave. Now is your time. Go with Kieran on this journey. In fact, like any good A-Z, you can start anywhere. But key is knowing the best paths and how to avoid the bumpy ones that lead you nowhere.

I think you'll find it's a journey worth taking.

And my promise to is that if you have ever envied another enterprize, be it a digital native start-up or a competitor that has successfully digitally transformed, then I believe the book you now have in your hand will put you on the road to being the one *they* envy.

Francis Carden

VP, Intelligent Automation and Robotics

Pegasystems

St Petersburg, Florida

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A - is for Accessible (Tools and Code) | Accountability | Agile | Attended RPA | APIs | Artificial Intelligence

Welcome to the first in our 26 chapters on the A to Z of robotic process automation (RPA), intelligent automation (IA), data analytics (DA) and digital transformation (DT). This chapter highlights all the best practice relating these topics that start with the letter 'A'.

Accessible Tools and Code: How easily your developers and / or your citizen developers can code is key to your truly expanding RPA | IA across your organization. The more accessible your intelligent automation tools are, the easier it is to build intelligent process automation, and thus the more likely RPA | IA is to scale (and scale affordably).

RPA | IA tools need to be as available and accessible as, for example, Microsoft Excel is on your organization's work desktops.

Whilst RPA | AI builds do need to follow strict organizational standards before distribution, the tools themselves need to be ubiquitous, and not the preserve of your IT team if your business is to gain digital transformation traction.

Accountability: Everyone in the organization should be trained, communicated with, then their progress in meeting the organization's goals tracked. This responsibility falls on the shoulders of the CEO and overall leadership team. To deliver on the benefits of an intelligent automation and digital transformation teams, need:

- precision guided metrics
- agile ways of working; access to digital tools and training
- insights into customer behaviour
- clearly defined digitally enabled business outcomes
- coaching
- comprehensive change plans
- and creative freedom

All these need to be simultaneously coordinated so that organization goals can be delivered.

It is incumbent on the CEO and executive team to hold themselves accountable for creating the right digitally enabled vision and environment, then communicating that to the business.

Without executive direction and leadership, digital transformation programs often struggle to gain train. Seek executive support before you begin, then fight to deliver results to retain that support.

Gourav Datta, RPA and Intelligent Automation Delivery Lead, Ciklum

Agile: Agile is a collection of 12 principles used in software development and project management. Agile teams focus on delivering value to their customers in small increments. Business requirements, project plans, and program deliverables are continuously evaluated and responded to. This helps Agile teams respond to changes in business requirements in a quick manner.

Robotic process automation offers a fast, 'agile' solution to both experienced (think seasoned C# or Python coders) and inexperienced coders (think subject matter expert citizen developers). There is no longer a need to spend months coding line after line of complex code when attempting to pass data into, out of, or between computer applications. Instead, RPA can be used to deliver software solutions almost as quickly as business requirements change.

Organizations thinking of implementing an RPA / IA platform should implement Agile ways of working, Design Thinking and Lean Digital. Just because you have implemented Agile teams does not mean you have overnight become a digital business; however, a combination of Agile development approaches, design thinking and lean for digital practices does allow an organization to rapidly re-imagine the way it captures and delivers customer value in ways better suited to the digital age.

Create a methodology and set strict reviews around it. The art is keeping it simple; any idiot can make this difficult and leave a solution that is impossible to maintain.

Gavin Price, Co-Founder, Automation Outcomes Limited

Attended RPA: Robotic process automation platforms come in a variety of flavours. You need to decide whether attended, unattended or hybrid is right for your organization, and select accordingly.

Understand that different RPA tools are better for different purposes. Many of the large RPA vendors are well suited to unattended automation in back-office environments. Most will also claim to have attended automation solution as well – although interpretation of what is meant by attended

automation can differ within the market. However, think carefully about selecting a tool to operate in a truly real-time setting e.g., a call center. Whilst some forms of attended automation might be suitable for some call-center type operations, you may be better suited exploring options with specialist automation offerings focused on call centers.

Darren Mee, Founder at The New Way Consulting

So, choose your RPA approach carefully: don't ignore an unattended automation product that might be better suited to your needs 'just in case' things change later. For example, unattended automation products can be extended to become more like attended products via 3rd-party tools, clever coding, and robot monitoring.

Great automation products aren't defined as attended or unattended; they allow integration and collaboration between human and machine and make it simple for you to choose how and when to automate.

Paul Arnold, Head of Product and Development, Cortex Intelligent Automation

APIs (Application Program Interfaces): When considering an application as a candidate for intelligent automation, check with the application team to determine whether an API exists—or if an API needs to be created, and what the cost might be. Most modern applications offer APIs, which offers a somewhat more resilient approach to automating interactions between applications in comparison to RPA. You might still wish to use an RPA tool to orchestrate between applications; however—depending on the process, or application—you can often gain greater reliability and speed by using an API instead.

Artificial Intelligence: To scale and digitally transform, an organization needs more than simple task execution software such as RPA. When infused with AI, bots can see patterns and identify issues as, if not more, accurately than people.

In many ways, RPA in isolation is dying out. It was the first iteration, usurped by intelligent process automation, which is infinitely more powerful. There will no doubt be many more iterations along the way, but utilization of machine learning and artificial intelligence, may well be the most impactful.

Edward Halsey, COO, Hubb Insurance

Integrating an organization's RPA platform with AI extends the digital capabilities of an organization's digital workforce. For example, Optical Character Recognition (OCR) with an AI component allows an organization to 'read' documents, implementing Natural Language Programming (NLP) allows an organization to 'listen', and implementing Machine Learning (ML) allows an organization to learn.

