



# RPA Bible:

Your comprehensive guide to  
Robotic Process Automation  
and how it can benefit  
your organisation

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# Contents

Introduction	3
What is RPA?	5
Process automation vs cognitive automation	7
Attended vs unattended RPA	13
What has driven the recent growth in RPA?	17
RPA use cases	19
Five essential RPA questions for your organisation	27
How automation affects workplace culture	34
RPA evaluation process	39

# Introduction

Robotic Process Automation (RPA) has grown in both its application and adoption across the tech landscape. As the global network of platforms, systems and devices connect and share information to ensure seamless customer experiences, automation has never been more important.

Just one simple online transaction can be supported by numerous automated bots:

- Online payment is completed
- Customer data is collected
- The order is processed
- Stock levels are checked and replenished
- Order tracking notifications are sent to the customer

These applications are just the tip of the iceberg for retail applications of RPA technology, not to mention its use in fields such as finance, legal, insurance, HR, healthcare and the wider public sector.

The buzz around RPA and its benefits is exciting but it can lead to organisations rushing their adoption of automation tools. Vendors advertise massive returns before learning the first thing about your company’s ambitions, projects, and tech capabilities. Far too often, we’ve spoken with tech leaders who have shelved their RPA initiatives because they haven’t been implemented efficiently, or they aren’t properly aligned to their organisation’s goals.

That’s why we’ve created this RPA Bible. This is your one-stop resource for learning about RPA, finding opportunities to apply it to your business, and evaluating your organisational readiness to implement automation.

*We hope you enjoy reading about the many variations and possibilities available in the world of RPA and you find new applications to take your teams, projects and businesses to the next level.*

- TEN10

# What is RPA?

## What is RPA?

RPA software automates repetitive, rules-based processes usually performed by people sitting in front of computers. By interacting with applications just as a human would, software robots can open email attachments, complete e-forms, record and re-key data, and perform other tasks that mimic human action.



### Automation at the User Interface layer:

software 'bots' are programs that simulate human activity, therefore no changes are required to the underlying infrastructure or systems



### Automation of the Knowledge Worker:

automated 'bots' to execute tasks that would otherwise require manual operation



### Automation of time consuming, repetitive or mundane tasks:

typically don't require the knowledge workers' specialised expertise and decision making

# Process Automation VS Cognitive Automation

## Process automation vs cognitive automation

### What is process automation?

Process automation could be better described as 'traditional' RPA. It allows for the automation of repetitive, structured, and logical tasks quickly and effectively. Some other key characteristics include:

- Structured data
- High stability and consistency, low variability
- Simple and rules-based, low complexity
- High volumes
- Digital inputs

Essentially, process automation brings speed, accuracy and precision to time-consuming, 'mundane' tasks that typically don't require the human user's specialised expertise and decision-making.

### Use case examples for process automation

- Finance: invoice and expense processing
- HR: joiners, movers, leavers
- Technology: data migration, data cleansing, password unlock and reset
- Contact centres: one customer view, updating customer profiles, customer complaints
- Operations: customer onboarding, account opening, renewals, account closing, change of address

## What is cognitive automation?

Cognitive automation refers to the use of elements of artificial intelligence (AI) to enhance process RPA, allowing the tools to make 'judgements' and increasing the ability to automate business process steps that require specialised expertise and decision-making.

### Characteristics of cognitive automation include:

- Situational and decision-oriented tasks
- Unstructured data
- Machine learning – training based on analysis of historical and ongoing data
- Decisions made by Bots or escalated for human input (and further training)

### Use case examples for cognitive automation

- Mismatches between contracts and invoices
- Chatbots
- Banking: customer screening
- Insurance: assess the impact of policy changes
- Insurance: make automated claims decisions

## How is AI used in cognitive automation?

When we refer to AI in the context of cognitive automation, we are referring to the three elements that allow RPA tools to understand data and extract actionable information. These are:

### Natural language processing (NLP):

The ability to understand text and spoken words in a way that mimics human understanding, then reply in a similar fashion. A clear example of this in action is an organisation's chatbot that analyses customer questions and requests then serves appropriate replies.

### Intelligent optical character recognition (OCR):

Industries subject to heavy regulation, such as legal, finance, and healthcare, require accurate character recognition when paper documents are processed. This is a key element of automating historically manual processes such as contract review.

### Machine Learning (ML):

As the previous two elements take care of 'understanding' unstructured data, Machine Learning is the decision-making element that puts that data into action. This 'machine judgement' replaces human judgement when processes require decisions to be made.

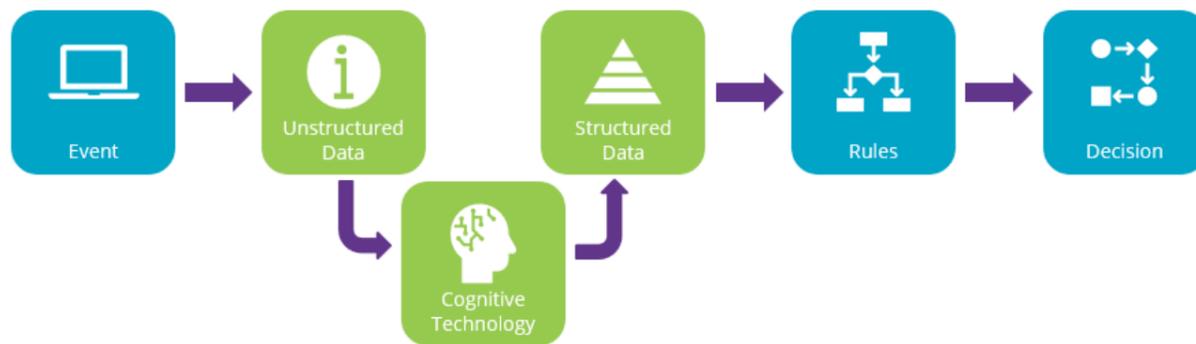
Whilst cognitive automation will never replace the need for human input in all scenarios to resolve highly complex conditions, it allows for the scope of automation in organisations to take a few steps further.

You can see a direct comparison between process and cognitive automation in the flowcharts below:

Conventional bots



Cognitive bots



## When should you use cognitive automation?

The hype around cognitive automation can unfortunately often inspire too much initial confidence and scope in some organisations' RPA pilot projects. Often, this is not down to failures in the cognitive technology itself, but rather the failure of organisations to fully appreciate the complexities and risks of implementing it.

The phrase 'don't run before you can walk' is appropriate in the context of cognitive automation.

The ultimate success of RPA in many organisations is based on early-stage successes and confidence, providing the levels of adoption, interest (crucially across both business and IT stakeholders) and budgets that require further investment at each stage. Many organisations rush into using cognitive automation and experience limited success with significant cost. This means that adoption is low, funding for ongoing maintenance and support isn't forthcoming, and confidence investing further quickly erodes. RPA therefore often ends up 'on the shelf.'

When you are exploring automation opportunities in your organisation, clear 'quick wins' will be available in the form of process automation. If these are implemented well and with appropriate stakeholder buy-in, they can have significant cost, speed, and efficiency benefits. This in turn establishes confidence and allows the business case to move to the next stages and levels of adoption, during which cognitive automation will become increasingly relevant.

In most scenarios, an effective combination of process and cognitive automation, often referred to as 'Intelligent Automation' will lead to the most effective optimisation of manual processes and thus yield the highest return on investment.

# Attended vs unattended RPA

## Attended vs unattended RPA

Just as automated processes can be categorised as process and cognitive automation, they can be further categorised as attended or unattended depending on how they are triggered and where they run from. But it isn't always a case of 'attended vs unattended RPA'.

Knowing the differences between them and when they should be used is the first step to exploring automation opportunities in your organisation.

### What is attended RPA?

Attended bots run on a user's workstation and are triggered by user actions. They automate small repetitive, tedious tasks to increase speed and efficiency and are sometimes known as personal assistant bots or virtual assistants. Attended bots are often simpler to create and implement and offer the potential to deliver rapid business value.

### When should you use attended RPA?

Because attended RPA is activated by employees when it is needed, it can be applied to a variety of workplace tasks. This includes:

- Finance: Processing invoices
- Healthcare/Insurance: Claims processing and documentation
- HR: Employee onboarding
- Legal: Credential verification
- Retail: Inventory management

## Advantages of attended RPA

- Increased staff efficiency
- Increased staff job satisfaction
- Minimal setup
- Rapid ROI

## What is unattended RPA?

Unattended bots on the other hand run on servers behind the scenes with little or no human intervention. They're built to be run on pre-determined schedules or workflow triggers and can be used to automate wider back-office functions and processes at scale. This often allows for wider business processes optimisation and efficiency gains. As a result, unattended processes can be more complex and costly to implement and maintain, but often have the potential for greater return on investment over the course of their life.

## When should you use unattended RPA?

Because unattended RPA operates on a schedule (or when triggered in a workflow) it can be used to automate a range of back-office functions. This includes:

- **Customer Support:** Chatbots
- **Finance:** Document comparison (e.g. contract vs invoice paid)
- **Finance/Legal/Healthcare:** Managing sensitive information
- **HR:** Candidate screening
- **IT:** System monitoring
- **All:** Data cleanup

## Advantages of unattended RPA

- Can be accessed remotely
- Reduces operating costs
- Uninterrupted automation for 'always on' industries (e.g. healthcare, telecommunications, finance)
- Larger potential ROI

## Can attended and unattended RPA be used together?

Utilising RPA doesn't have to be a case of choosing between attended and unattended automation. It's important to recognise that both forms can be leveraged as part of your RPA strategy.

Attended automation increases the speed, efficiency and capabilities of desktop knowledge workers and unattended automation helps streamline and scale back office, enterprise functions and workflows.

Take time and consider the tasks and processes in your business that could be automated. Rather than thinking of it as a binary choice - attended vs unattended RPA - consider how they can be used together. Which workplace tasks lend themselves to attended automation, which back-office processes are suitable for unattended automation, and when can a workflow utilise both?

# What has driven the recent growth in RPA?

## What has driven the recent growth in RPA?

Investment in and adoption of RPA technology is increasing, and we want to give you a clear picture of why.

At least some of RPA's growth can be attributed to hype and marketing, particularly from vendors who are all too happy to market RPA as a 'wonder solution' that is suitable to any situation. But it is also true that, as the technology has evolved, organisations are able to find new and exciting ways to utilise RPA and make improvements.

Here are the key drivers and benefits of automation that have contributed towards its recent growth:

- RPA can be a non-intrusive technology, offering lower risk digital transformation compared to much larger platform or infrastructure changes. Bots also sit within existing security domains and controls.
- RPA can lead to reduced costs by offering greater value from employees and in some cases, a reduced headcount. It should be noted that in our experience, RPA is better when used to augment existing staff workforces rather than replace staff members.
- RPA tools can be used as effective forms of legacy reinvigoration, mitigating 'spaghetti code' and manual workarounds.
- RPA can offer easier change management by deploying on top of existing platforms rather than replacing them.
- Bots offer consistency, accuracy, speed, and efficiency as they will only follow a pre-defined course and won't make mistakes when built correct.
- Technological advances are leading to more effective solutions, particularly with artificial intelligence and cheaper infrastructure.
- Bots are highly scalable and can operate 24/7, 365 days a year.
- Improved audit as bot logs can be stored and reviewed when required.
- As bots follow a programmed path, they're ideal for processes with a high amount of regulatory compliance.
- The automation of tedious, repetitive processes allows your staff to be redeployed to perform more meaningful tasks with higher job satisfaction.
- Finally, the use of bots allows for better standardisation. A single, well-defined process performed by bots is highly traceable and will be documented thoroughly during RPA analysis.

# RPA

## use cases

## RPA use cases

Every year, more businesses are using Robotic Process Automation to streamline workflows and free up more of their staff's time. By automating repetitive tasks like data transference and report compilation, people have more time to innovate, collaborate, and think strategically about their projects. The benefits of RPA are clear. What isn't as clear is how you can apply it to your business.

You may read case studies or news reports about how other businesses have applied RPA, but every company's system architecture is different. What tasks in your company could be automated? And if RPA is so powerful and transformative, where should you apply it inside your organisation?

We created the Periodic Table of RPA to help you find opportunities to apply the technology in your own business. Whether you're completely new to RPA or you've already implemented it in your business and want to make the most of the technology, we've identified 74 tasks that are ripe for improvement with the help of RPA.

## Multi-purpose tasks

- Competitive Pricing and Monitoring
- Customer Due Diligence
- Customer Data Management
- Customer Engagement Communications
- Compliance Reporting
- Sales and Purchase Order Processing
- Refunds and Returns

These tasks should be your first considerations for RPA application. Many tasks have cross-departmental applications, but we've found these are the most common and therefore could save your business the most time.

## Customer service tasks

- Call and Contact Centre Processes
- Transaction Automation
- Service Requests and Scheduling
- Renewal Notices

The more customers you have, the more time RPA could save your organisation. Customers routinely require account access assistance (e.g. updating their email addresses or resetting passwords) and chatbots can be set up to identify questions and provide common answers, with the option of elevating the issue to a human worker if needed.

## Customer onboarding tasks

- New Customer Applications
- Upsell Opportunity Reporting
- Online Registrations
- Customer Welcome Packs
- New Customer Eligibility
- Customer Retention

Customers enjoy personalised messages and user journeys when they join a platform, which is ideal for RPA implementation. Consider streaming platforms or other companies that provide an algorithm-backed service – when a customer joins and sets up their profile they are asked to select from a menu of preferences/topics/genres so the algorithm can start serving content. The same principle can be applied to many other businesses and parts of the customer onboarding process – using automation to ask for customer preferences and then serving them welcome packs and offers based on their choices.

## Marketing tasks

- Market Intelligence
- Invoice Creation and Distribution
- Data Management
- ERP Automation
- CRM Updates
- Social Media Monitoring
- List Building
- Business Intelligence Reporting
- Sales Quote Automation

Whatever they're working on, Marketing teams back their creative ideas with reliable data. Data management and gathering market intelligence are two of the most valuable tasks that RPA can accelerate for your Marketing team. Marketing automation and Customer Relationship Management also demand using large amounts of customer data as your team builds email lists for dedicated nurture streams – automating how these customers are sorted into these lists saves valuable time and removes human error.

## IT tasks

- Installations
- Application Integration
- Server and Application Monitoring
- Data Aggregation and Migration
- File and Document Management
- ERP/Other Systems Integration
- FTP Management
- Batch Processing
- User Setup and Configuration

Just as it can in Marketing, RPA can greatly help IT teams gather and interpret a large amount of data. IT teams can also lose valuable time to small tasks that support the rest of the business, such as user setup and solving tech issues. Automating as many of these tasks as possible helps keep your team working on valuable, strategic work while ensuring the rest of the business is still supported.

## Supply chain tasks

- Supply and Demand Planning
- Shipment Scheduling and Tracking
- Inventory Management
- Invoice, Quote and Contract Management
- Supplier Portal Integration
- Freight Management
- Work Order Management
- After-Sales Handling

Improvements in Machine Learning mean that RPA now has important applications in Supply Chain Management. SCM can benefit from inventory management automation by setting bots to automatically reorder products when stock reaches a set level. Historical data can also be used to predict demand patterns while allowing for spikes in activity.

## Finance tasks

- Vendor Onboarding/Maintenance
- Vendor Portal Queries
- Funds Transfer
- Incentive Claims
- Comparables Pricing
- Collections
- Report Aggregation
- Journal Postings

Removing human error is an important benefit of implementing RPA in a financial organisation. And Gartner estimates that one bot can complete 30 times the work of a human employee, meaning a greater amount of work can be completed with a greater degree of accuracy.

## Legal tasks

- Screening and Risk Management
- IP and Fraud Detection
- Policy Admin and Servicing
- Credential Verification
- Licensing and Registrations
- Outside Affiliations Review
- Periodic Disclosures

Legal tasks are ideal opportunities to show how automation can be used to assist, rather than replace, human work. Staying compliant with legislation is essential to business operation though reviewing the phrasing of documents and contracts is long work filled with interpretation. RPA can accelerate your legal staff's review procedures while they remain in control of what is approved and what needs flagging as legal risk.

## HR tasks

- Employee History Verification
- Employee Onboarding/Offboarding
- Payroll
- Time and Attendance Management
- Training and Upskilling
- Employee Data Management
- Tax Management
- Benefits and Stocks Admin

Large companies with thousands of staff can save great amounts of time with RPA by automating elements of their HR. Initial opportunities can be focused on financial tasks, including payroll and tax management, although the onboarding and upskilling side of HR should not be overlooked. Bots could be customised so they cater to different training needs and manage a wide range of data loads (which will naturally differ between departments and teams).

## Vendor management tasks

- Vendor Sourcing
- Vendor Qualification
- Vendor Onboarding/Offboarding
- Vendor Reviews
- Vendor Portal Integration
- Vendor Agreement Maintenance
- Contract Monitoring and Enforcing
- Vendor Performance Management

RPA can accelerate your vendor review, selection, and onboarding processes, meaning you spend less time talking about work and more time getting it done. Compliance risks can also be identified quickly against regulations at multiple levels (local, national, international etc.) as well as against your internal policies.

<b>Task Categories:</b> <ul style="list-style-type: none"> <li>Multi-Purpose</li> <li>Customer Service</li> <li>Customer Onboarding</li> <li>Marketing</li> <li>IT</li> <li>Supply Chain</li> <li>Finance</li> <li>Legal</li> <li>HR</li> <li>Vendor Management</li> </ul>										55 <b>Ve</b> Credential Verification							
1 <b>Cp</b> Competitive Pricing and Monitoring	2 <b>Du</b> Customer Due Diligence	5 <b>Co</b> Compliance Reporting											52 <b>Sc</b> Screening and Risk Management	56 <b>Lc</b> Licensing and Registrations			
3 <b>Cu</b> Customer Data Management	6 <b>Po</b> Sales and Purchase Order Processing	12 <b>Ca</b> New Customer Applications	13 <b>On</b> Online Registrations	14 <b>El</b> New Customer Eligibility	15 <b>Up</b> Upsell Opportunity Reporting	16 <b>We</b> Customer Welcome Packs	17 <b>Rt</b> Customer Retention	36 <b>Sd</b> Supply and Demand Planning	40 <b>Sh</b> Shipment Scheduling and Tracking	44 <b>Om</b> Vendor Onboarding and Maintenance	53 <b>Ip</b> IP and Fraud Detection	57 <b>Ou</b> Outside Affiliations Review					
4 <b>En</b> Customer Engagement Comms	7 <b>Re</b> Refunds and Returns	18 <b>Mi</b> Market Intelligence	21 <b>Li</b> List Building	24 <b>E</b> ERP Automation	27 <b>I</b> Installations	30 <b>Ft</b> FTP Management	33 <b>Da</b> Data Aggregation and Migration	37 <b>Im</b> Inventory Management	41 <b>Ma</b> Invoice, Quote and Contract Management	45 <b>Qu</b> Vendor Portal Queries	54 <b>Pl</b> Policy Admin and Servicing	58 <b>Pe</b> Periodic Disclosures					
8 <b>Cc</b> Call and Contact Centre Processes	10 <b>Tr</b> Transaction Automation	19 <b>Da</b> Data Management	22 <b>Sq</b> Sales Quote Automation	25 <b>Sm</b> Social Media Monitoring	28 <b>Mo</b> Server and Application Monitoring	31 <b>Us</b> User Setup and Configuration	34 <b>Sy</b> ERP/Other Systems Integration	38 <b>Pi</b> Supplier Portal Integration	42 <b>Fr</b> Freight Management	46 <b>Fu</b> Funds Transfer	48 <b>Pr</b> Comparables Pricing	50 <b>Ag</b> Report Aggregation					
9 <b>Se</b> Service Requests and Scheduling	11 <b>Rn</b> Renewal Notices	20 <b>Cr</b> CRM Updates	23 <b>Iv</b> Invoice Creation and Distribution	26 <b>Bi</b> Business Intelligence Reporting	29 <b>Fi</b> File and Document Management	32 <b>Ap</b> Application Integration	35 <b>Ba</b> Batch Processing	39 <b>Wo</b> Work Order Management	43 <b>As</b> After-Sales Handling	47 <b>In</b> Incentive Claims	49 <b>C</b> Collections	51 <b>Jp</b> Journal Postings					
										59 <b>Hi</b> Employee History Verification	60 <b>Eo</b> Employee Onboarding/Offboarding	61 <b>P</b> Payroll	62 <b>Ti</b> Time and Attendance Management	63 <b>Tr</b> Training and Upskilling	64 <b>Ed</b> Employee Data Management	65 <b>Tx</b> Tax Management	66 <b>Be</b> Benefits and Stocks Admin
										67 <b>Vs</b> Vendor Sourcing	68 <b>Vq</b> Vendor Qualification	69 <b>Vo</b> Vendor Onboarding/Offboarding	70 <b>Vr</b> Vendor Reviews	71 <b>Vp</b> Vendor Portal Integration	72 <b>Va</b> Vendor Agreement Maintenance	73 <b>Cm</b> Contract Monitoring and Enforcing	74 <b>Pm</b> Vendor Performance Management

## We know automation.

Our automation services are delivered by experienced consultants and engineers that ensure you can deliver your business outcomes. Explore how RPA can help your business save time and money by speaking with a member of our team.

# Five essential RPA questions for your organisation

## Five essential RPA questions for your organisation

Robotic Process Automation, or RPA for short, is a suite of technologies for automating entire business processes. Unlike many alternative forms of automation, it can be cost-effectively applied to existing processes with little or no application changes. This means your organisation can automate processes through the same applications (including desktop, web and Citrix hosted) that are currently in use, as well as behind the scenes with databases and APIs.

RPA's flexibility extends to both modern and legacy applications which your critical business processes rely on. The most effective use of RPA is the automation of static, rule-driven activities. In these scenarios, RPA can add a powerful support element to complement your existing structure through automated programs that can work around the clock, won't suffer burnout or make errors through fatigue.

While the benefits of RPA are enticing, organisations shouldn't assume it's the best solution for their existing systems. Here are five key RPA questions for you and your organisation:

## Question 1

Can your processes be significantly optimised through minor process or application changes?

If so, these options should be given very careful consideration over RPA as they will usually be more practical to implement. Small changes with tools and talent already at your disposal allow your organisation to focus on an ideal future state of operations where efficiency and traditional automation can be considered a requirement from the offset.

Once RPA is applied, it can be very difficult to implement further application changes later down the line as such changes will also have to be factored into the automated process which now runs on top of your established process.

However, many of our clients have applications that cannot be easily adjusted to accommodate desirable business scenarios. This can be due to legacy codebases or mission-critical needs which make changes too risky to perform. In these scenarios, RPA can be very cost-effective as an interim or permanent way to automate your business process.

## Question 2

Are your business processes fully understood and documented by all teams that are involved?

The most obvious answer to this question is 'yes'. However, processes performed by humans have a surprising habit of deviating from the original vision over time. This usually happens through minor enhancements, shortcuts or speed tricks introduced by SMEs or that Excel macro-wiz in your department. As a result, it's critical to invest time in discovery and analysis to fully determine the scope of effort involved in introducing automation because changes are usually passed along through introductory training sessions or internal workshops rather than formal documentation.

This discovery is best performed with the end-users who know the intricacies and edge cases of the process they perform regularly. This will allow for formal documentation to be produced which ensures the business vision for automation can be fully realised.

## Question 3

### What tools can be used to automate your processes?

Many tools exist for RPA with various levels of functionality and many modern business applications from the likes of Microsoft, Google, and Atlassian already include capabilities to introduce micro-automation within the scope of their software suite. These can be as simple as rules within email clients or CRMs which handle known business scenarios and are easy to set up and maintain.

More sophisticated tools such as Automation Anywhere, Blue Prism or UiPath can be used to automate existing processes on almost any application. These tools typically require a higher level of both investment and technical expertise to use effectively. However, this investment puts a significant amount of automation potential at your disposal and offers a single technology to automate an entire process across multiple applications or deployments.

## Question 4

### What is the existing perception of automation within your organisation?

Although the possibilities for significant business efficiency and enhancements are exciting concepts for senior management, the terms 'Automation' and 'Robotics' can be frightful to your frontline staff. This is with good reason: a significant number of industries now use automation instead of human workers and these comparisons should not be ignored.

Instead, they should be put into perspective. We find that our clients consider automation as a tool to augment their existing human workforce rather than replace it. Your team may have already unconsciously employed their micro-automation through email rules or task management software.

RPA has the potential to ensure that your processes are not reliant on temporary workers or overtime to achieve your goals and deadlines. Terminology and the use of personification can also be a strategic way to shift opinion. The term 'Automated Assistant' is much less imposing than 'Robot'. Furthermore, many of your existing team members would jump at the chance to have a personal assistant to pick up mundane tasks which take them away from the work that requires real human brain power or a personal touch.

As such, the development of a bot should be considered akin to the training of a new employee. RPA developers will produce an assistant that follows your instructions without deviation, will queue and prioritise activities as you assign them, and doesn't mind receiving that last-minute email at 18:00 on a Friday for that essential task that can't wait until Monday.

## Question 5

Can your most complex, convoluted processes be effectively automated?

In short, almost anything can be automated if the investment is tangible. The most effective way to break tasks down is through the discovery and analysis of your existing as-is process and your desired to-be solution. An external RPA team can provide a wealth of automation experience and knowledge to help you effectively realise the potential of RPA.

One benefit is the ability to break down your existing process into smaller, micro-processes. Today, the most practical way to complete your process may be to assign it to a case matter expert because the introduction of less-experienced or unfamiliar staff could result in a net productivity decrease.

RPA, on the other hand, can be used to split a complex task into smaller microtasks that leverage all the robots you have at your disposal. They can communicate with one another and distribute tasks to other robots or human users at key points to ensure escalation and efficiency.

The result is a scalable workforce that understands the breadth of your organisation's needs, the priority of work assigned to them for effective task management, and ultimately frees up your invaluable colleagues so they can do what they do best: being human, not robots.



**How automation  
affects  
workplace culture**

# How automation affects workplace culture

Automation can bring a wealth of new possibilities to your organisation. Properly implementing this exciting technology into your existing processes and practices can improve operational efficiency but what can't be underestimated is how automation can affect your workplace culture.

If you're planning on implementing automation in your organisation or expanding its use, you must take some time to reflect on how your broader workforce may be affected and what steps you can take to ensure the technology is introduced smoothly to everyone it impacts.

## Can automation negatively affect your culture?

Without proper leadership, the blunt answer is: yes.

You must remember that not everyone in your organisation may be ready to adopt automation as eagerly as you or your senior leadership team. Some employees worry that automation technology is here to replace them by providing a cheaper, more reliable option. With the cost of living at the front of everyone's minds, technology such as RPA is seen as a risk, rather than an opportunity. Worries about job security are only natural.

Automation should not be seen as solely a 'tech' solution. It's a solution that can affect your entire workforce. Workplaces of all kinds – from warehouses to call centres, accounting offices, hospitals, and retail stores – can utilise automation in a variety of ways. This means a wide range of staff may use the technology you implement, and the more people you affect, the greater the range of technical aptitude you have to deal with.

Employees can also grow confident and comfortable in their existing roles. When you apply technology to those roles and potentially change the tasks and responsibilities those employees must carry out, they can naturally be hesitant. You're changing their role and not everyone may be ready to make the transition smoothly.

As you can see, automation affects your culture when there is a lack of communication and leadership. When you bring new technology into your organisation without properly communicating it through all levels of your staff, they can feel that it is being 'forced upon them.' This can breed reluctance and misinformation, and ultimately stop automation in its tracks before you have a chance to reap its rewards.

## How to prepare your workplace for using automation

Staff appreciate honesty, transparency and consideration from their leaders. These qualities are paramount to discussing how automation will change their roles for the better and help them develop. Below are five essential steps to improving your workplace culture:

### Demonstrate leadership

Employees need a central point of information when they want to learn more about how planned automation is going to affect them. This helps you control what information they hear, ensuring them that they never misunderstand your organisation's implementation plans, and inspires confidence throughout your workforce. Try to assign yourself this role or champion a member of your staff with a high level of technical knowledge and a wide understanding of how the business operates.

## Speak with your staff regularly

As we've mentioned earlier, you don't want staff to feel as though automation is being forced upon them. Host discussions with your staff as early as possible in your implementation plans to show that you're making decisions with their opinions in mind. After this initial conversation, keep them abreast of developments and continue to communicate with them.

You should also regularly canvas their opinions to find more opportunities to utilise automation. Who knows the ins and outs of your business better than the staff on the front lines? Asking what tasks they want to automate turns tech implementation into a collaborative process, rather than an edict that staff may resist.

## Reinforce the benefits of automation

When faced with opposition or questions about automation, keep the benefits of the technology at the forefront of your discussions. You're trying to help your staff complete tasks faster, with more accuracy, and free up time for responsibilities that demand their time. Some staff may not buy into the expected advantages of automation from the start, so keep their perspective on the long-term benefits they'll feel and show your plans aren't just a flash in the pan.

## Plan and explain technical training

Other members of staff may be on board with automating parts of their work but have doubts about the training they'll need to complete. This can be particularly true for workers that have heavily-manual roles such as warehouse staff. You can relieve these doubts by providing a clear training plan to your employees to show how they'll develop their skills to incorporate elements of automation. Emphasise that this is a chance for professional growth and reframe a daunting prospect into an opportunity.

## Be clear about what kind of automation you'll use

The perception that automation technology will 'eliminate' or 'replace' regular workers is still prevalent. That's why you must not use 'automation' as a catch-all term. Be detailed in your explanation of how it will be applied and how your staff will still play an important role in your operations. One clear starting point is explaining the difference between attended and unattended automation, which clearly shows how bots can be used as assistants to tackle repetitive tasks while complex ones (such as specific customer service requests) are elevated to a human supervisor.

# RPA evaluation process

## RPA evaluation process

In order to fully release the value of effective RPA implementation, it's important to have a robust evaluation framework in place. The analysis of an automated workflow is as important as the code itself.

- 1 Short-select RPA opportunities**  
Identify an initial list of automation candidates that the business believes has automation potential
- 2 Score opportunities using evaluation framework**  
Create current state process flows and gather relevant information to determine automation feasibility
- 3 Review results of prioritized opportunities**  
Review the scoring results and process selection order
- 4 Validate results of prioritised opportunities**  
Participants will discuss and provide input on the initial prioritisation list and process selection
- 5 Determine most suitable tools**  
Evaluate what tools are most suitable based on processes identified for automation, likely future automation potential and budget
- 6 Finalize results and develop process flows**  
Update the prioritisation list and begin development work on a prioritised process as part of a proof of concept

# Get in touch

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Book a call  
with our team

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