Automating Common And Repetitive Tasks With RPA

Ten10

Client: Global Law Firm

Industry: Legal

Technologies: UiPath

Ten10 Services: Robotic Process Automation (RPA)

The customer is an International Law firm specialising in a wide range of legal services including litigation, intellectual property, sport and finance.

The Project

The customer identified the potential benefits that can be achieved by implementing RPA across a number of business areas and processes - namely to utilise robotic processing to automate common and repetitive manual production tasks and thus allow better utilisation of valued people.

They wanted to create an initial capability to help define and implement RPA opportunities with a view to establishing an ongoing RPA service.

The customer engaged Ten10 to design and deliver the initial implementation of RPA to demonstrate the capabilities and opportunities it presented to the firm.

What We Did

Ten10's RPA team (consisting of a lead, BAs and RPA developers) started by engaging with key business and technical stakeholders to establish the key processes in scope for RPA, understand the process steps and start to take ownership of the project delivery, subsequently producing a delivery plan with the customer's Project Manager. Ten10 RPA team activities included:

- Prioritisation workshops were conducted to confirm which processes yielded the highest value for the customer and would be prioritised for the initial engagement
- Prioritised processes were further assessed by the RPA Lead and business analysts to confirm the feasibility of automation from both a technical and ROI perspective. This was achieved through Process Design Documents (PDDs) which bring together the existing as-is manual state and proposed RPA future state along with all known risks, challenges, pre-preparation requirements and development estimation into a single cohesive document for stakeholder review
- Signed off processes were then assigned to RPA developers. The RPA developers followed agile principles and were responsible for producing the business approved Bots and deploying attended (running on end-user machines) and unattended (running on servers behind the scenes) bots across the customer's estate

Challenges

Working as a remote team, and the project kicking off during the COVID-19 pandemic, a number of unique challenges were experienced.

Working with a customer team in a different timezone

This had challenges in terms of timezones and face to face collaboration between teams, which were further exacerbated during the Covid-19 crisis where any inter-office travel was paused. Ten10's exceptional experience of delivering remote services allowed this challenge to be mitigated.

Our experienced RPA Lead ensured regular communication between all stakeholders were in place through regular status calls whilst both offices were online and detailed reporting which highlighted any risks and issues that needed escalation. The team also utilised Azure DevOps as a collaboration tool which allowed for a single point of contact for all project work rather than using multiple offline documents. Where needed the team would also flex their hours to ensure they were available during the hours when Bots were put live. This ensured that support coverage was available.

Changing priorities of business processes identified for RPA

During the early weeks of the project, the prioritised list of processes changed on a number of occasions. Our experienced and UiPath certified team were able to be flexible and react to change, modifying project plans to allow changing business priorities to be met. To further manage these changes, our RPA Lead put in place a formal stage-gate to lock down the new process list and allow the team to commit to a set of deliverables. This allowed the team to focus and plan with confidence, whilst still adopting the agile principles of backlog management where the process from the backlog could be added should capacity allow it.

Benefits

As of November 2020, Ten10 has worked with the customer to deliver several strategically significant automated processes across multiple business lines using the UiPath RPA suite of technologies. Successful implementations include:

- The delivery of an automated workflow that populates a dynamic, 170 field third party online registration form with data extracted from an internal application via a REST API. Bots deployed for this process are capable of making submissions 24/7 and can submit individual submissions 66% faster than human users. The successful implementation of RPA enabled the customer to submit over 5,000 complete registrations and fulfil its regulatory obligations within government-stipulated deadlines

- The delivery of an attended bot workflow that works alongside human administrators to perform the secure transfer of customer certificates from the third party platform of origin to the internal client CMS, updating document metadata to align with the customer requirements in the process. This workflow supports upwards of 20 downloads daily during regular periods, with up to 20,000 a month during peak periods. The delivery of the RPA solution transformed this task from a labour-intensive manual process with humans handling thousands of documents between systems to the population of a single Excel spreadsheet that provides details of the required downloads to the bot

- The successful delivery of an unattended bot workflow that inputs and reviews over $100m worth of financial transactions within the customers in house, Java-based fiduciary platform daily. The introduction of this automated process provided much-needed support to a team operating beyond maximum daily capacity. Transactional data for this process is treated with maximum priority and assigned to all available bots, with preoccupied bots disengaging from existing tasks to support activities if required to achieve SLAs. A regular report is provided to the human members of the team for both audit purposes of bot activities and escalation for human input if a transaction could not be completed by a bot

All of these processes have significantly saved man-hours in the customer's live environment, improving process efficiencies and allow manually team members to be better utilised elsewhere.

Throughout the engagement, the UiPath certified team of Ten10 Developers, Business Analysts and Solution Architects have supported the customer throughout all stages of RPA delivery - preparation, solution design, build, test, stabilisation and continuous improvement, all whilst working remotely.