



Work Like Tomorrow.™

NO RIP & REPLACE NEEDED: A 6-STEP STARTER KIT

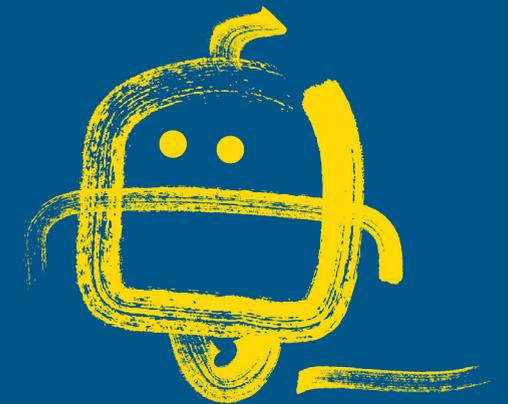
TO IMPLEMENTING ROBOTIC PROCESS AUTOMATION

KOFAX

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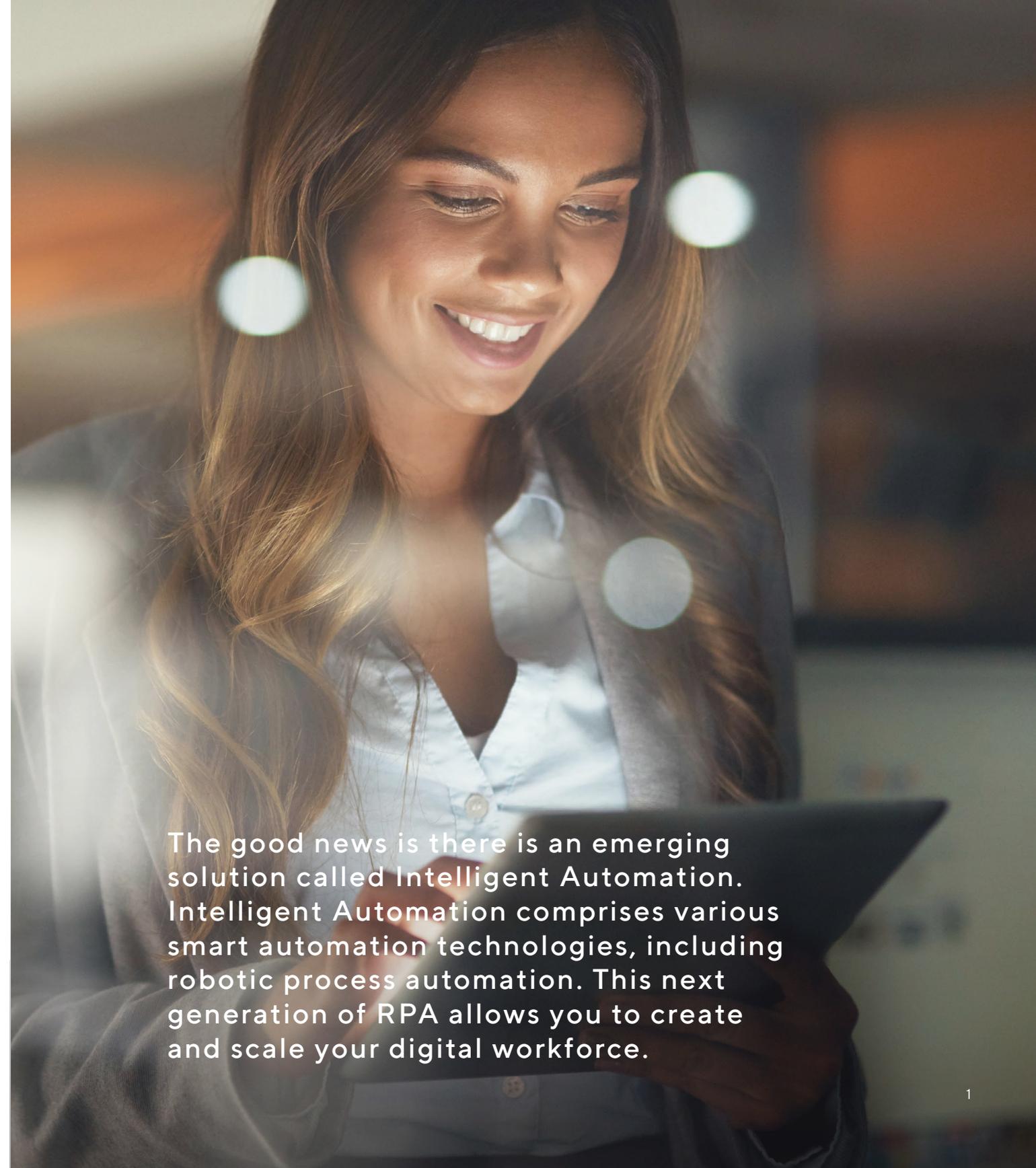
HOW TO DIGITALLY TRANSFORM THE WAY YOU WORK



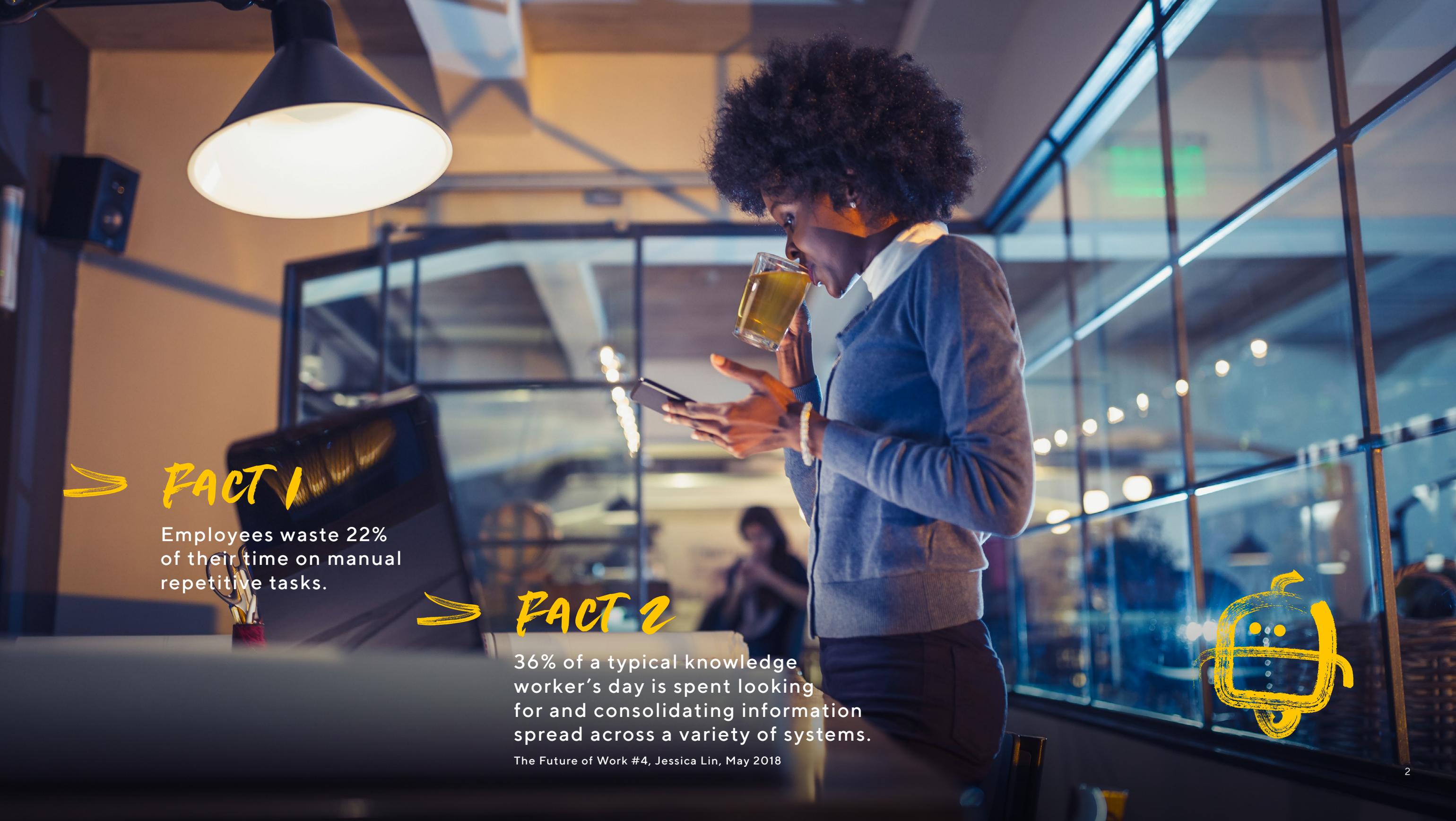
Many organizations still rely on manual tasks for vital business processes, such as collecting, reviewing and inputting information between systems, websites, portals and documents – internal and external.

These repetitive, remedial tasks require your employees to log in and out of multiple systems, copying and pasting data between different sources and formats. In addition to being mind-numbing work, manual tasks are also highly inefficient and inaccurate – especially when compared to the predictability of automated work processes.

But, as IT departments struggle to respond rapidly to the more pressing needs of business groups, key automation initiatives tend to get postponed, rescheduled or forgotten. The result is manual work lives on, and the status quo for inefficient operations remains.



The good news is there is an emerging solution called Intelligent Automation. Intelligent Automation comprises various smart automation technologies, including robotic process automation. This next generation of RPA allows you to create and scale your digital workforce.



➤ **FACT 1**

Employees waste 22% of their time on manual repetitive tasks.

➤ **FACT 2**

36% of a typical knowledge worker's day is spent looking for and consolidating information spread across a variety of systems.

The Future of Work #4, Jessica Lin, May 2018





RPA CAN BE DEPLOYED IN A MATTER OF WEEKS, NOT MONTHS

RPA is easier to implement than you think.

RPA is emerging as a viable technology for solving data integration and automation challenges that never seem to get solved. With RPA, intelligent software robots are configured to perform tasks previously performed manually by a person, freeing up your employees for more valuable work.

Thanks to cost-effective RPA solutions, organizations are achieving quick and powerful results. Businesses across all industries and sectors are leveraging RPA to slash processing times, cut costs and outpace their competitors.

You don't need to disrupt your daily operations to get up and running with RPA. And, even better news, it can be deployed in a matter of weeks, not months, as it does not rely on the use of complex APIs and coding.

FACT 3

IT Robotic Automation Market to be worth over \$11 million by 2026.





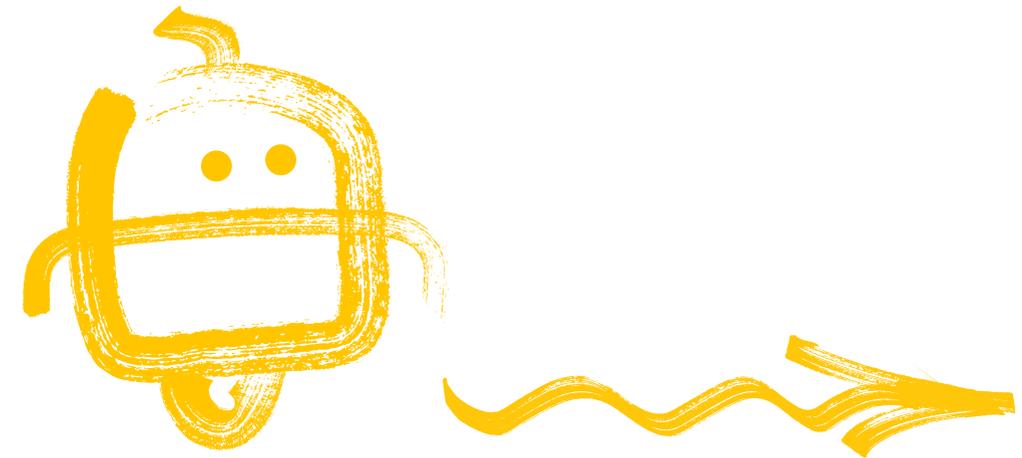
HOW TO BUILD YOUR DIGITAL WORKFORCE

In this guide, you'll learn how to gain the benefits of RPA – without ripping out or replacing your current systems or putting your organization at risk. You'll discover:

- ◆ How to identify exactly which manual tasks to automate, so you can focus employees on innovation and more valuable work.
- ◆ Keys to quickly gaining executive and IT buy-in for an RPA implementation.
- ◆ Who should – and shouldn't – design RPA for your organization. And who should beta-test it.
- ◆ Best practices from industry analysts that will help ensure your RPA implementation is a success.
- ◆ How to avoid common pitfalls that can slow you down and increase your costs.

Read on to learn more about RPA and how to harness its power for your organization.

Discover integration tips and how to prepare your business for RPA, so you can streamline your processes and achieve big results. It's easier than you think.





PROCESS AUTOMATION IS GAINING TRACTION, BUT THERE'S STILL WORK TO BE DONE

Many organizations still rely on error-prone manual tasks in key areas of their businesses.

All current trends in business point to a reality of flux. Per a recent e-book by the Association of Information and Image Management (AIIM), 79 percent of organizations now indicate that BPM (and by default, automation) is significant (45 percent) or imperative (34 percent) for the success of their business – up from a total of 55 percent in 2016.²

Although many organizations have applied some level of process automation, many tasks still fall through the cracks. The gaps could be caused by legacy systems that are difficult to integrate with modern applications or by data collection from external sources, such as portals, which can be difficult to integrate with internal processes. In addition, some core business processes have numerous exceptions that fall outside of normal automated processes.

“Most organizations still have a lot of routine processes that use employees to manually manipulate structured and unstructured data.

The reason these processes have escaped automation until now is a mélange of traditional practices, cost of integration of systems and lack of organizational discipline around multiple process variations.”³

–Gartner



²Digital Technologies Are Making Smart People and Businesses Smarter by Automating Rote Work, 2015

³Gartner, Use Cases for Robotic Process Automation: Providing a Team of 'Virtual Workers', 26 October 2015,



THE GROWING COSTS OF NOT AUTOMATING MANUAL TASKS

But if you don't address these process challenges now, here's what could happen:

- ◆ Operational inefficiencies and reduced productivity
- ◆ Slowed customer responsiveness and dissatisfaction
- ◆ Compliance and security risks
- ◆ Inconsistent workflows or processes leading to lost revenue
- ◆ Increased labor costs for employees to do manual, repetitive work
- ◆ Lack of visibility into processes and inability to pinpoint problems

Despite these risks, automating these manual tasks is often a low priority. IT teams are often overburdened by other business requirements and simply can't get to all of the project requests.

However, automating these manual tasks isn't as complex as you might think.



Recognizing that manual tasks slow your operations and you're missing automation opportunities is the first step towards process improvement and transformation.



DRIVING EFFICIENCIES WITHOUT REPLACING YOUR CURRENT SYSTEMS

RPA can automate tasks that are the exceptions in your previous process automation efforts. These tasks include looking up information, as well as copying and pasting between:

- ◆ Back office systems
- ◆ Public websites
- ◆ Web portals
- ◆ Legacy applications
- ◆ Microsoft Excel and other desktop applications
- ◆ Other data sources

RPA integrates with (rather than replaces) your existing technology, so it is both complementary to core systems and non-disruptive to your day-to-day operations. This means that you don't have to rip out your core systems or disrupt your day-to-day business. Think of RPA as a digital workforce that works side-by-side with your employees to drive process improvements.

RPA does not rely on complex integration and process re-engineering. Instead, it uses intelligent software robots to mimic human actions while applying sophisticated business rules along the way. These software robots can do all the manual and mundane tasks that are now major time-sinks for your valuable employees.

RPA augments and complements both business process management (BPM) and case management automation platforms. A diversified approach that includes software robots, human workers and BPM or case management is an ideal, forward-thinking option.





WILL RPA WORK FOR MY INDUSTRY?

RPA can be used to automate manual tasks in any industry. Here's how leading organizations are using RPA to improve their operations:

- ◆ In the [transportation and logistics](#) sector, RPA can automate shipment scheduling and tracking, load researching and invoicing and credit collections.
- ◆ For manufacturing, [supply chain automation](#) with RPA can dramatically reduce the time to market and simplify supplier interactions.
- ◆ For [banking](#), RPA can streamline mortgage lending processes, verification activities, customer onboarding, compliance and risk management reporting and customer service.
- ◆ In the [insurance industry](#), RPA is used to simplify claims processing and administration, new business/underwriting, policy maintenance, compliance and risk management reporting and customer service.
- ◆ For healthcare, RPA helps medical professionals and administrators to keep centralized medical records, handle admissions and verify patient eligibility and physician credentialing.
- ◆ RPA can automate many [finance and accounting](#) activities, including order fulfillment, financial close, submitting vendor invoices and tracking payments.



If your staff is performing repetitive, rules-driven tasks to acquire, analyze and act on information or process a high volume of incoming information, this points to activities that are ready for RPA.

FACT 4

Enterprises, on average achieved 30-40% improvement in operational metrics such as process accuracy, cycle time, staff productivity and SLA compliance from RPA/AI.⁴

TIP

If your staff is performing repetitive, rules-driven tasks to acquire, analyze and act on information or process a high volume of incoming information, this points to activities that are ready for RPA.

⁴Smart RPA Playbook, Service Optimization Technologies Marketing Report, Everest Group Research, November 2018





6 STEPS TO IMPLEMENTING RPA PLUS A BONUS STEP!

Payback was reported at less than 12 months, with an average 20% of full-time equivalent (FTE) capacity provided by robots.⁵ Here are 6 steps – plus a bonus step – to building a case for RPA and integrating it into your business processes, so you can drive real value.

⁵ The Robots Are Ready, Are You? Deloitte Consulting, 2018



IDENTIFY WHICH MANUAL TASKS TO AUTOMATE

When you look for tasks to automate, Cognizant⁶ recommends considering “the ‘long tail’ of process steps that haven’t been automated by core systems.”

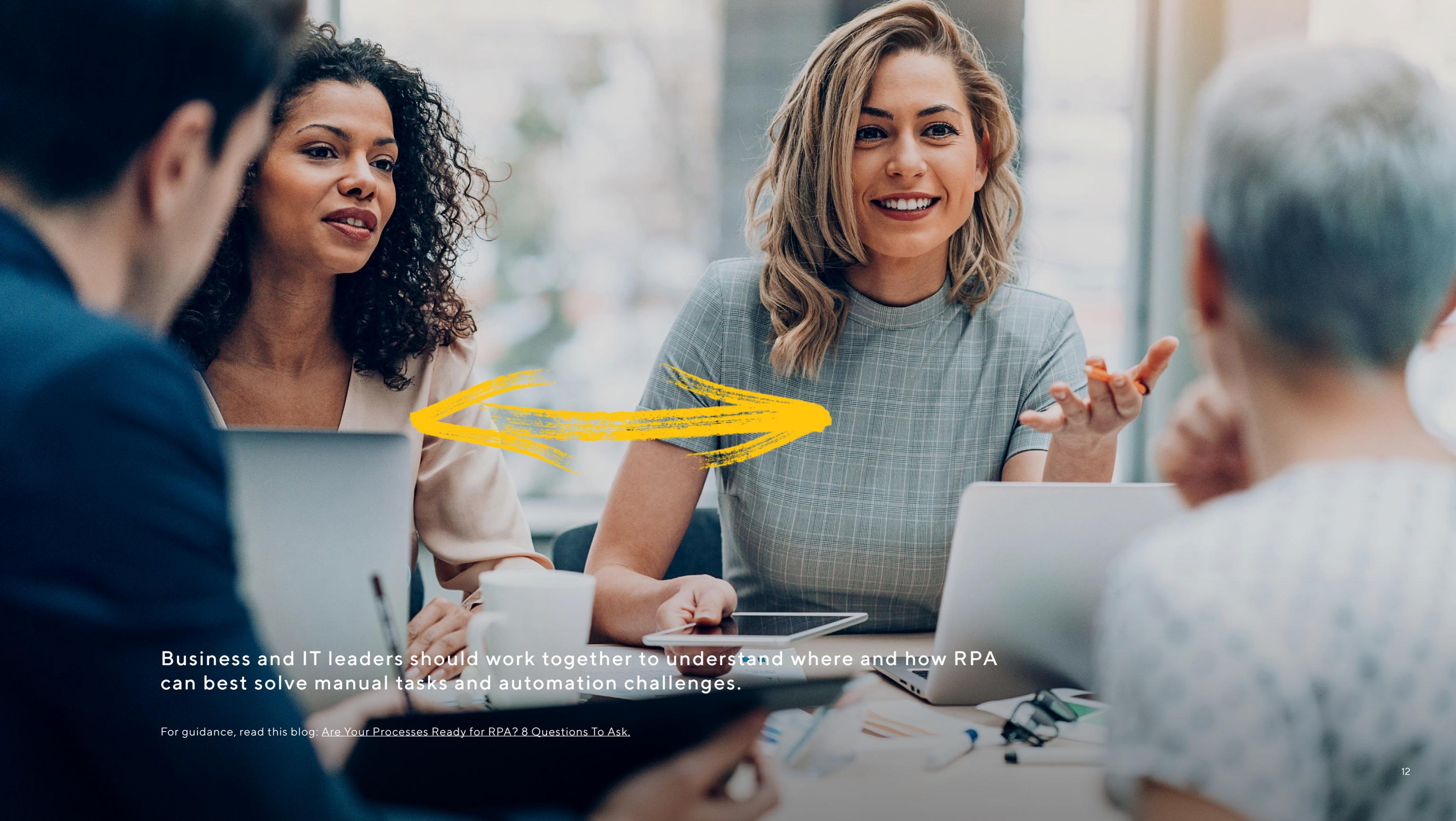
These use cases are usually process workarounds that entail manual inputs to get systems ready for processing knowledge work (i.e., claims processing, audit preparation, logging customer contacts, verifications, creating reports, etc.).



Places to examine include:

- ◆ Areas that are underperforming, such as in customer service, or in big company initiatives such as digital or process transformation.
- ◆ Where rigid applications are creating bottlenecks. For example, you may have a mix of systems, old and new, along with duplicative systems that have come by way of acquisitions like ERP, CRM and other core systems that don’t communicate with each other.
- ◆ Processes that you can’t scale until you hire more people.
- ◆ Manual, low-skill tasks that take time away from your highly skilled employees’ top projects.
- ◆ Gathering data to create reports.
- ◆ Data entry that is prone to human error.
- ◆ Tasks that you are considering outsourcing but want to keep in-house.
- ◆ By identifying areas that require human action, you’ll determine where automation can streamline your workflows and boost productivity.

By identifying areas that require human action, you’ll determine where automation can streamline your workflows and boost productivity.



Business and IT leaders should work together to understand where and how RPA can best solve manual tasks and automation challenges.

For guidance, read this blog: [Are Your Processes Ready for RPA? 8 Questions To Ask.](#)

#2 EVALUATE AND SELECT THE RIGHT RPA VENDOR

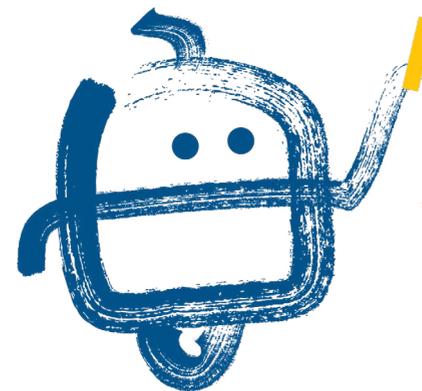
RPA can make a big, immediate difference to your operations. But not all RPA solutions are created equal.

Some RPA solutions rely heavily on scraping web data from computer screens. Others rely on simple desktop recording practices that record the clicks and keystrokes of users. Both work, but only as long as website data is all you need – and those websites never change.

But both are also extremely difficult to maintain and can leave you wondering, “what data did I miss?”

Use a [checklist](#) of the needed features and functionality that are critical to selecting the right RPA solution. You’ll want to be sure it meets the needed criteria in these key areas:

- ◆ Scalability
- ◆ Speed
- ◆ Reliability
- ◆ Simple
- ◆ Smart
- ◆ Flexibility
- ◆ Enterprise-grade security
- ◆ Enterprise-class
- ◆ Expandability

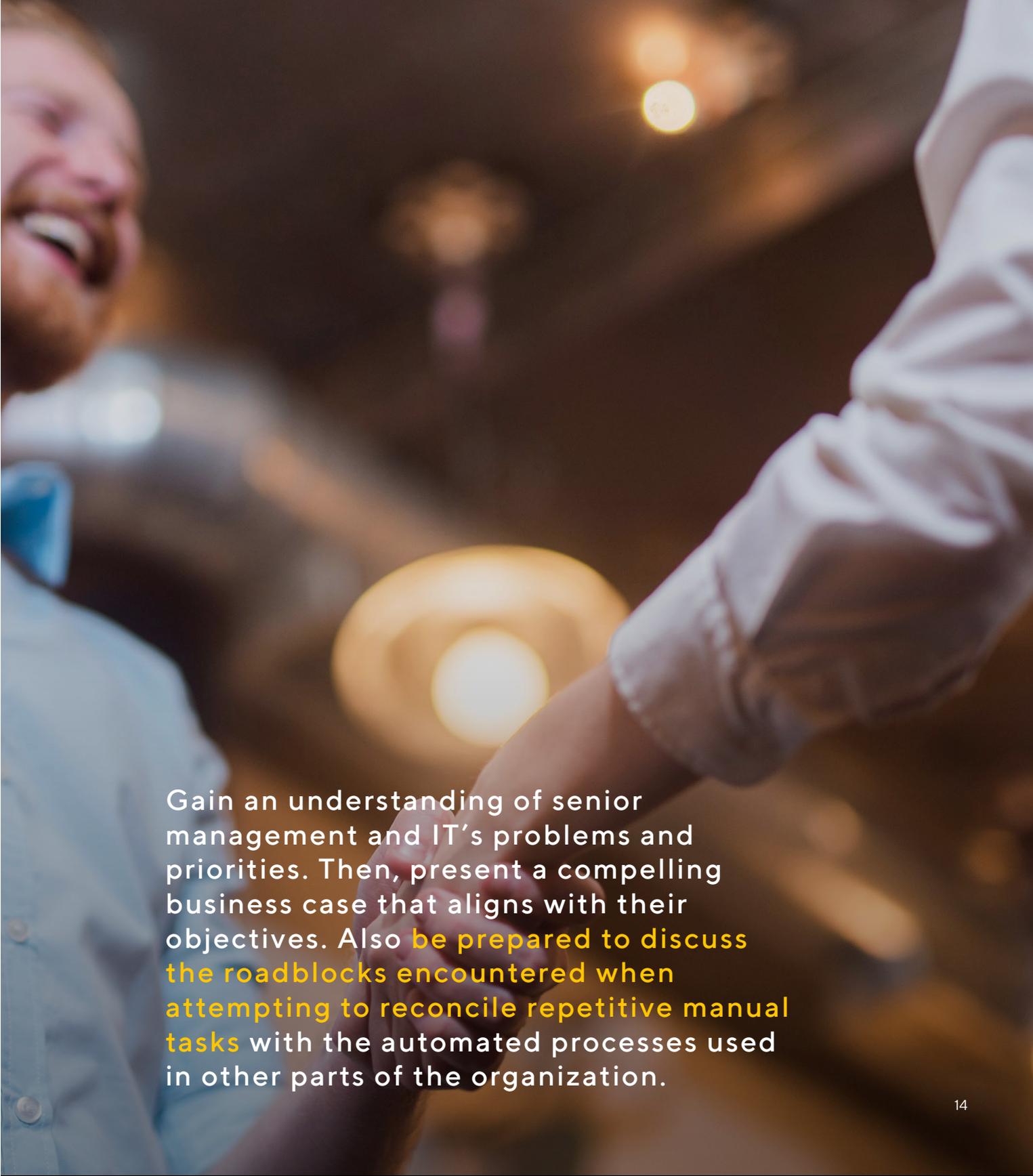


#3 BUILDING EXECUTIVE & IT CONSENSUS AND CREATING A CENTER OF EXCELLENCE

Showing executives the value of RPA is critical to getting buy-in. Consider how RPA can help them achieve their goals.

For example, senior management is looking to improve business agility, innovate faster, improve decision-making and gain a competitive edge. They are also always concerned about costs and budgets. For IT, they are looking to improve agility to address the needs of the business quicker and tackle the projects that never seem to get addressed, shorten deployment times, decrease or eliminate touch points and help reduce desk tickets.

Part of the best practices include creating a center of excellence, not only for governance purposes but also for creating a scalable, functional and technical environment.



Gain an understanding of senior management and IT's problems and priorities. Then, present a compelling business case that aligns with their objectives. Also be prepared to discuss the roadblocks encountered when attempting to reconcile repetitive manual tasks with the automated processes used in other parts of the organization.

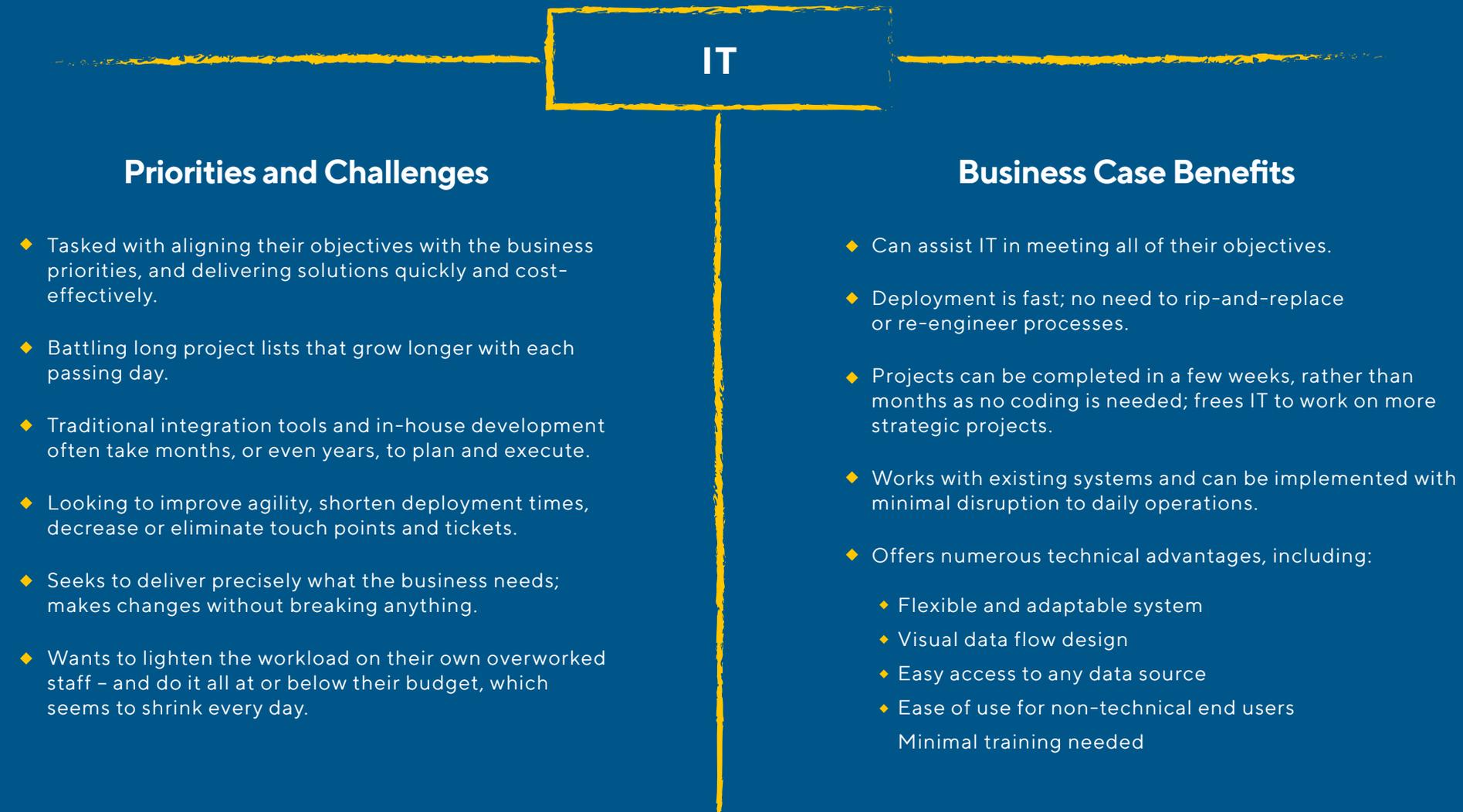
MAKING THE BUSINESS CASE FOR RPA

The following table summarizes the key points to begin making your business case to senior management.



MAKING THE BUSINESS CASE FOR RPA

The following table summarizes the key points to begin making your business case to IT.



#4

DESIGN AND DEPLOY FIRST USE CASE

Deploy your first use case led by a small team before you roll out RPA across your organization.

You can start by implementing RPA in an area that is well understood and where you believe a strong business case can be built. If you don't know which processes to automate, your provider can help you identify the best business activities for RPA.

Forrester⁸ recommends designing RPA with your experts, as they know the ins and outs of how everything works. However, these IT experts may not be the best beta testers. After all, you want to make sure that the average employee in your organization can use RPA.

Forrester states, "...some enterprises suggest that the normal approach of taking the most senior production staff for RPA testing may not be the best. This group is the most experienced in the current process but the most offended by the replacement of tasks they have mastered."



RPA providers can help you determine your first use case. This is a low-risk approach to evaluate **potential RPA benefits** and better understand the gaps in your current presses that you want to automate.

#5 REPORT SUCCESS

Report on the results and success of your first use case to build interest in implementing RPA across your organization. Focusing on quick wins can help you get others on board. Show how RPA can give you a competitive advantage.

Also be prepared to address job security concerns on implementing RPA. Many employees might worry that robots will automate them out of a job. However, Forrester⁹ states that, “in some cases, RPA has led to creation of even higher-skilled positions.” According to Forrester, higher-value, knowledge-based workers are safe from redundancy at the moment.

According to Forbes, while workers might be concerned about their jobs being replaced by robots, new jobs are being created. Overcoming these objections is important as the impact to an IT team is actually minimal when automating business processes with RPA.



⁹ Forrester, The State of Robotic Process Automation, A Poor Man's Business Process Management, Or Possibly Something More, November 23, 2015

¹⁰ <https://www.forbes.com/sites/andrewarnold/2018/03/27/why-robots-will-not-take-over-human-jobs/#115137a592fd>

#6 DETERMINE YOUR FULL-SCALE ROLL OUT

Once you're satisfied with your first use case, you're ready to roll out RPA across your organization.

According to Deloitte,
only 3% of organizations
have scaled their
digital workforce.

RPA software offers ways to automate all or some stages of manual rule-based processes that were previously not automated – in a fraction of the time and cost of typical IT software deployments – while also minimizing disruptions to your operations and keeping your costs in check.

With RPA, you don't need to write code (unless you are using a less effective solution that requires programmers) or deal with application APIs in order to connect systems to your core business processes. RPA integrates with your existing systems, including legacy applications and business process management platforms. After your initial roll out succeeds, you can scale RPA to other business areas and processes.

For example, in a bank you might start by automating Know Your Customer (KYC) processes, and then later move to tackling inefficiencies within the consumer lending group. Consider how you can further leverage the power of RPA, especially in areas that require more advanced workflow orchestration.

Be sure to track and measure your process improvements to achieve maximum results.

If you lack a holistic view and metrics for your operations, it will be difficult to know if RPA is helping you meet your business objectives and to identify further opportunities to improve results.



BONUS STEP: UNDERSTAND AND ADOPT CHANGE MANAGEMENT BEST PRACTICES

“Businesses must help their employees prepare for this technological disruption by educating employees on the benefits, impacts, use and limitations of RPA.”¹¹

Most employees are resistant to change. The current way of doing things manually might be slowing your operations, but your teams are used to its pluses and minuses. The status quo becomes comfortable.

Here’s a quick checklist of 10 general best practices for managing changes to your business processes and overcoming resistance to RPA

- ◆ Provide early and consistent communication
- ◆ Iron out the kinks
- ◆ Time it right
- ◆ Make the change desirable.
- ◆ Make the benefits relevant
- ◆ Recruit help from within
- ◆ Monitor the change as it’s implemented
- ◆ Communicate the change on all levels
- ◆ Fully integrate the change
- ◆ Ease up the pressure

¹¹PwC, Managing the people and change aspects of implementing Robotic Process Automation (RPA) in the workforce, February 2016





KOFAX RPA IS THE FASTEST ROBOTIC PROCESS AUTOMATION PLATFORM

The Kofax RPA platform is the fastest and most efficient way to acquire, enhance, and deliver information from virtually any application or data source, including websites and portals, desktop applications, and enterprise systems, without any coding.

RPA lets you quickly build, deploy and manage automated robots that communicate bi-directionally across internal enterprise systems, web sites, web portals, desktop applications and other data sources, without requiring APIs and complex integration coding.

Its many business benefits are increased productivity, operational efficiency and a rapid ROI, powered by non-disruptive integration and automation technology that can be quickly implemented.



WHY CHOOSE KOFAX RPA?



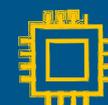
INTUITIVE NO-CODE DESIGN ENVIRONMENT

Simple for business analysts to use on their own, yet powerful enough for developers to tweak to their exact needs. The Kofax RPA single-screen design environment provides an interactive robot building experience where users can build, test and debug in real-time against live applications.



FLEXIBLE ACROSS MULTIPLE DATA SOURCES

Access web sites, portals, Excel files ,emails, PDFs, internal and external applications, web services, and multiple file types (XML, JSON, CSV).



REQUIRES LITTLE OR NO IT INTERVENTION

Kofax RPA works on top of your legacy applications not inside them, meaning you avoid the headaches off long IT-driven integrations and project plans. Just deploy the software and start building your robots.



ADDED CDA AND ANALYTICS FEATURES

Built-in cognitive document automation (CDA) applies machine learning and neural networks to fetch, understand, and integrate documents into your processes fast and accurately. Use analytics to monitor robots and review workflows, present findings with ready-made dashboards.



MOST SCALABLE, COST EFFECTIVE MODEL FOR THE ENTERPRISE

Working on server based architecture, rather than desktops, Kofax RPA scales easily without users needing to deploy multiple desktops. And because Kofax RPA is licensed by concurrent robots running simultaneously, not on a per robot basis, you'll never be limited by how much work you can do without adding new licenses.



DELIVERS FULL PROCESS AUTOMATION UNDER A SINGLE SOLUTION

RPA, BPM, and document capture together from a single vendor. Add Kofax TotalAgility (KTA) for a transformative program for onboarding, lending, claims processing, content migration, and more.



WHAT OUR CUSTOMERS SAY

“ We now have a virtual workforce working alongside our teams, handling repetitive tasks far faster than a human ever could. ”

JILL MARKS | General Manager of Business Transformation, [P&N Bank](#)



“ Our staff no longer have to go back and forth across multiple web pages to hunt down that data, Kofax RPA does all the hard work for them—and much faster than a person ever could. ”

COMPANY SPOKESPERSON | Transportation Provider

“ With the addition of Kofax RPA, we have digitized close to 95% of AP operations, and we are on track to go fully electronic by the end of 2017. ”

GLOBAL TELECOMMUNICATIONS PROVIDER | AP Shared [Services Director](#)



“ What sets Spotcap apart from a typical credit provider is the efficient way we can turn around a loan offer, and the robotic process automation capabilities that Kofax RPA delivers are key to enabling our quick and efficient service. ”

KARL SPONHOLZ | COO, [Spotcap](#)



NEXT STEPS



Learn more how Kofax RPA can build your digital workforce today, so you can Work Like Tomorrow. View more RPA customer success stories here.

For more information on how we can help make business as usual better for you and your customers with robotic process automation, contact us at info@kofax.com, call 1-949-727-1733. or visit [KOFAX.COM](https://www.kofax.com).

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