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How to Implement Intelligent Automation for Scale and Unlock its True Potential

By Babu Sivadasan, Co-founder & CEO

While task-based bots (RPA) cannot scale to address evolving business needs, an enterprise-grade intelligent automation platform can fuel dynamic growth.

The adoption of intelligent automation (IA) is helping businesses across the globe to strengthen their digital maturity, rein in costs, and reduce dependencies on manual processes. But that's only part of what IA can deliver. If all that an organization gains through IA involves cost savings, it is missing out on IA's full potential. In the post-pandemic world, as rapid scaling efficiency and business resilience become the main destinations on the technology roadmap, your organization needs agile business applications that can be assembled, reassembled and extended based on dynamic changes. IA will assume an even more critical role in this scenario.

To get the most from your IA implementation, broad-ranging transformation is needed, not just in a piecemeal way. Done right, it can enable your teams to innovate faster by delivering on the promise of true digital transformation.

This eBook delves into the foundational concepts of implementing and scaling intelligent automation on an integrated modular platform, and shares ideas that will help you to develop the best automation roadmap for your business, so you can achieve maximum ROI.

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The economic uncertainty of 2020 led organizations to reduce spending and to focus on operational efficiency. As a result, 73% of organizations across industries said in a Deloitte survey that they had embraced automation, compared to 58% in the previous year[1].

For these adopters, the benefits of automation speak for themselves—optimizing effort utilization for simple tasks, reducing errors/defect rates, and introducing standardization across business processes. Employees benefit from better use of their time on higher-level creative or innovative work; customers and partners benefit from more efficient services, such as easily accessible automated self-service or faster invoice processing.

However, a recent McKinsey study[2] revealed that while more companies are pursuing automation, there hasn't been a significant change in the share achieving success over the past two years. Just 61 percent of respondents said their companies have met their automation targets[3]. This makes it important to understand the factors that enable success in implementing automation in any enterprise. For many organizations, the lack of an integrated automation platform and the lack of automation visibility across the entire enterprise have been hampering the scaling of their automation projects. Adopting a strategic approach to ensure that the automations have a cognitive edge and are scalable for the future is pivotal for their sustenance from an ROI perspective.

Furthermore, to better deliver on new business opportunities, organizations need to be agile. They need to adapt and respond faster than ever to deliver innovation quickly and thereby get the most out of digital transformation. For that, they need business processes transformed into applications that can be assembled, reassembled and extended based on the need of the hour. They need to evolve from inflexible, monolithic applications toward a modular portfolio that is more adaptable to business changes triggered by continuous customer experiences.

They need an intelligent automation technology platform that is designed for change and enables the creation, curation and dynamic reassembly of what Gartner calls 'Packaged Business Capabilities (PBC)'[8]. But, this does not imply that organizations have to 'rip-and-replace' their existing technology architecture. Rather, they need to build on their automation framework and set it up for ongoing evolution.

> "Organizations that reimagine how they work, take advantage of a combination of human and machine workforces, and have the skills and knowledge to harness intelligent automation will be best placed to take advantage of the opportunities the technologies promise.
>
> **Justin Watson**
>
> Global Robotic and Intelligent Automation Leader, Deloitte

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Is Your Organization Ready for Intelligent Automation?

> We knew the first step was finding a partner who understands our complex business and needs, while also being on the same page with our process roadmap before we started talking about automation. As we examined effort-intensive process areas, we realized that the entire landscape of employee-driven operations—from trade notifications to corporate actions—had to change.

Randy Lambert
COO, Orion

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In the coming years, automation investments will continue to rise exponentially, but the margin for error will be extremely narrow as organizations face pressures to maximize the ROI from every cent spent. As of now, the number of organizations scaling their automation projects has nearly doubled since 2019[4]. Business leaders of these companies are looking towards intelligent automation (IA) projects that incorporate both rules-based automation and artificial intelligence-based automation. In an effort to move away from a piecemeal automation approach, they are in need of a single platform which can address all enterprise automation needs end-to-end, help them reduce technical debt, and enable them to escape the frustrations of bot fragility.

If you need to scale your automation implementation in tune with anticipated business growth in the emerging future, your implementation strategy must be informed by precise business requirements and process/technology assessment, and not just be built on hype. For that, the first step is to check whether your organization and business processes are ready to adopt and scale intelligent automation.

Here are the checklists to help you do that effectively:

Checklist 1

Identify and assess the right business processes for automation-readiness.

- **Are your processes defined?** If not, putting business processes into a structured framework (or partnering with a vendor who can do it for you) is a prerequisite. The right partner can also help you assess whether the processes *should* be automated.
- **Are your processes repetitive?** Infrequent processes are typically poor candidates for intelligent automation. It is best to prioritize commonly occurring processes such as payments, employee query resolution, or new hire onboarding to extract maximum value.
- **Are your processes digitized?** Ideally, some degree of digitization is a prerequisite for implementing business process automation. Otherwise, converting your processes to a digital format should be the first priority.

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Checklist 2

Take stock of your automation track record, if any, and gauge leadership attitudes.

- **Do you have prior experience in automating processes?** If yes, that is a good sign for your intelligent automation-readiness. But if you have little to no experience in automating enterprise business processes, that should be factored into your choice of an automation partner.

- **How do decision-makers feel about the ROI of automation?** If your leadership takes an optimistic stance, that's great! Getting leadership buy-in is a critical component for success, as is following change management practices before you kick off any initiatives. The big key to success is to clearly map out how you will measure and report on ROI.

- **Have you identified the right automation technology?** There are several routes available to automate processes—from basic rules-based, task-focused robotic process automation (RPA) to Artificial Intelligence-led integrated automation platforms that enable end-to-end complex enterprise process automation.

Getting Started: Choosing the Right Automation Approach

Based on the results of the checklists above, you are now ready to select an automation approach most suited for your organization. While RPA is generally considered the industry default, there are some serious issues plaguing that approach. Over and above the alarming volume of implementation failures, RPA has simply not scaled. Most organizations that have implemented RPA have not made it beyond a handful of business processes even after several years of toil. According to the Deloitte survey[7], organizations that have implemented RPA at a substantial scale (50 or more automated tasks) went from 3% to just 4% in a year.

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Here's why. RPA 'bots' bring in an additional layer of architecture into the technology stack – or technical debt – which requires governance by your busy, often overburdened IT team. Once configured, they aren't flexible enough to keep up with changes in the platforms on which they interact (typically referred to as "bot fragility"). Most of them rely on "screen scraping" or image recognition methods to automate information gathering tasks. However, the IT landscapes of large enterprises are highly complex and business processes are constantly evolving. Even a small change made to the UI, APIs or data transposition could potentially interrupt the bots' functionality. This breakdown in automation can cause downtime and lost business value with the potential for additional technical resources.

Moreover, companies that have implemented RPA have typically taken a siloed approach by automating individual tasks inside individual systems without being able to logically bring these automations together into an end-to-end business process. For instance, more than one-third of the companies that participated in a survey to assess the progress of the IA journey held by KPMG International[6] and HFS Research indicated their primary focus right now is on one element of IA technology. Only 11 percent noted they are leveraging the power of all three technologies under the IA umbrella: automation, analytics and artificial intelligence.

On the other hand, there is the larger problem of the IT-business divide that causes the failure of most digital transformation projects. Loaded with their own strategic prerogatives, more often than not, IT overlooks the business users' perspectives as it builds the best future-focused technology infrastructure for the organization. Whereas the business users are not able to convey what they really need to IT. This results in disparities in expectations.

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Adding the Dimension of Intelligence to Accelerate Your Automation Strategy

According to the results of the KPMG-HFS survey, 71% of respondents believe that their function-level IA programs are deemed to either be at scale or will be there within a year. Clearly, your goal is not to replace manual efforts and only unlock "quick-win" savings, but to set a sustainable automation engine in motion that continues to garner value by making processes more efficient, easier-to-use, and user-centric with time.

RPA is the first stop along the path to intelligent automation. Business leaders aiming for a comprehensive digital transformation have to break down functional and process silos, and augment enterprise processes by combining complementary tools and technologies such as machine learning (ML), natural language processing (NLP), and intelligent document processing (IDP) that deliver end-to-end business process automation.

In fact, you need both process automation and logic modeling tools to achieve this end. Your operations teams need bots that can automate the redundant and costly manual work, and your business teams need low-code/no-code and cloud-native modeling tools that allow them to handle new information and modify how they react to it on-the-fly. More importantly, their models need to 'evolve' based on past experiences and begin to handle emerging situations automatically.

An integrated intelligent automation platform can give you all that and much more. It includes powerful data modeling tools, a business language, business rules, and the ability to leverage machine learning that can emulate the intelligence of prior human responses without intervention. It can be easily deployed as APIs that can integrate with RPA or other production systems in real-time.

Orion Saves Thousands of Person-hours

The US-based financial services and solutions provider was able to save thousands of person-hours annually using just two automations built on JIFFY.ai's intelligent automation platform—handling crucial tasks like redemption request processing and monthly statement creation.

Read case study

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The Impact of Scale: How a Modular, Integrated IA Platform Helps Fuel Business Growth

> JIFFY.ai has the ability to process complex PDFs, work with legacy systems, comply with our software security needs, and is a good partner.
>
> **RPA Manager**
>
> Leading US Airline

An integrated intelligent automation platform can help scale your back-office operations and bring several significant benefits such as greater process and workforce efficiency, lower demand for manual activities, higher revenue (by refocusing employees on high-value activities), and higher customer satisfaction. The most important benefits are:

- **Stronger workload efficiency** - IA platform supports significantly higher volume of processes and tasks; its modular nature allows citizen users to easily effect changes in business rules without involving IT support or code changes.
- **Wider scope of usage** - Enables you to broaden the purview of automation in the organization. For example, you can start by automating a process in one part of your business, and then expand by recreating similar automations for processes in other units with minimal effort.
- **Faster service** - Streamlined processes and automated routine tasks make it possible to complete activities—which previously took days—within minutes.
- **Higher flexibility** - Automated processes can operate 24/7 and scale up or down with demand, further increasing operational efficiency and flexibility.
- **Stronger insights** - Intelligent automation—powered by machine learning and artificial intelligence—can generate, capture and add data, and generate important insights.
- **Lower costs** - As technology takes over most of the repetitive manual tasks, effort and risk decrease and accuracy improves.
- **Broader access** - IA enables automated processes to access and interact seamlessly with newer and wider variety of technologies.

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JIFFY.ai Intelligent Automation Platform: Built for Scale

JIFFY.ai's intelligent automation platform helps you move away from a fragmented approach to automation. Its simple design studio gives your business users the power to quickly build apps that solve real-world business challenges with **just three mouse clicks**.

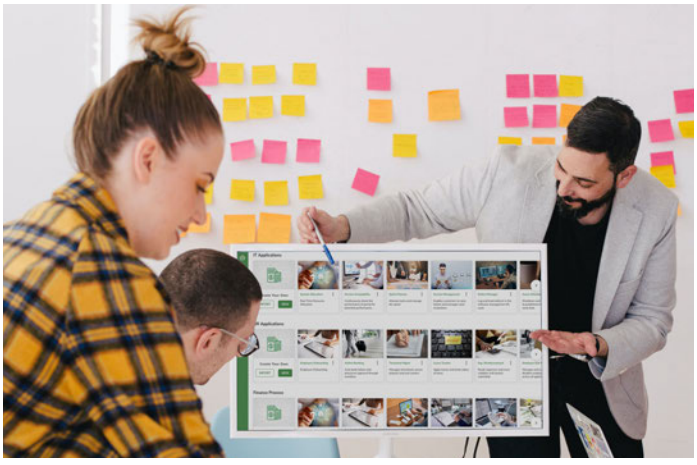
Our capability driven framework offers tools to assemble simple tasks using a Lego building block approach. Business users can add levels of complexity based on your business requirements. This enables non-technical employees to create autonomous enterprise solutions with minimal IT involvement.

Our intelligent platform manages your most complex business processes and workflows with the help of optical character recognition, intelligent document processing, natural language processing, robotic process automation, machine learning, artificial intelligence, and deep business analytics.

You don't have to worry about external tools to manage your automation requirements — everything is handled on the single modular platform with a drag-drop designer, extensible task library and a web-based application framework. No more stitching together multiple technologies and no more maintenance concerns or scalability worries – JIFFY.ai's platform is cloud-native, completely configurable, and easy to maintain.

While hyperautomation (term coined by Gartner; a trending approach to automation adoption) expands automation capability with tools and technologies that amplify the ability to automate work, JIFFY.ai's HyperApps, built on the intelligent automation platform, are evolved on that front already. HyperApps are pre-packaged, end-to-end automation applications that use modular components, cognitive technology, and business-user-ready interfaces. They make automations easier to implement, run, and adapt for each of your evolving business processes.

A common starting point for enterprise autonomy, HyperApps offer the potential for significant cost savings and efficiency gains via closed loop end-to-end process automation. The intelligent automation platform that powers them helps you to elevate customer experience and unleash data to drive digital transformation, while reducing technical debt and total cost of ownership.



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> JIFFY.ai is in our cloud and is very efficient. It speeds up the very time consuming, repetitive work, which would have taken up a lot of our time, if it was not automated. It is a one-stop solution for automating processes. The modular way that is assigned and works together follows a certain logic, and it encompasses a wide range of processes in a very structured and logical manner.
>
> **Johnson Mah** - National Professional Officer at an international affairs institute

Through our experience working with innovators across multiple industries, we know that a clearly articulated strategy for the various phases of process automation is half the battle won. And the initial steps towards building that strategy include assessing your process landscape carefully, preparing the foundation, estimating real value, and choosing an automation partner that offers a scalable, self-sustainable intelligent automation platform which can align with your business growth requirements.

Customer Success Stories

- Helped **a global bank** to process over **200,000 Know Your Customer (KYC)/Customer Identification Program (CIP)** documents **90% faster** and more efficiently with our intelligent automation platform.
- Enabled a **top automaker** to automate finance and accounting processes and achieve **85% straight-through processing** across a volume of **150,000 invoices** per month for over **5,000 suppliers**. With operational **cost savings of ~70%**, they achieved **ROI in 6 months** flat.
- Implemented end-to-end automation to help a **US retailer** manage order capture to fulfillment, warehouse, refunds, and call center. They realized **65% cost savings** totaling **$1.3 million** and saved thousands of dollars worth of manual work.
- Automated the business operations of a **major US airline** and helped them achieve **operational cost savings** of more than **70%, around $2.1m**.

Read more

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Founded with the mission to radically change how enterprises achieve autonomy by automating complex business processes, JIFFY.ai's intelligent automation platform empowers business users to adapt to change and innovate faster. The integrated platform employs the cognitive capabilities of no-code based software development, intelligent document processing, natural language processing, RPA, Machine Learning, and Artificial Intelligence along with an overarching human-in-the-loop approach to power the next generation of enterprise applications. Built on this platform, JIFFY.ai's HyperApps (as-a-service) are pre-packaged automation applications that can be extended across the enterprise to accelerate end-to-end automation. Fortune Global 500 and Big4 consulting companies, and global leaders across various industries have been using JIFFY.ai's platform to achieve operational excellence, improve customer experience, and realize the true value of digital transformation. Learn more at www.jiffy.ai.

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If you are looking to iron out bottlenecks in your business processes sustainably, please email us at marketing@jiffy.ai and our intelligent automation experts will be happy to help you accelerate.

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