

Establishing Scalable RPA/IA-Support Entities

BRMi's Approach to Supporting Rapid Adoption of Intelligent Automation Capability

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Every organization bases their delivery of services on one or more processes. Most of these processes are supported by human employees who are typically the organization's most valuable and most costly resources.

It's now possible to increase the speed and accuracy of many employeesupported processes using robotic process automation (RPA) and other intelligent automation (IA) capabilities. Successful RPA/IA implementations enable allocation of employees into roles that provide greater value.

Proper preparation is needed to successfully introduce RPA/IA capability into an organization and continued expansion across the organization's service delivery processes. Preparation steps include

- readying your organization to adopt this capability (organizational readiness¹),
- selecting the right processes to automate, and
- providing support services that can scale as adoption evolves.

This paper conveys the reasons why

CONTENTS

RPA/IA-Support Service Structure 1				
Integration and Scale1				
RPA/IA Service Collection2				
Community of Practice Synopsis3				
Oversight and DevSecOps Lab Synopsis4				
Shared Service Provider Synopsis5				
Taking a Strategic View 6				
BRMi's Solution Expertise7				

your RPA/IA implementation strategies should include creating a progressively expanding support capability and how to structure support services for maximum benefit. This paper also describes

- BRMi's support service concepts;
- how BRMi's approach will save time and capital by providing a shared learning, planning, oversight, and acquisition environment that augments existing management functions; and
- logical collections of services and oversight that support rapid adoption of RPA/IA capabilities.

RPA/IA-Support Service Structure

Integration and Scale

The purpose of providing support services and oversight is to facilitate the smooth *transition* of RPA/IA tools into the organization's culture and technical platforms while maintaining compliance with organizational

¹ Additional details on organizational readiness may be found in BRMi's *Organizational Readiness for Implementing Intelligent Automation* whitepaper.

controls. RPA/IA implementations will need to be coordinated across multiple organizational functions—human resources, mission service delivery owners, finance, acquisition, information technology, and security and should be supported by teams that already have expertise in these functional areas.

Most organizations already have an enterprise support entity with functional responsibility for introducing new service delivery methods and technologies. They are frequently embedded in the information technology organization. They may be labeled program or project management offices (PMO), centers of excellence (CoE), or something similar.

The Benefits of a Support Entity

Support entities help organizations to avoid spending time on independent, avoid duplicative research and false starts, maximize existing contracts, consolidate licensing, and standardize technical and security implementations.

Therefore, integrating RPA/IA support functions with the organization's existing support entity provides maximum efficiency and integration with existing organizational controls.

Care must be taken to avoid duplicating management responsibilities across multiple support entities because that approach may introduce potentially undesirable consequences. These may include duplication of human, financial, and contractual resources and failure to comply with technical and security requirements. These consequences may delay or derail achieving potential or expected benefits as RPA/IA implementations scale.

The level of services needed by the support entity will *incrementally expand* with the volume of RPA/IA implementations and *then ultimately contract* as the need diminishes. This is the common support life cycle for implementing any new capability. A progressively expanding support entity enables organizations to *start small* and *be agile* to deliver highvalue outcomes quickly and expand as the organization evolves.

Establishing support for RPA/IA initiatives early on facilitates orderly adoption across mission delivery organizations and speed proliferation of the value. It helps avoid independent, unstructured implementations of multiple tools and unmet expectations—complications that may disrupt adoption in the absence of an enterprise support capability.

A support entity can have many different configurations and purposes depending on the stakeholders' goals and the level of maturity. The key is to address the gaps identified in an organizational readiness assessment by implementing the requisite support services.

RPA/IA Service Collection

The support concept is simple: the level of services and oversight needed will evolve as adoption of a new service delivery method or technology increases. The recommended approach is to provide only the services and oversight that is needed at any given level of adoption and to maintain awareness of progress so that additional support capability may be quickly implemented when conditions warrant. Table 1 identifies key support attributes that should be provided as adoption evolves. They are structured by strategic resource into three collections of logically grouped services: (1) community of practice, (2) oversight and DevSecOps lab, and (3) shared service provider. Details about the services are provided in the synopsis for each service collection.

		Community of Practice	Oversight and DevSecOps Lab	Shared Service Provider
Strategic Resources	Attributes Addressed	Grouped Service Collection		
People	Organization	\checkmark	~	~
	Roles and Responsibilities	\checkmark	\checkmark	~
	Training	~	~	~
	Change Management		ž	~
Process	Knowledge Sharing (Best Practices, etc.)	~	~	~
	Use Case Definition Methodology	~	~	~
	Business Case and ROI Methodology		×	~
	Security/ATO Methodology		ž	~
	SLAs			*
	Project Prioritizing and Intake		ž	~
	Project Management		ž	~
	Task/Process Streamlining Methodologies		ž	~
	Performance Metrics and Reporting			ž
	Budgeting		ž	~
Controls	Policies	~	\checkmark	~
	Procedures and Templates	✓	 	~
	Standards	 ✓ 	 	~
	License Management		ž	~
Technology	Design and Develop Procedures		響	~
	Maintain Lab Environment and Licenses		ž	~
	Developer Support			Ť
	Library of Reusable Components			ř.

Table 1: Common RPA/IA Implementation Support Services

 \checkmark Existing service in the collection, $\stackrel{\star}{\simeq}$ New service in the collection

Community of Practice Synopsis

The community of practice, or "CoP,"

supports the initial implementation of several key change management



attributes² that speed adoption of new processes and tools. The CoP serves as a knowledge repository where the entities that are interested in exploring RPA/IA may obtain and share information about any of the facets of a successful implementation. These may include process analysis and optimization, research on software products, lessons learned from other internal or external implementations, licensing agreements and service contracts, organizational policies and procedures, and so on.

The CoP is intended to facilitate business unit collaboration on like processes and technologies. It provides a platform for sharing, collaborating, and learning together. Every organization should provide this minimal level of support to avoid unnecessary overlap and duplication of effort.

The CoP supports organizational readiness efforts and may evolve to provide progressively greater preparation, planning, oversight, and implementation services within the other service collections.

Minimal staff time is required to support a structured CoP. Some CoPs may be self-organizing; formal recognition of the CoP organization further enhances visibility and illustrates management support for a collaborative approach. CoP members' roles should be defined for maximum efficiency and value. Access to existing IT management policies, procedures, and standards should be structured so that they are easy to locate and retrieve. Practitioners may come together regularly to address questions and develop material that will assist others.

Oversight and DevSecOps Lab Synopsis

The oversight and DevSecOps laboratory collection of services expands on the culture and management control attributes in the previous collection. It builds on the CoP foundation by providing additional structure to support people, process, control, and technology resources. Additional services in this collection include the following:

- A more formal organizational change management capability. RPA/IA tools can unnerve employees with notions of their replacement. On the contrary, organizations usually reallocate their human resources to strategic and customer-facing roles. An organizational change management plan will establish processes for end-user and IT involvement, updating policies and procedures, education, adoption, and ongoing support.
- Adjusting existing IT management processes for RPA/IA implementations to support an increased volume of activity. The team should place attention on developing standard business case and ROI metric criteria to enable an equal comparison of proposed projects and budget requests.

² See BRMi's Organizational Readiness Actions for Successful Implementation of Intelligent Automation whitepaper for more information on the attributes.



Existing project management methods should be updated to realize the rapid development and implementation potential that these technologies offer.

- An intake process to provide structure for initiating RPA/IA projects. These may include procedures for: submitting RPA/IA requests; gathering high-level requirements; prioritizing projects; and scheduling projects within the DevSecOps lab.
- Developing standard task/process analysis and streamlining methodologies to guide improvements prior to automating them.
- Developing methodology and guidelines for meeting security and privacy requirements and obtaining authority to operate (ATO) approvals.
- Overseeing use of process management and RPA/IA tool contracts to achieve maximum efficiency.
- *Creating a shared prototype design and development lab* to enable reuse of prior learning about configuring and deploying the technology in one's infrastructure. The lab
 - is an environment to pilot and mature automation technology applications by providing tools, licenses, and subject matter expertise to support project implementations and tool

maintenance.

- develops functional prototypes to demonstrate the potential of emerging automation technologies to win stakeholders' buyin and funding support.
- is designed to achieve excellence by accelerating the adoption of RPA/IA capability.

Full-time staffing is warranted to support a shared oversight and DevSecOps lab that will be used by virtually every implementation. Staff will support all the CoP functions and ensure that technical implementations are consistent with organizational standards and comply with ATO criteria.

Shared Service Provider Synopsis

The services represented here reflect an organization that provides the full range of RPA/IA services for the enterprise or perhaps a broader community.

The shared service provider supports all the functions in the preceding collections and provides end-to-end RPA/IA project services. Staff may be authorized to create and enforce standards. The design of this approach provides maximum efficiency, quality, and speed by applying the same principles and practices across all projects. Additional services in this collection include the following:

• Development and execution of service-level agreements for providing services internally and to external customers.

- Bot operations and maintenance functions, including:
 - Reporting
 - Monitoring
 - o Sunsetting
 - o Metrics
 - Proactive bot maintenance and system development life cycle monitoring
 - Change control
 - Environment/deployment rules
 - ATO recertification
- Ensuring that project teams follow established implementation guidelines and providing project management support for the implementation process, as well as assigning staff to execute the projects.
- *Full license management* for the RPA/IA tools, including:
 - Procuring licenses
 - Managing and controlling license keys
 - Optimizing use of licenses and scaling bandwidth
- *Maximizing use of common code components* across applications to reduce development time and cost.
- Financial and contract management—participation in oversight of financial and contract management, including:

- RFI, RFP development and evaluation
- Contractor onboarding and off-boarding
- Invoice review/approval
- Spend tracking

The organization should deploy full time, trained staff and expert contractors. The team may be tasked with developing new capabilities in conjunction with business owners to obtain quick results.

Taking a Strategic View

Successful implementation of new service delivery methods and technologies requires organizational preparation and support. Organizations should create a strategic view of the support requirements for implementing RPA/IA tools over the entire implementation life cycle and integrate the requirements with any existing enterprise service delivery support entity. This approach will

- leverage existing expertise,
- provide maximum efficiency and integration with existing organizational controls, and
- avoid potentially undesirable consequences that may delay or derail achieving benefits as RPA/IA implementations scale.

The services needed from a support entity will evolve as RPA/IA capability is initially introduced and subsequently spreads across the organization. Services needed to support this evolutionary path may be grouped into collections that are



linked to the strategic resources of people, process, controls, and technology.

Services provided by the support entity will *incrementally expand* with the volume of RPA/IA implementations and *then ultimately contract* as the need diminishes. A progressively expanding support entity enables organizations to *start small* and *be agile* to deliver highvalue outcomes quickly and expand as the organization evolves.

BRMi's Solution Expertise

BRMi has extensive experience in shaping and supporting process improvement initiatives and information technology management functions.

BRMi's approach begins with evaluating your agency/company's existing resources, organizational structure, and strategic goals. The information is used to design support entity functions that provide only the services and oversight needed at any given level of adoption. Our approach accelerates the adoption of RPA/IA within your organization without disrupting already established functions and authorities.

We have 15 years' experience supporting large and small federal agencies and commercial enterprises. Our end-to-end information technology services are based on a comprehensive framework to accelerate and optimize digital transformation. From strategy, planning, architecting, and investing to process analysis/streamlining, workforce development, and application development, BRMi is your one-stop for delivering wholistic solutions to today's complex problems.

Let's talk more about facilitating adoption and rapid results from implementing RPA/IA across your organization.

Ask us about scheduling an introductory meeting!



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