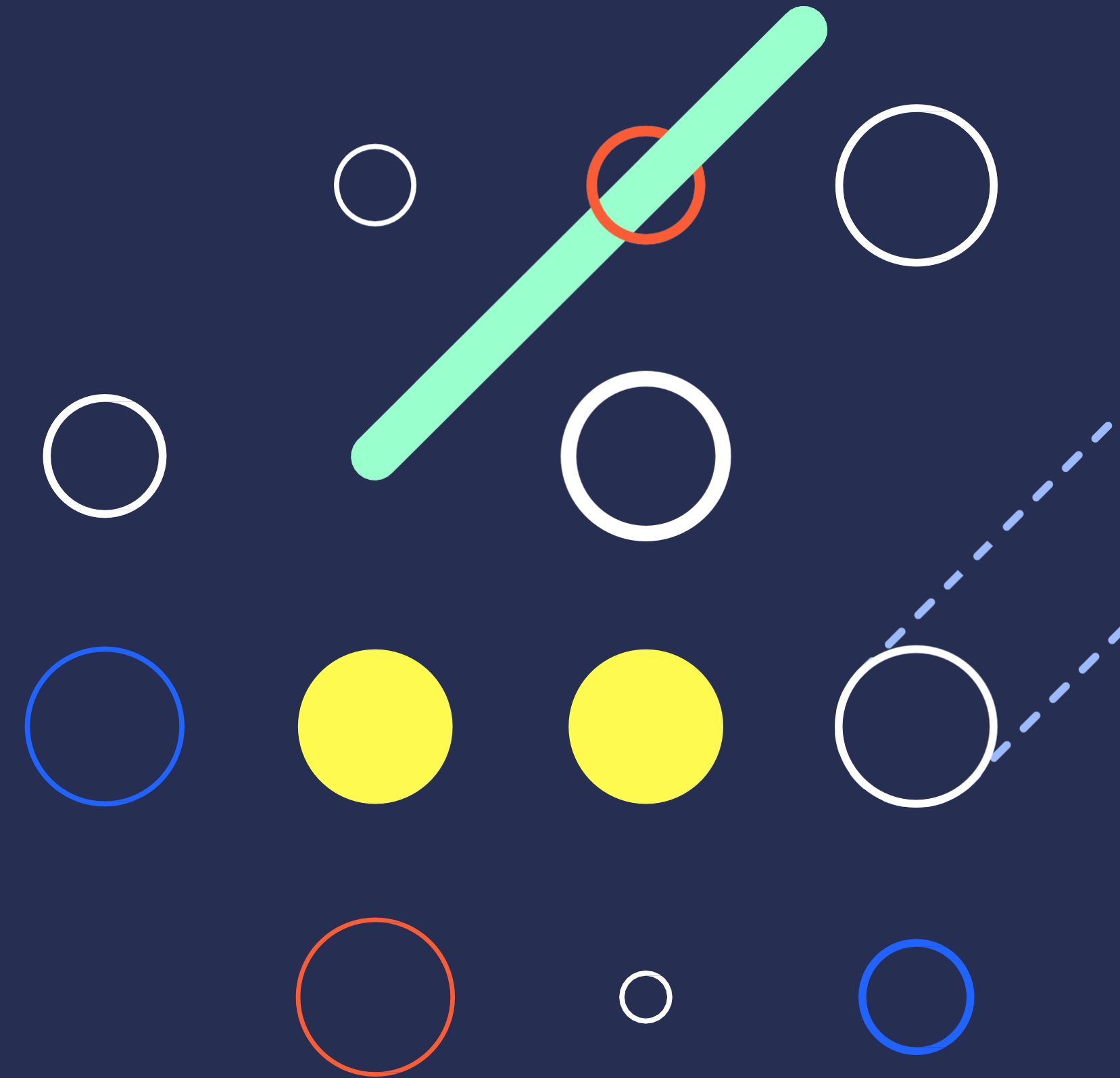# EQUANTIIS

Implementing RPA for Clearing with UEL

University of East London

Webinar

July 2021

Our Speakers

Alistair Sergeant

CEO, Equantiis

Janine Chasmer

Executive Consultant,
Product Manager, Equantiis

Donald McLeod

Director of Change and
Transformation, UEL

Context

Reimagine the nature of higher education

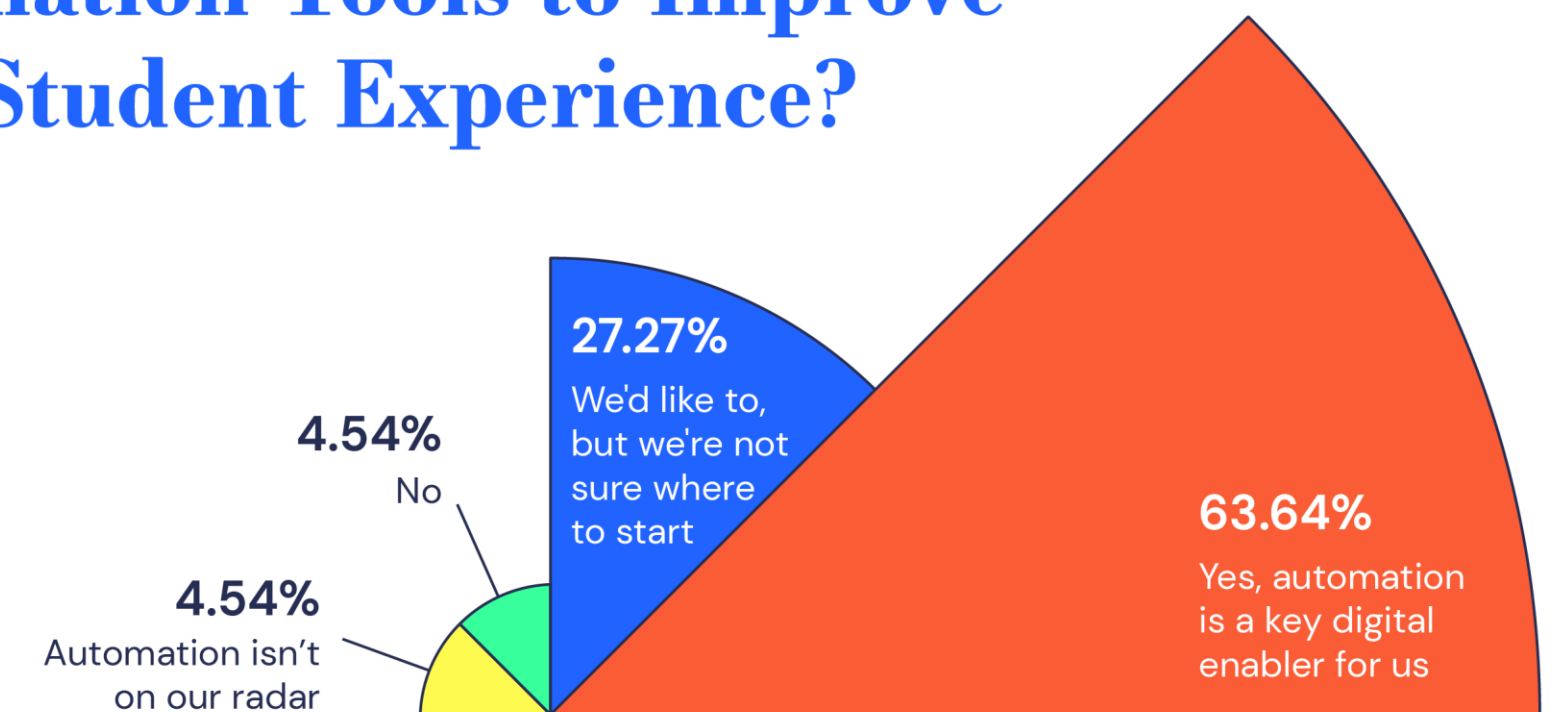To deliver true student-centric services

Adopt a digital approach across the whole organisation that empowers efficient operations and the joined-up student experience every institution aspires to achieve

Many parts of your organisation are lagging way behind on this digital journey

Your People, Processes and Technologies are simply not joined up and are holding you back..

EQUANTiiS

Are You Actively Looking at Automation Tools to Improve Your Student Experience?

27.27%
We'd like to, but we're not sure where to start

4.54%
No

4.54%
Automation isn't on our radar

63.64%
Yes, automation is a key digital enabler for us

This Session

Focuses on the challenges of the rapid shift to a digital-first model and what you can do to maximise the potential aligning your student experience and digital technology

The good news is

- Many tools and techniques you can use to join up the student journey without having to embark on major change programmes and complex IT projects.

- Definite shift in recent years away from big, long lead time IT transformation projects to smaller scale, "quick win" solutions

Addressing the Challenges

The modern HE institution must have a well-defined digital strategy

Offering a connected digital experience with both staff and students is a challenge – there's no 'one size fits all' approach
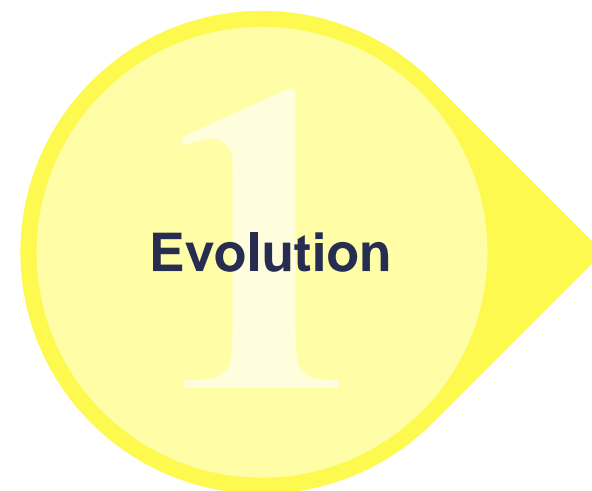
Common and consistent challenges across the sector:

- Student Expectations
- Legacy Systems and Siloed Data
- The Pace of Digital Change
- Staying Relevant
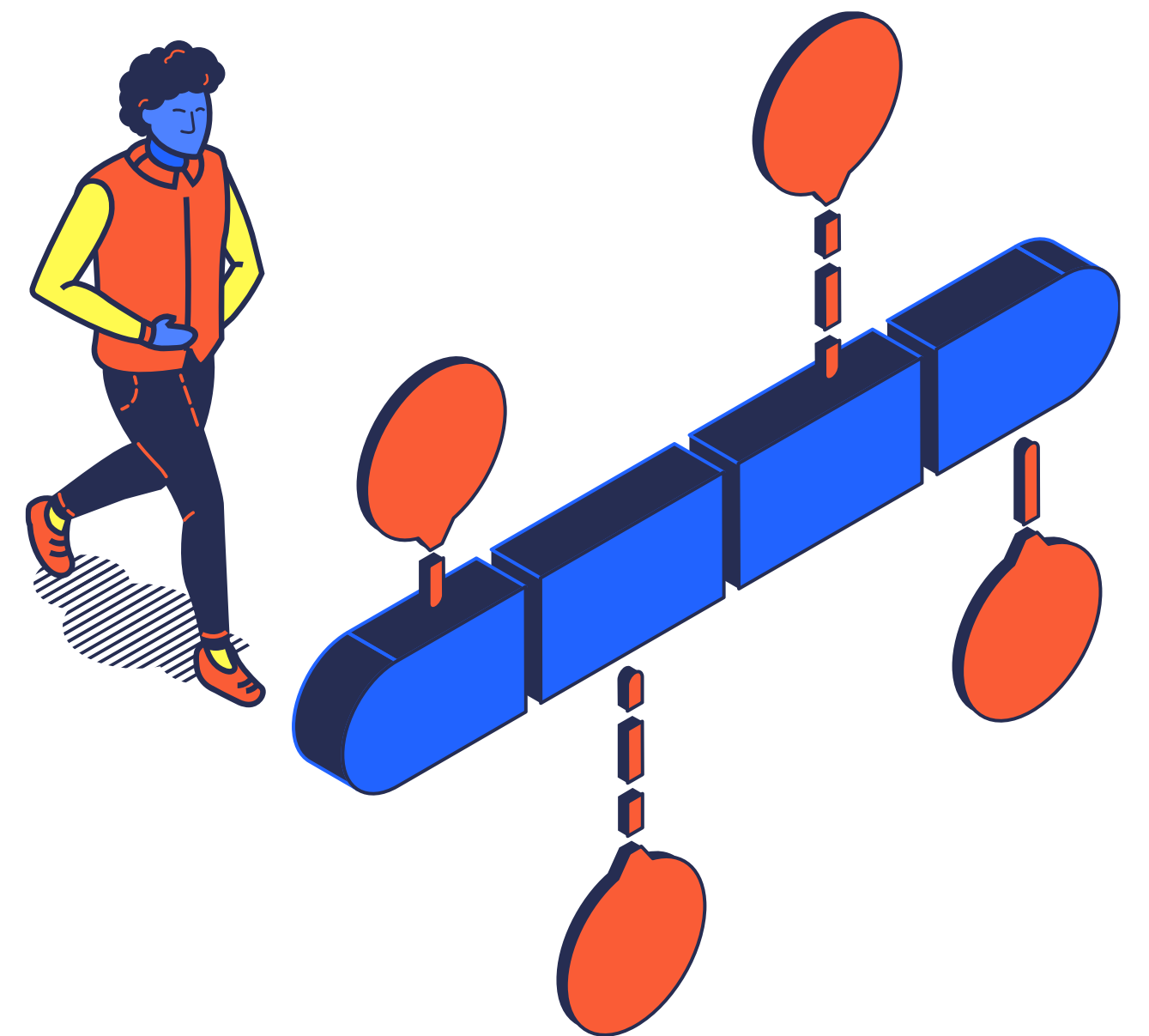
Taking a Digital-First Approach?

The Digital Maturity Journey

1 Evolution

Change happens organically

2 Transition

Change through digital projects

3 Transformation

Organisation wide change

Analogue by Design

Digital by Design

The External View: Student Experience Mapping

A practical approach to align stakeholders and departments around a shared vision

- Enables focus on Personas who represent key demographics – potential and existing

- Identifies the needs and aspirations of your applicants and students

- Highlights the touchpoints of interaction with your institution

- Identifies barriers or pitfalls

- Identifies where the experience is good, and students are engaged

- Pinpoints the opportunities to achieving digital transition

The External View

Student Experience Mapping

Prompt to Register

Read email notification:
"What do I need to do?"

Enrolling

Make selection:
"What can I choose? I can't find what I need"

Make a payment:
"Has my loan come through yet?"

Completing Registration

Confirmation of choices received:
"Great, I know I'm registered – but do I need to do anything else?"
"Do I get a new student card?"

The Internal View: Business Process Discovery

A key part of the optimisation approach is to engineer business processes to become more efficient and support a better student experience

The potential improvements can be estimated as operational efficiency savings as an average percentage and can be shown in two parts:
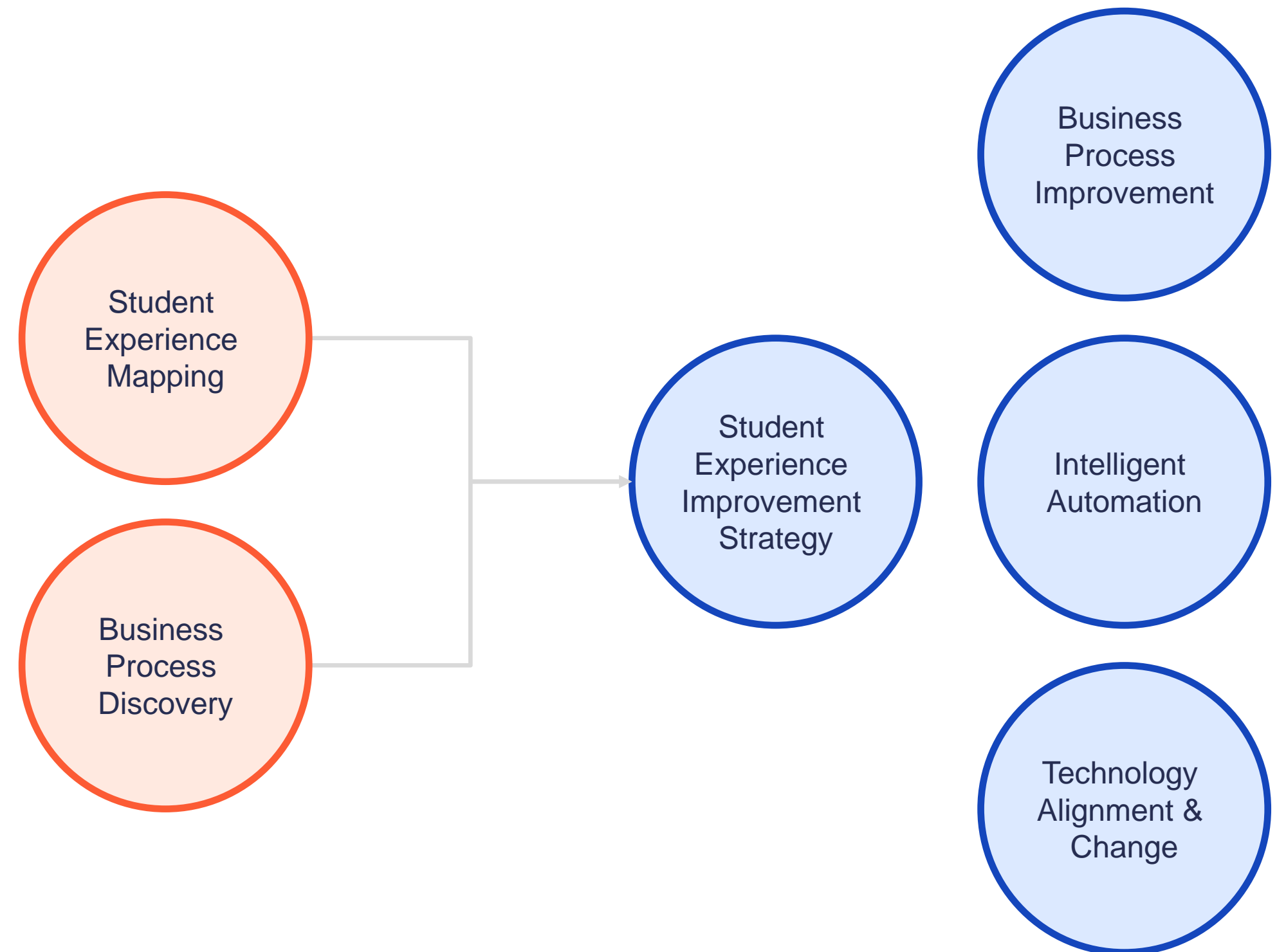
Process opportunity

Technology opportunity

Admissions	Registry	Student Services	Student Finance	Marketing	Graduates & Alumni
8 Business Processes	11 Business Processes	12 Business Processes	13 Business Processes	14 Business Processes	13 Business Processes
Process Opportunities 31%	Process Opportunities 52%	Process Opportunities 46%	Process Opportunities 30%	Process Opportunities 49%	Process Opportunities 13%
Automation Opportunities 34%	Automation Opportunities 45%	Automation Opportunities 46%	Automation Opportunities 22%	Automation Opportunities 54%	Automation Opportunities 12%

Joining up the Student Experience

By looking at the external Student Experience and the Internal Processes you can quickly gain an understanding of the right approach to improve the student experience as well as internal operational efficiencies

Student Experience Mapping

Business Process Discovery

Student Experience Improvement Strategy

Business Process Improvement

Intelligent Automation

Technology Alignment & Change

What is Intelligent Automation?

Intelligent Automation fast tracks your digital transformation:
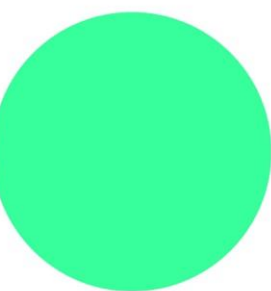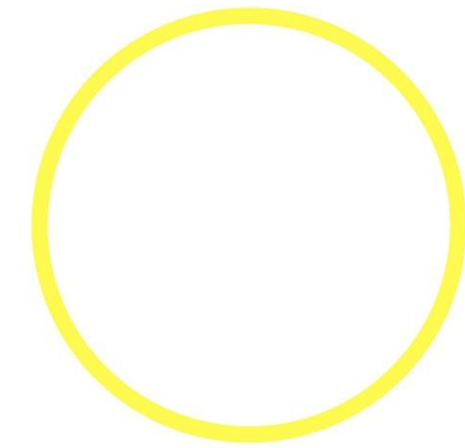
- The main component is RPA
- RPA stands for Robotic Process Automation
- RPA is a computer programme (called a bot) that mimics a human performing a repetitive rule-based task
- It can work across functions and software applications, and it can make decisions
- It is simple to deploy and does not required complicated IT integrations to work
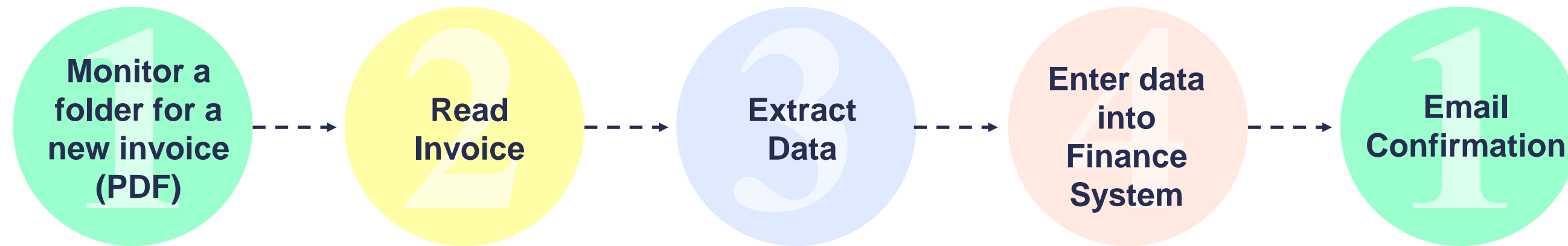
Just like a human it can:

- Log into systems
- Open emails and attachments
- Monitor folders for new files
- Perform queries
- Extract and process data
- Edit and move files
- Copy and paste text
- Fill in forms
- Follow if/then rules
- Maintain records

Benefits:

- Faster and more accurate
- Better student experience
- Improved efficiency
- Increased compliance
- Happier and more productive employees
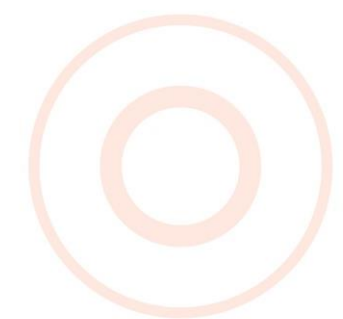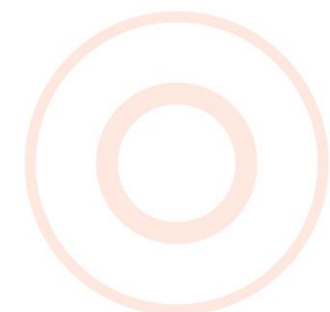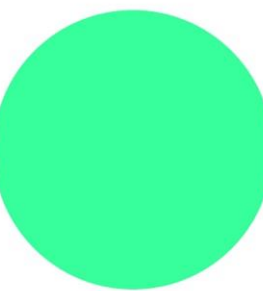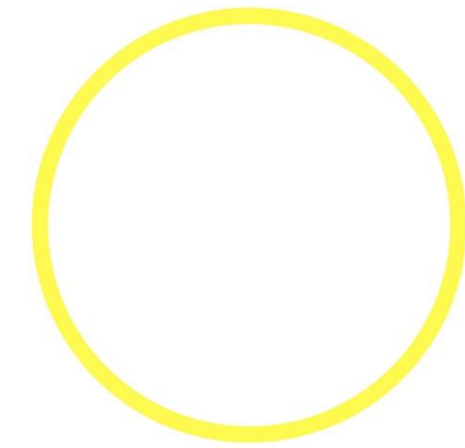
RPA Example: Invoice Processing

Monitor a folder for a new invoice (PDF) → Read Invoice → Extract Data → Enter data into Finance System → Email Confirmation

Intelligent Automation

What makes RPA a Success?

- Have related projects on the radar as they may affect them
- Product ownership
- Invest staff time into the project
- Change management on the radar
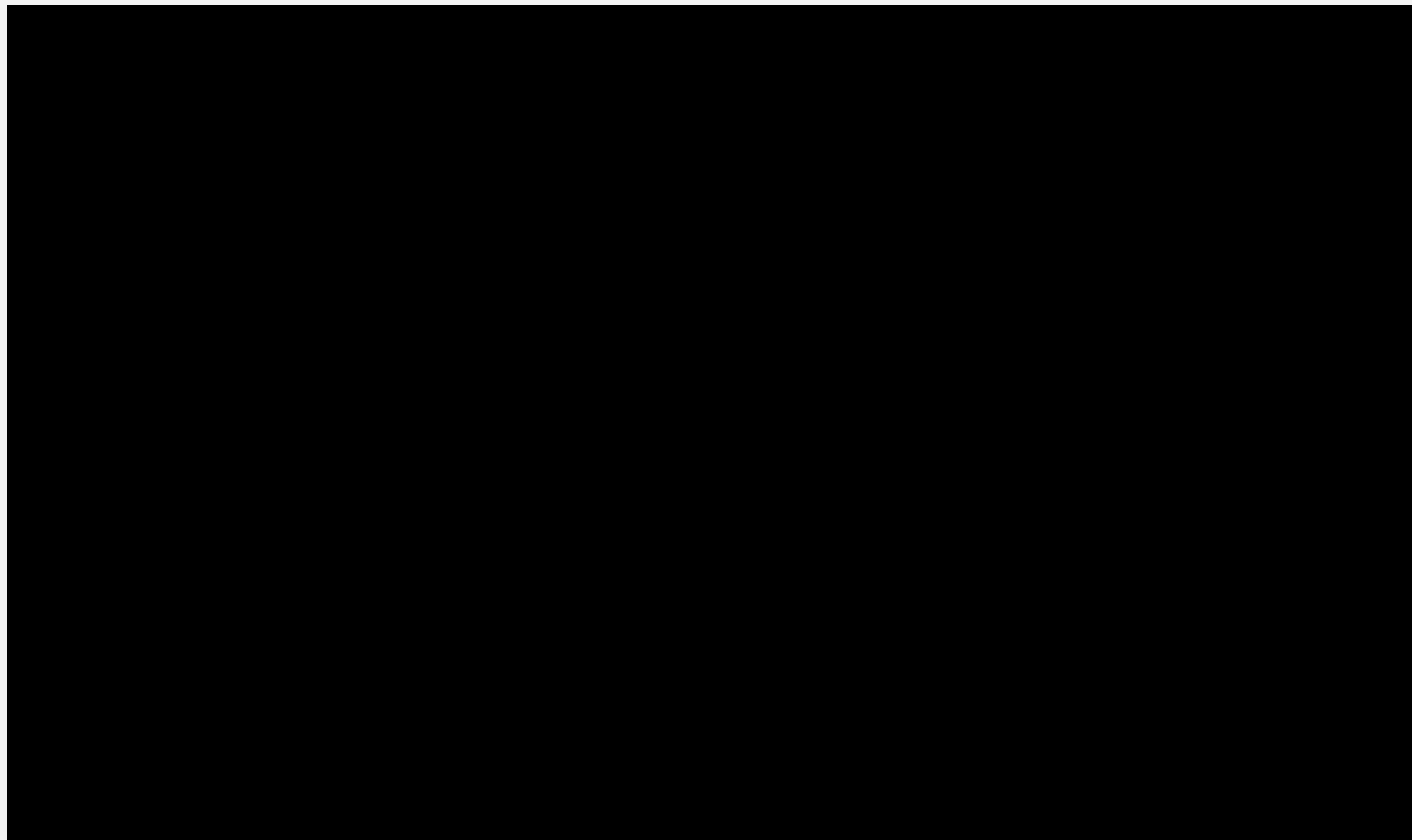
Case Study: University of East London

With Donald McLeod, Director of Change and Transformation (Digital) at University of East London

UEL Success Story

- UEL Transformation
- Pain points
- Resolving the issues
- Implementation
- Human Investment
- Changes/improvements

Niico in action

Example HE Processes That Can Be Automated

Managing prospective student offer letters

Processing student enrolment including data capture and confirmation

Assessing scholarships and bursaries

Processing student transfers and changes

Responding to student transcript requests

Intelligent Automation works best supporting any of the following scenarios:

Manual Repetitive Rules-based Processes

High Transaction Volumes

Multiple Systems & Data Sources

Structured Data

In Summary

- As society continues to rethink the value of post-secondary education, accelerated by the changes from COVID-19, institutions are responding by emphasising their value via increasingly joined up, flexible ways to prepare students for the workplace.

- It's critical that your digital capabilities are unified and are focused to help your institution rethink and achieve this direction.

- As a large institution, key to make digital transitions efficiently and effectively, operating with a lean business approach where pivoting and responding to change is easier

- Technology such as artificial intelligence, intelligent automation, blockchain and advanced analytics can all change the way in which services are delivered to students.

- The most successful institutions have implemented a unified view of their organisations capabilities that aligns initiatives, investments, and strategy in order to compete and engage the student to achieve their best possible potential.
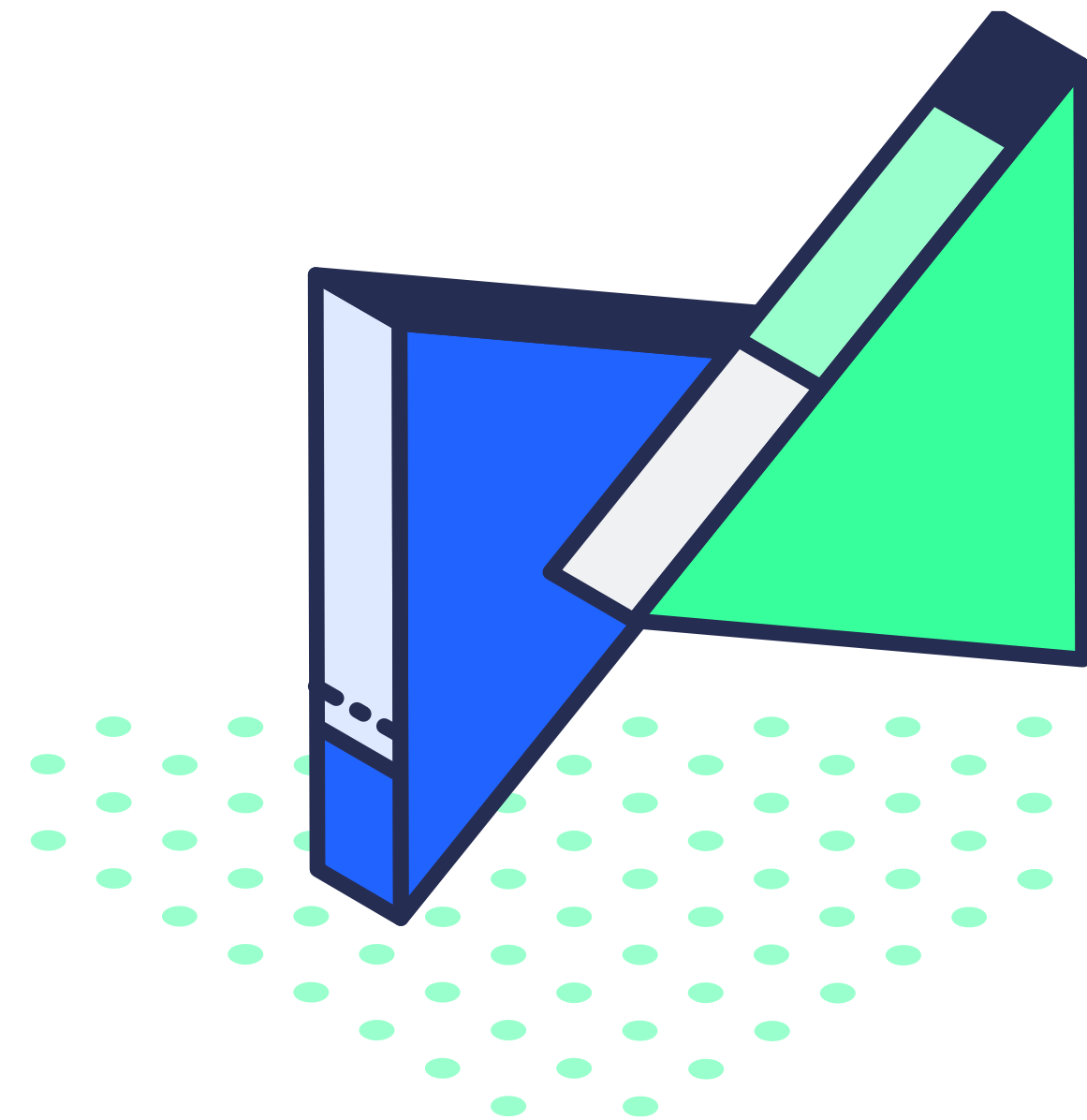
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