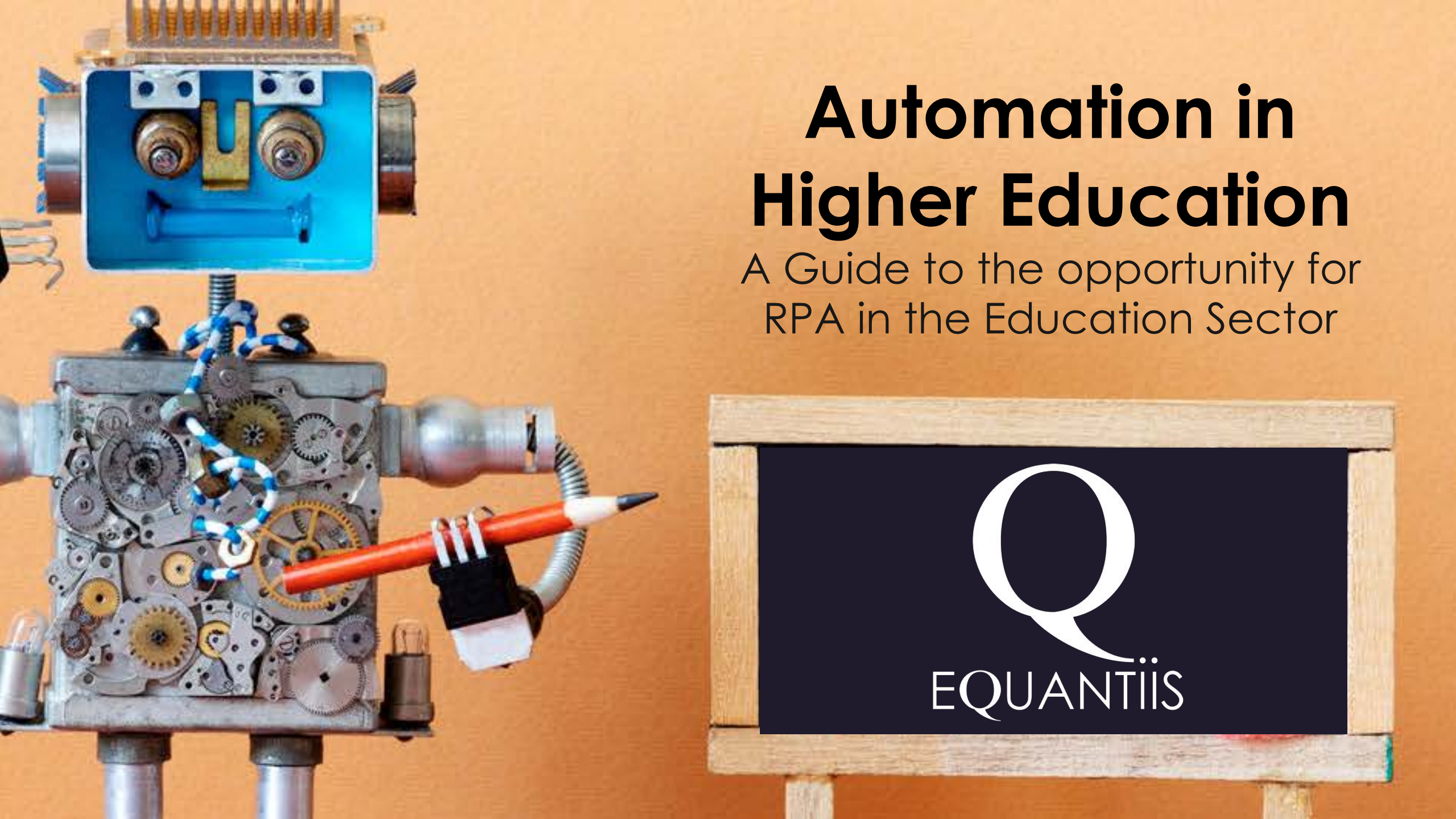


Automation in Higher Education

A Guide to the opportunity for RPA in the Education Sector

EQUANTiiS

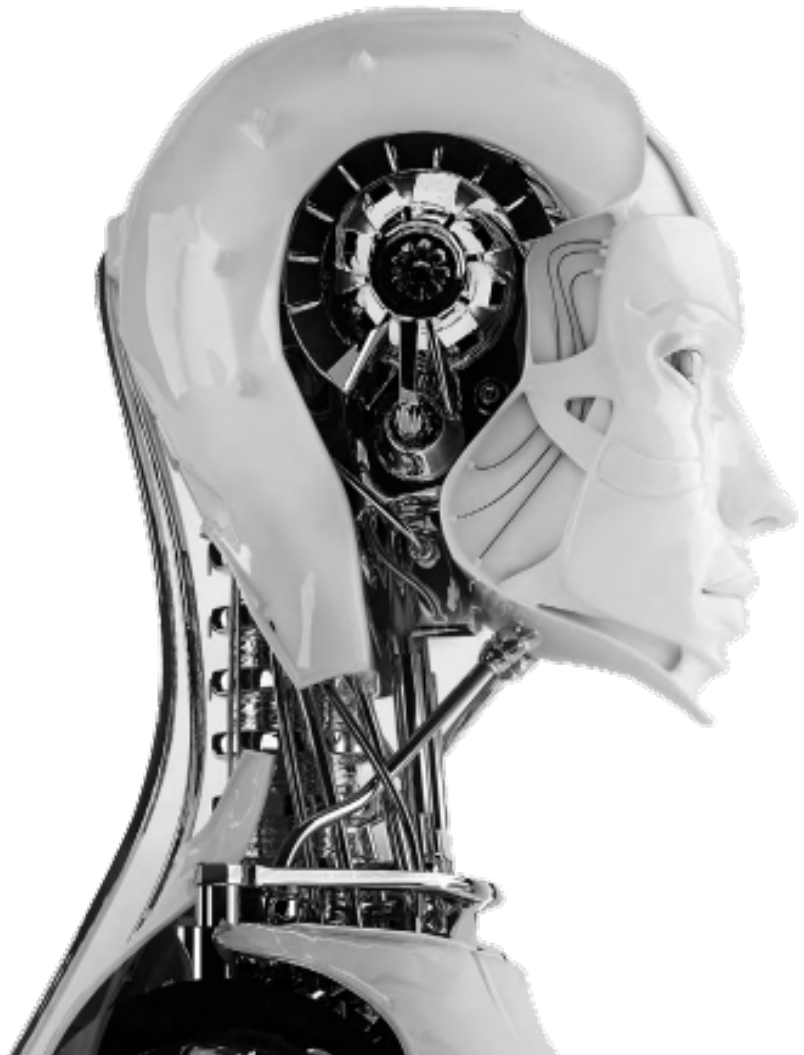
What is RPA?

An introduction

Robotic Process Automation (RPA) is a form of business process automation which allows anyone to configure software to emulate and integrate the actions of a human interacting with digital systems to execute business processes.

RPA scenarios can range from using a robot to generate automatic responses to specific emails to deploying thousands of bots to create and maintain records on an ERP system. Robots are particularly effective when they are tasked with communicating with other systems to perform a vast variety of repetitive tasks, as they have 24-hour availability and do not make mistakes.

Universities looking to improve student experience often choose RPA as the first step in the digital transformation of operations as it is a low cost and low risk option that can quickly produce tangible returns on investment.



Meeting Expectations

How RPA can serve today's student

Digital transformation initiatives within Higher Education are often centred around delivering a more positive student experience. For the typical student (a digital native) they expect their interactions with their University to be the same as any other entity they choose to do business with. They want interactions to be;

- **Prompt** (you should resolve my query quickly)
- **Accurate** (you have access to my details and should use them to identify me)
- **Flexible** (any channel, any time)

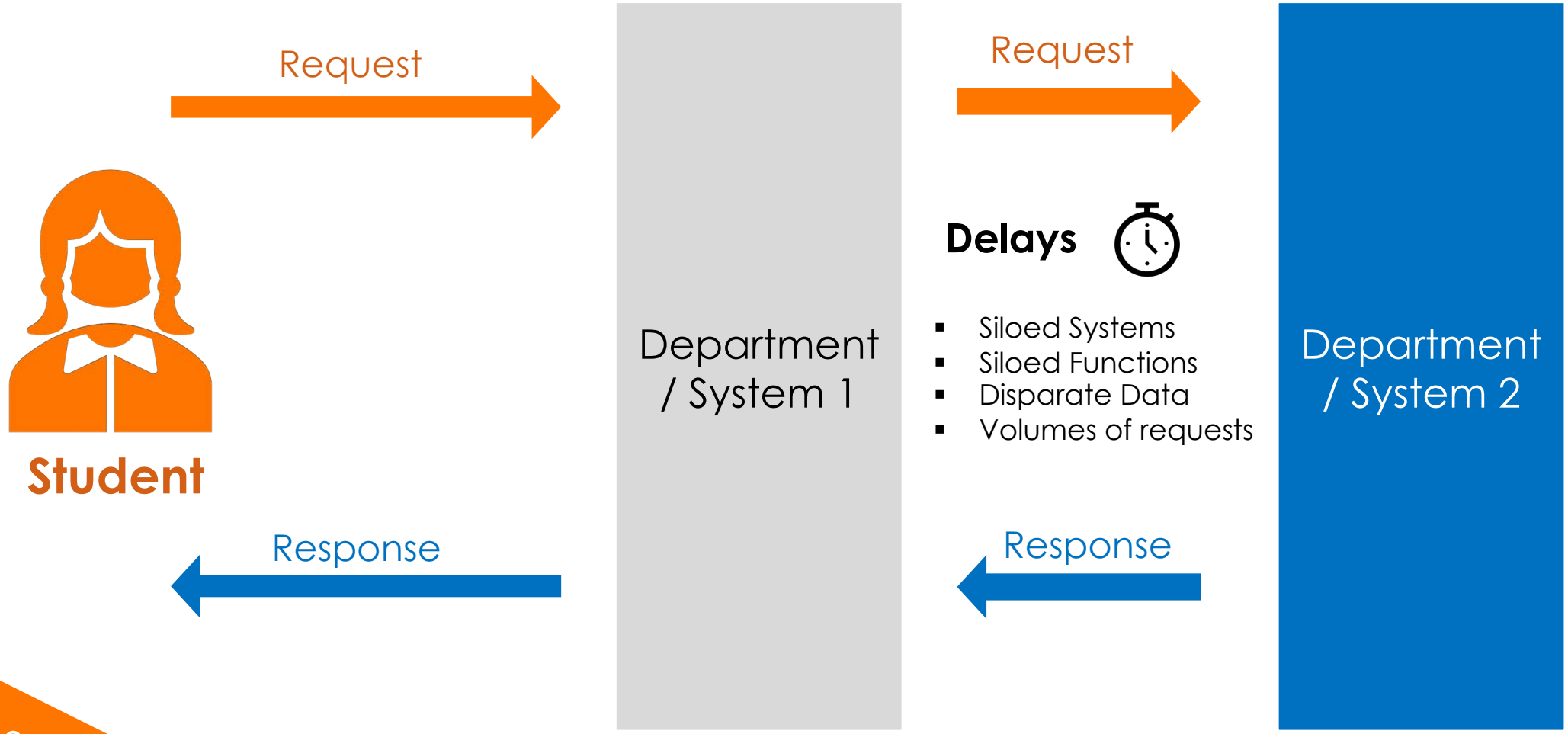
The ability to meet these expectations is often impacted by system or functional challenges within the University such as;

•**Siloed Systems** – Systems that don't talk to each other so rely on re-entry of data from one system to the next.
•**Siloed Functions –** A service may often by handled by multiple functions which increases the risk of delay and misalignment.
•**Disparate Data** – Data is often stored in separate systems and requires manual extraction to create requested documentation.
•**Volume of Requests** - At peak times (i.e. clearing) the volume of requests often outstrips the capacity to deliver, leading to backlogs.

Successful implementation of RPA minimises response time between request and delivery; eradicates errors; and scales in line with student growth; thereby recovering time for staff to focus on higher value activities.

Using RPA to Bridge the Gap

between expectation and delivery of requests



Overcoming Challenges

In Siloed Systems

Any entity that has gone through digital transformation knows the value that unifying systems can provide to the end customer. However, full integration, (i.e. getting systems to talk to each other), is not always possible because integration between systems:

- may be too complex to implement
- may be low on the transformation agenda
- may not be financially beneficial or viable
- will impact on day to day business operations too much.

The impact of siloed systems is the considerable administrative time spent transferring information from one system to the next. Not only is this a time consuming and repetitive task, but the risk of human error is high.

In instances such as these, an RPA robot can be used as a low-cost solution to 'integrate' systems by transferring data 'automatically' delivering the following benefits:

- dramatic reduction in time taken / turnaround time
- 100% accuracy
- 24-hour availability.

Example

Challenge: Updating changes to 'exceptional factors', 'complaints' and other similar requests into multiple disparate systems in a timely and accurate manner.

Process Automated: Extract data from originating database and enter onto various student databases.

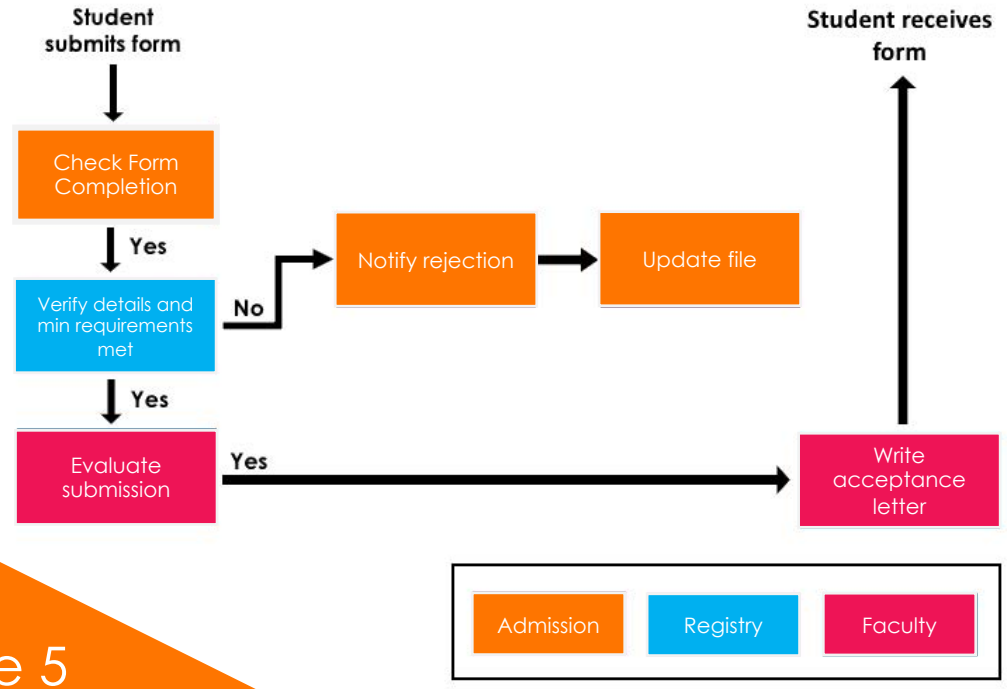
Benefits: Significant reduction in processing time, eradication of errors and improved student experience.

Overcoming Challenges

In Functions

Student onboarding and registration processes typically involve multiple internal departments, and as such, turnarounds may be the result of how quickly each function deliver 'its' part of the process. Employing RPA will reduce the time taken for the end to end process to be conducted and improves the experience for both staff and students.

Typical student enrollment process



RPA opportunities:

- RPA can be set up to auto-validate and verify the majority of requests and can pass more complex requirements for human verification. This reduces the volume of requests for staff to deal with, leading to higher quality outcomes.
- RPA can be set up to auto-notify students or admissions teams and update the student records without human intervention.
- RPA can take information from multiple sources and create a standard acceptance letter, ready for issue.

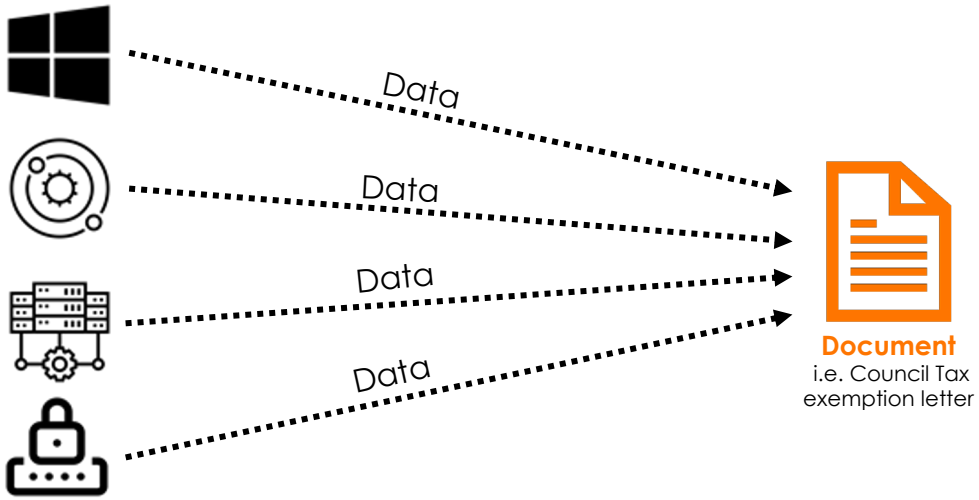
Overcoming Challenges

In Data

A typical by-product of entities with disparate systems are that the process of unifying data to draw insights or to send external information to stakeholders is an arduous task, typically involving administrators negotiating between multiple interfaces to extract snippets of data to build required documentation.

The use of RPA in automating the creation of documentation would;

- eradicate the risk of mis-keying the student data into external documentation
- dramatically reduce time taken/turnaround time for student requests.
- produce up to date reports at the touch of a button.



Example

Challenge: Administrators struggle with meeting the demand for Council Tax letter exemption requests that coincide with other peak time requests

Process Automated: Extract of data from multiple systems and populate into a template letter and issue to student.

Benefits: Significant reduction in processing time, eradication of errors, 24-hour availability all contributing to a better and faster student experience.

Overcoming Challenges

Of Meeting Expectations During Peak Times

Irrespective of industry, a large proportion of requests tend

- to follow simple rules (i.e. if request is lower than X, then execute Y)
- to be low value transactions where the requester values promptness in response above all else.

	Volume	What Student Values Most	Example
Simple	High	Prompt delivery of the response	Where is my letter?
Complex	Low	Prompt acknowledgement of request and effective case management	I have a serious complaint

At peak times, (i.e. during admissions and clearing), when the volume of requests is likely to exceed the function's capacity to deliver, lower volume but more complex requests tend to be impacted the most.

Provided a request follows a well-documented, rules-based process, RPA can deliver the request from emailing customers back with the relevant information to initiating payments. Reducing the volume of simple requests in the backlog, ensures that staff can focus on more complex requests. RPA bots can also improve the process of handling exceptions by consolidating information into a single case file ready for review.

Example

Challenge: Staff struggled to review mitigating circumstance requests in a timely manner which affected the student experience.

Process Automated: Check the student ID, if the student is requesting mitigating circumstances for the first time, grant request and record onto database. If the student has requested mitigating circumstances previously, capture information onto a case file and send for human review.

Benefits: Significant improvement to student experience and eradication of the request backlog.

RPA

A Key Business Partner to Support Functions

RPA has successfully been implemented across a variety of industries due to the commonality of the operational challenges that they face, particularly within support functions. Here are a few examples:

IT

Software Testing
RPA has been successfully deployed to test and mimic user interactions, specifically from a user perspective. User testing can be time consuming and mundane which exacerbates the risk of missing defects, which makes this ideal for RPA.

Onboarding
The process of onboarding, from generating account log in details for multiple applications to issuing registration paperwork to new staff can all be automated leaving staff to focus on higher value work.

Finance

Invoice Processing
Vendor invoice processing is a classic usage case for RPA. A typical process that is automated includes the transposition of information from the inbound invoice to the payroll portal such as SAP, internal reporting documentation and correct storage of the invoice to comply with SOX. The process can be further enhanced by leveraging Optical Character Recognition (OCR) and Automated Intelligence (AI) to deal with unstructured data from handwritten and nonstandard invoices, respectively.

Reporting
Typical finance functions spend a considerable time reporting information to both internal and external bodies. For the case of external reporting i.e. VAT, the need for accuracy is paramount. Producing reports of this nature

- is time consuming,
- is repetitive,
- requires the user to query the software in a specific way,

before analysis can be undertaken and reported. RPA can be used to generate the data in the required format for analysis by a human before release.

RPA

A Key Business Partner to Support Functions

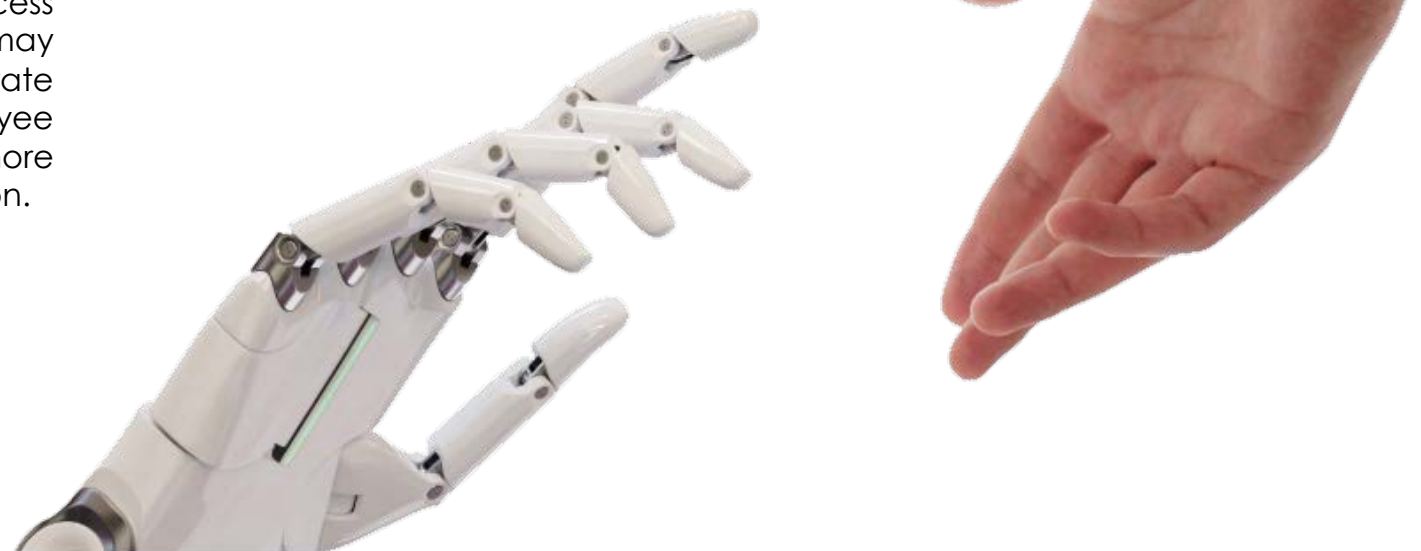
HR

Payroll

Modern payroll software tools usually provide an effective solution that minimises human effort. However, some companies may still be hampered by legacy systems and do not have the choice, capability or capacity to switch to new software. As such, leveraging RPA can bridge the 'integration' gap and can undertake the end to end payroll process.

Employee Data Management

HR holds a considerable volume of employee data that requires regular revision to align with a multitude of updates - from changes to status and benefits to compliance or regulatory changes. The process of updating records is a tedious and manually intensive one that may also need to be replicated if the function uses multiple disparate systems. Using RPA to manage the process for updating employee information ensures accuracy and frees staff time to conduct more value adding tasks, whilst minimising exposure of sensitive information.



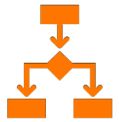
Which Processes?

Knowing *What* to Automate

The first process you choose is perhaps the most important one, as it demonstrates proof of concept. A successful pilot of the technology will win 'hearts and minds' and so it should be a process that is well documented and measured as part of a key performance indicator. This ensures that any benefits do not need to be inferred as the mechanism for measurement is well understood and easily identified.

Outside of the above, processes generally sit within a spectra of RPA applicability:

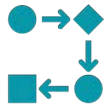
Processes that may be suitable for RPA straight away may:



Be Process Mapped

Be Functional
(i.e. working well – particularly if a process has undergone process improvement)

Be High Volume with Low Variation



Be Logic/Rules Based

How EQUANTiiS Can Help

Our Methodology

Equantiis breaks the traditional methods of consulting by partnering with clients to understand their business objectives, then bringing real life experience and expertise to delivering them through a completely independent and agnostic approach.

By taking a strategy first approach, Equantiis will only advocate the use of RPA if the process genuinely brings value to the organisation. Using a robust and rigorous framework to prioritise the initial processes to automate, clients can rest assured that the value of the technology is maximised. This, in turn, builds the foundation for the Company to develop an ongoing pipeline of opportunities for automation, leveraging complementary technologies such as OCR, Chatbots, and machine learning.

Equantiis has the capability to guide your Company through the entire journey from initial identification, proof of concept, implementation - through to benefits realisation.

Thank You

What next?

Thanks for reading Equantiis' Guide to RPA in Higher Education.

If you have any questions, or want to have a chat about how these opportunities could be applied to your organisation, contact me through any of these channels:

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