

Your Guide to

Intelligent Automation



Automation is a powerful tool that can be used to increase efficiency, maximize productivity, and improve accuracy.

Intelligent automation is a type of automation that utilises artificial intelligence, machine learning, and other advanced technologies to automate complex processes and tasks.

This guide will provide an overview of intelligent automation and explain how it can help organisations achieve greater success. We will also discuss the various types of intelligent automation solutions, their advantages, and how to get started with intelligent automation.

By the end of this guide, you will have a better understanding of intelligent automation and its potential to help your business transform customer experience and achieve operational efficiency.

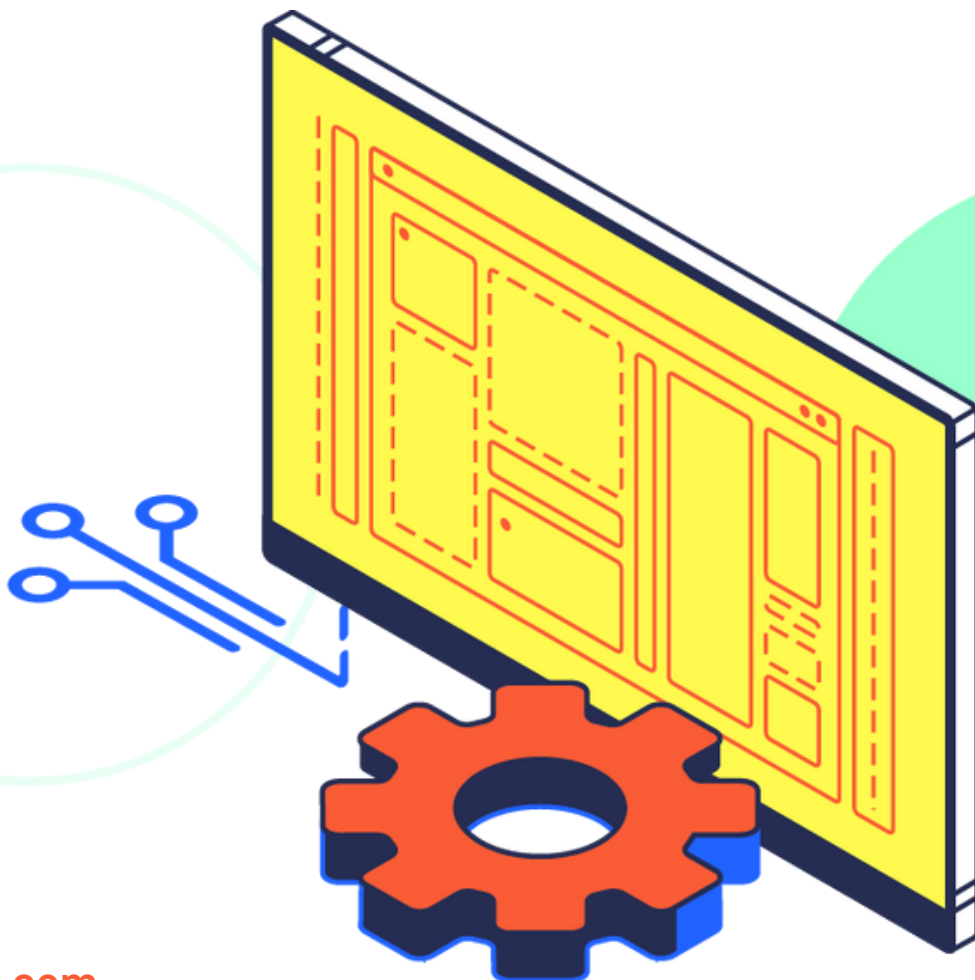
Introduction

What is intelligent automation?

Intelligent automation is the use of artificial intelligence (AI) and other advanced technologies for automating business processes. It is an umbrella term for a range of technologies, including robotic process automation (RPA), natural language processing (NLP), machine learning (ML), and predictive analytics. It is designed to help organisations reduce costs, increase efficiency, and improve customer experience.

What technologies make up intelligent automation?

Intelligent automation is typically a combination of artificial intelligence (AI), machine learning, robotic process automation (RPA), natural language processing (NLP), and other technologies. It aims to automate complex and time-consuming processes through automation, while leveraging the power of AI and machine learning to increase accuracy and efficiency.



Why do I need to consider Intelligent Automation as part of my digital strategy?

Intelligent automation is an essential part of any digital strategy. It can help organisations become more efficient, reduce costs, and improve customer experience.

Automation can also help organisations to quickly and easily implement new processes and systems, allowing them to stay ahead of the competition. Furthermore, automation can also help to better manage data, allowing organisations to make better decisions and gain insights into their operations.

The intelligent automation market was estimated to be worth over \$9.5 billion in 2020 and is expected to grow at a compound annual growth rate (CAGR) of 24.2% from 2020 to 2027. This market is being driven by the growing demand for automation solutions to reduce costs, increase efficiency, and improve customer experience.

It is estimated that over 70% of organisations will look to develop intelligent automation solutions in the next 3–5 years. This is due to the growing demand for automation solutions to reduce costs, increase efficiency, and improve customer experience.

Additionally, many organisations are recognising the potential of AI and other advanced technologies to help them stay competitive in the market.

Why do I need to consider Intelligent Automation as part of my digital strategy?

The top reasons organisations adopt Intelligent Automation are as follows:

1. Legacy systems unable to deliver workflow
2. Systems not integrated, resulting in manual and time-consuming work
3. You have capacity issues at certain times of the year
4. You can't keep up with the manual processes within the organisation

Intelligent Automation: The Technology

What is RPA?

Robotic Process Automation (RPA) is a technology that uses software robots to automate mundane, repetitive tasks. It is designed to help organisations increase efficiency and reduce costs by automating manual and time-consuming tasks. It can be used for a variety of tasks, such as data entry, customer service, document processing, and more.

RPA technology is quickly becoming a popular choice for businesses, as it is relatively easy to set up and use.

What is Artificial Intelligence?

Artificial intelligence (AI) is a branch of computer science that focuses on creating intelligent machines that can think and act like humans.

AI is used for a variety of tasks, including natural language processing (NLP), image recognition, and decision-making.

AI systems can learn from experience and adjust their behaviour based on new data.



What is Machine Learning?

Machine learning is a type of artificial intelligence (AI) that allows computers to learn and improve from experience without being explicitly programmed. It uses algorithms to identify patterns in data and make predictions and decisions. Machine learning is used in a wide range of applications, from image recognition and natural language processing (NLP) to predictive analytics and autonomous vehicles.

What is OCR technology?

OCR (Optical Character Recognition) technology is a form of AI that uses optical character recognition algorithms to convert scanned images of text into digital text that can be edited and searched. OCR technology is commonly used to extract data from documents, such as invoices, contracts, and forms. It is also used in many other applications, such as facial recognition, handwriting recognition, and automated text translation.

The top 10 tasks that should be Automated in ANY organisation include:

1. Data Entry
2. Email Management
3. Order Processing
4. Payroll
5. Accounts Payable
6. Accounts Receivable
7. Inventory Management
8. Expense Management
9. Starter/Leaver process
10. Data Analysis and visualisation



Your Business and Intelligent Automation: Your Questions Answered

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How do I implement Intelligent Automation?

Identify business processes that can benefit from automation.

- 1 Start by identifying the processes that you believe can be automated and which will improve efficiency, accuracy, and cost savings.

Choose the right technology stack. Once you have identified the processes to be automated, you will need to decide on the right technology stack. Consider the different types of automation, artificial intelligence, machine learning, robotic process automation (RPA), natural language processing (NLP) and predictive analytics.

- 2

Analyse the data. Use the data collected to make decisions about the best way to automate the process. Analyse the data to identify patterns and trends that can help you make decisions.

- 3

Develop and test the automation. Once you have identified the best way to automate the process, develop and test the automation before deploying it. Make sure to test the automation on a variety of data sets.

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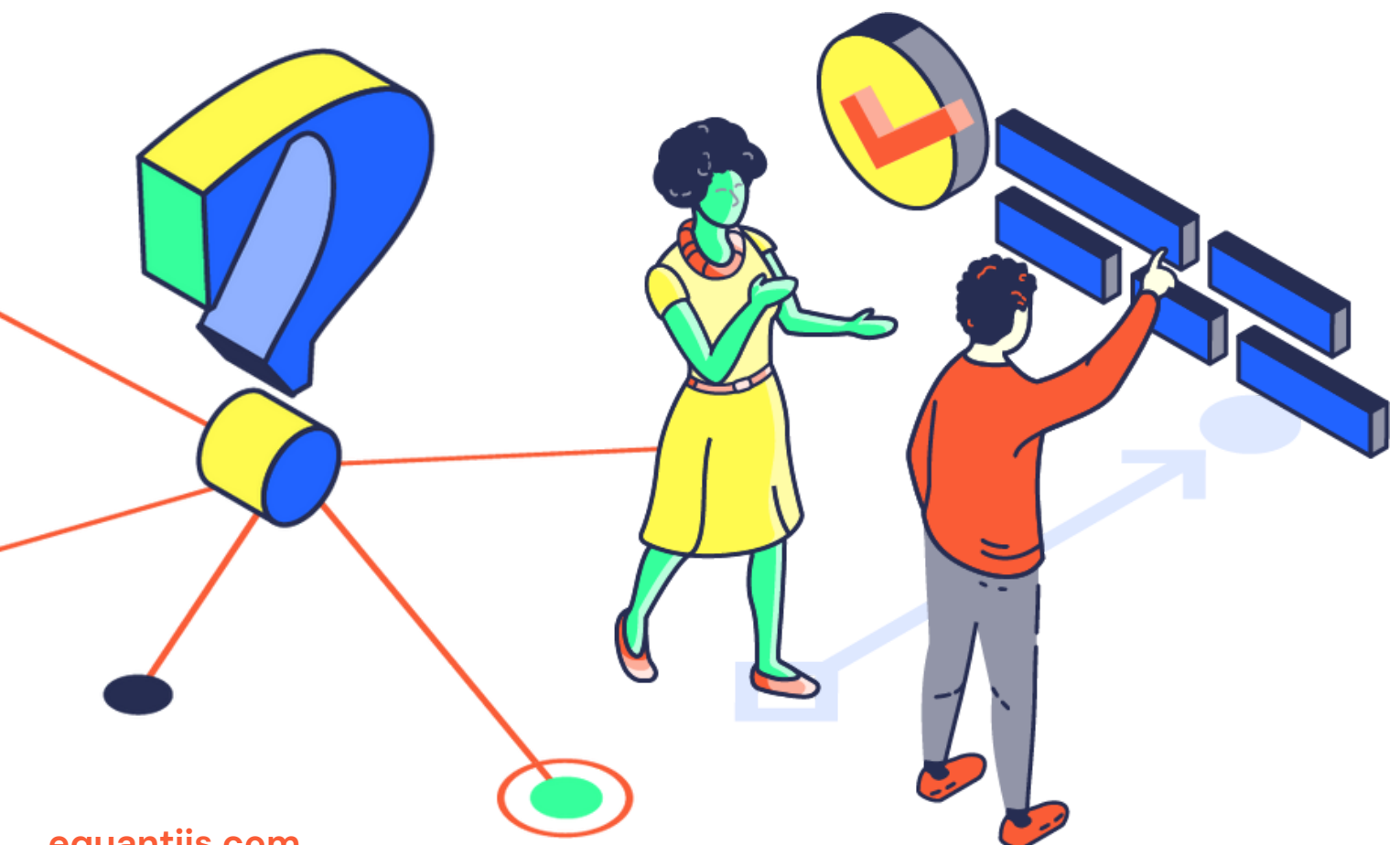
Monitor the automation. Monitor the automation on an ongoing basis to make sure it is running smoothly and efficiently. Make sure to update and tweak the automation as needed to ensure it is still meeting your business needs.

- 5



How do I identify the processes to automate?

- 1 Analyse current processes.** Start by looking at the current processes in place to identify which processes could be automated.
- 2 Identify manual tasks.** Look for any manual tasks that could be automated.
- 3 Estimate the cost/time savings.** Calculate the cost and time savings that could be achieved by automating the process.
- 4 Prioritise the processes.** Once you have identified the processes that could be automated, it is important to prioritise them. Consider which processes would provide the greatest benefit and which could be automated quickly and easily.
- 5 Develop a plan.** Once you have identified and prioritised the processes to automate, develop a plan for automating them. Consider the resources needed, the technology required, and the timeline for automation.



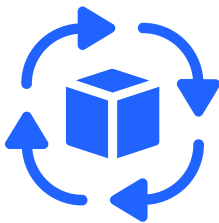
What business areas should I be looking at for intelligent automation?



Customer Service: Intelligent automation can help automate customer service tasks such as responding to customer inquiries, directing customers to the right resources, and resolving customer complaints quickly and accurately.



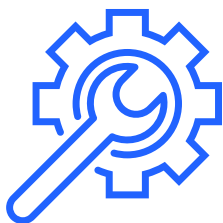
Accounting and Finance: Automating tasks such as accounts receivable, accounts payable, and payroll can help reduce the time needed to process transactions and ensure accuracy.



Supply Chain Management: Intelligent automation can help improve supply chain processes by tracking inventory, optimising delivery routes, and automating order fulfilment.



Human Resources: Automation can help streamline the recruitment process, automate onboarding, and simplify employee reviews.



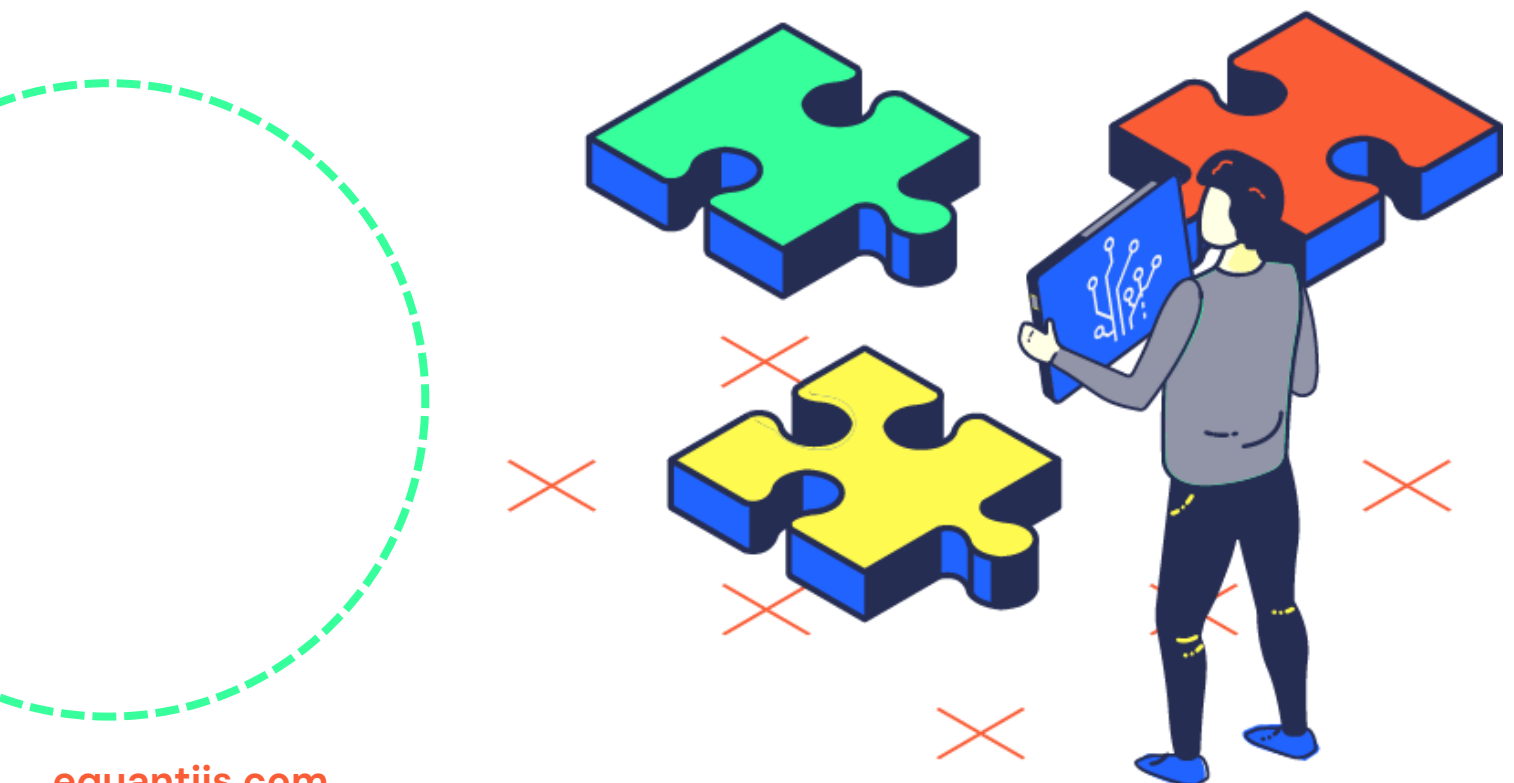
Manufacturing: Automation can help streamline manufacturing processes, improve product quality, and reduce production costs.



Healthcare: Intelligent automation can help streamline medical records management, automate patient scheduling, and improve the accuracy of medical diagnoses.

How do I build the business case for intelligent automation?

- 1** **Analyse Your Current Processes:** Start by analysing your current processes and identifying areas where automation could improve efficiency and reduce costs.
- 2** **Calculate the Return on Investment:** Once you have identified areas where automation could improve your processes, estimate the potential cost savings you could achieve with automation.
- 3** **Estimate the Impact of Automation:** Estimate the impact that automation could have on other areas of your business, such as improved customer service and increased employee productivity.
- 4** **Demonstrate the Value of Automation:** Present your findings to key decision makers in your organisation and demonstrate how intelligent automation can improve efficiency, reduce costs, and increase customer satisfaction.
- 5** **Consider the Long-term Benefits:** Consider the long-term benefits of automation, such as improved scalability, increased accuracy, and enhanced security.



Your Intelligent Automation Journey

What are the steps to start intelligent automation journey?

Identify the problem: The first step in creating an intelligent automation journey is to identify the problem that needs to be addressed. This could be a manual process that needs to be automated, a customer service request that needs to be handled quickly, etc.

Analyse the Process: Once the problem is identified, it is important to analyse the process that needs to be automated. This includes understanding the existing workflow, process steps, data sources, and other information related to the process.

Design the Solution: After analysing the process, the next step is to design a solution that will address the identified problem. This includes deciding which technologies to use and mapping out the process.

Implement the Solution: After the solution is designed, it is time to implement it. This includes coding and testing the system as well as integrating it into the existing infrastructure.

Monitor & Adjust: The final step is to monitor the solution and adjust it as needed. This could include making changes to the code or adding additional features to improve the system.

What are the steps to start intelligent automation journey?

The technology part of your IA journey is really easy. Adopting a successful change management culture that ensures you can demonstrate and continue to take advantage of this technology is where the hard work begins.

In order to adopt Intelligent Automation into your organisation a Centre of Excellence should be built as part of your project.

How do I build a Centre of Excellence for Intelligent Automation?

- 1** **Set up a team.** Create a team of experts to lead the development and implementation of your intelligent automation initiatives.
- 2** **Develop a strategy.** Develop a clear strategy for your intelligent automation initiatives. This should include goals, objectives, and a timeline.
- 3** **Identify the technologies.** Identify the technologies that will be needed to support the intelligent automation initiatives. Consider the different types of automation, artificial intelligence, machine learning, robotic process automation (RPA), natural language processing (NLP) and predictive analytics.
- 4** **Develop best practices.** Develop best practices for deploying and maintaining the intelligent automation initiatives.
- 5** **Monitor progress.** Monitor the progress of the intelligent automation initiatives and make adjustments as needed.
- 6** **Measure results.** Track and measure the results of the intelligent automation initiatives to ensure they are meeting the goals and objectives.

The importance of Governance in your Intelligent Automation project

Like every project, governance is key and should be defined at the beginning as part your success criteria.

Good intelligent automation governance should include a set of processes, roles and responsibilities, and related guidelines that enable successful implementation and management of intelligent automation.

Specifically, it should include a governance framework that defines the roles and responsibilities of all stakeholders, including executive sponsors, business owners, technical owners, and operations personnel. Additionally, it should include a governance structure with clear decision-making processes and organisational structures for tracking and managing automated processes.

The governance framework should also include a framework for managing the lifecycle of intelligent automation, including control measures to ensure compliance with data privacy and security regulations. Finally, it should include a method for measuring success and evaluating the effectiveness of intelligent automation.





Top Ten Questions to ask when starting your Intelligent Automation journey

Adopting ANY new technology will always raise questions doubt and fears from people. Managing concerns and fears will be critical to ensuring a successful Intelligent Automation project.

Be clear on the why for the project and how staff can be involved in this success. Here is a list of the top 10 concerns around automation. Take the time to understand these fears and risks so you can form a mitigation plan.

- 1** **Job Loss:** People fear that automation will lead to job losses, particularly in service-oriented industries.
- 2** **Privacy Concerns:** As automation becomes more pervasive, people fear their privacy will be violated by the increased use of data and analytics.
- 3** **Lack of Control:** Automation can take away some of the control people have over their lives, such as decision-making.
- 4** **Unintended Consequences:** Automation can lead to unforeseen or unintended consequences, such as when an automated system fails due to a bug or design oversight.
- 5** **Increased Risk of Cyberattacks:** Automation can make systems more vulnerable to cyberattacks.
- 6** **Loss of Human Interaction:** Automation can reduce the need for human interaction, which can lead to isolation and disconnection.
- 7** **Unethical Behaviour:** Automation can lead to unethical behaviours, such as decisions being made without considering the ethical implications.
- 8** **Inequality:** Automation can lead to further inequality if the technology is not distributed equally.
- 9** **Rapid Change:** Automation can lead to rapid changes in markets, which can be difficult to adapt to.
- 10** **Overreliance on Automation:** Automation can lead to a reliance on the technology, which can lead to dangerous decisions if the technology fails.

How can Equantiis help?

Equantiis uses an innovative Intelligent Automation solution designed to transform customer experience and drive operational efficiency.

Simple to develop and deploy without requiring complicated IT integration, our software 'bot' is programmed to interact with your core applications as if they were human, trained as part of your workforce to perform routine, repetitive tasks.

Contact Equantiis today and learn how Intelligent Automation could improve your business processes.





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