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Advance Process Automation By Keeping Automation Technologies In Their Own Lanes

RPA, DPA, Dynamic Case Management, Digital Decisioning, And AI Each Have A Distinct Role

by Rob Koplowitz
November 11, 2019

Why Read This Report

Process automation is vital for any digital transformation strategy. The problem: There are many ways to automate a business process. Robotic process automation (RPA) currently dominates the conversation. It is a critical element of an intelligent automation strategy but just one of many technologies that application development and delivery (AD&D) pros need to enable straight-through automation. In this report, we outline the technology components of an intelligent automation strategy and clarify how each complements the others to drive success.

Key Takeaways

Strong Technology Governance Must Back Any Automation Strategy
Successful digital transformation must have a strong process automation foundation. This requires governing multiple complementary technologies, each serving a discrete purpose.

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with Christopher Mines, Abigail Livingston, and Kara Hartig

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Straight-Through Processing Is An Important But Difficult Goal

Digital disruptors all share one key characteristic: Their customer interactions and operations are radically automated. The result? Lower costs, fewer errors, much faster execution, fewer mundane tasks for employees, and ultimately better customer experiences. That's tough to compete with for many traditional businesses. For example, automation of customer onboarding in a traditional business crosses multiple legacy systems and organizational boundaries that were never set up to work together. This is in stark contrast to a digital-first company that designs a seamless customer journey and deploys software as a differentiator in delivering customer outcomes.

Process automation is the heart of digital transformation, and with many of these initiatives failing, it has taken on great urgency. Intelligent automation technologies, including digital process automation (DPA), RPA, dynamic case management (DCM), rules and decisioning engines, and AI all promise to help drive a successful automation strategy, but each needs careful governance to properly complement the others.[1]

Complex Processes Require Multiple Automation Technologies

With hundreds, if not thousands, of processes in most enterprises that beg for automation, those supporting customer experiences and journeys rise to the top of priority lists.[2] Because automating customer journeys can easily cross multiple legacy systems and organizational boundaries, these processes (e.g., complex customer onboarding) are particularly difficult to automate.

Such end-to-end customer processes likely require multiple automation technologies defined, managed, and monitored through a common orchestration layer. Take, for example, a generic customer onboarding process, as BusinessOptix, a process documentation and mining tool, details; it uses complementary intelligent automation technologies to automate the process (see Figure 1).

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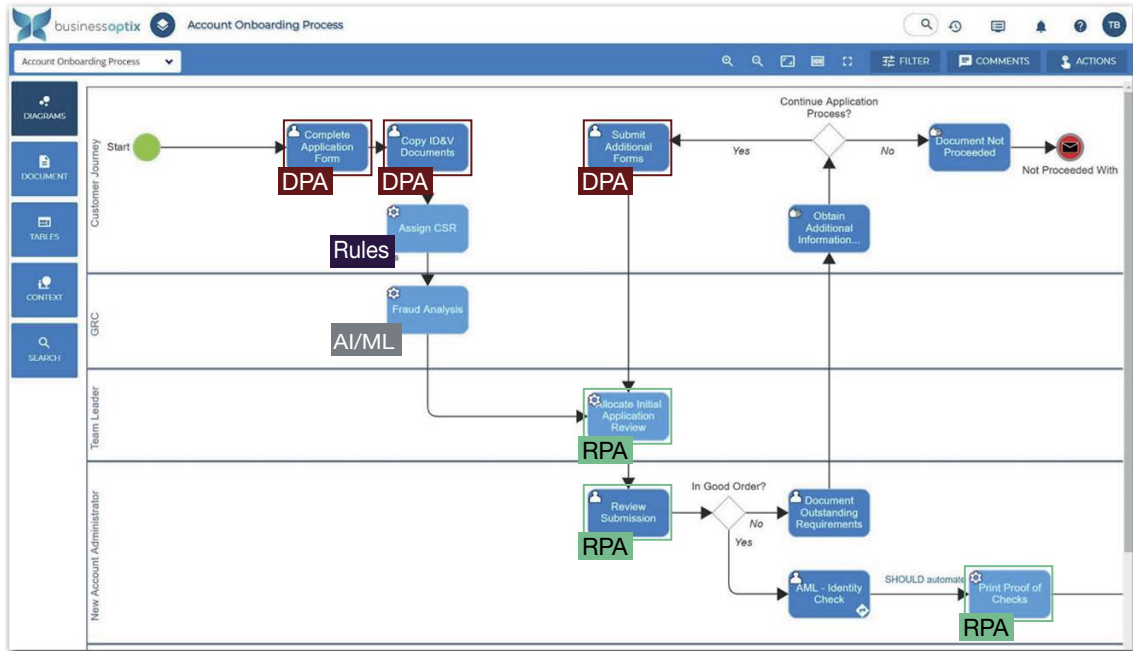Role

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This example demonstrates that a complex process presents numerous technology challenges and often requires disparate technologies to work together in a consistent way. The technologies complement one another to drive an automated outcome. When governance fails to keep the technologies focused on what they do best, problems result — potentially big problems:

› **Overreliance on one technology means a brittle solution.** Take the example of a large financial services organization that attempted to automate a complex end-to-end process by exclusively using a rules and decisioning engine. It took this path in spite of advice to use a DPA solution to model, orchestrate, and manage business flows with rules and decisioning to support complex conditional routing within the overall flow. The result? The complex process environment was difficult to configure and maintain and offered minimal reporting and transparency.

› **Conflicting technologies mean a suboptimal solution.** RPA is very powerful and useful technology for automating and supporting human-centric tasks. It is powerful when used properly and ineffective and potentially highly problematic when used improperly. So when a large healthcare company set up an RPA center of excellence (CoE) in parallel to the existing DPA CoE, issues immediately cropped up. The problem? When the business required process automation, the CoE that got the call did the work. But each technology did not necessarily account for the strengths and weaknesses of the others or, more importantly, for the potential that they were far more effective when used together. This type of approach results in potentially cumbersome, error-prone processes in RPA and potentially costly integration or manual workarounds in DPA.

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FIGURE 1 DPA, RPA, And Rules Management Combine To Automate Customer Onboarding

Source: BusinessOptix website

Each Technology Has Unique Capabilities And Needs To Stay In Its Own Lane

The categories of intelligent automation technologies each play a crucial role in driving end-to-end process automation. Each technology has specific use cases where it is most effective and least risky (see Figure 2).

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FIGURE 2 Uses For Automation Technology

Automation technology	Use cases
DPA-deep	Designed to handle sophisticated long-running processes, including designing, orchestrating, and monitoring processes that utilize most or all of the other intelligent automation technologies
DPA-wide	Designed to drive wide-scale process automation of low to medium complexity and may have capabilities to utilize multiple intelligent automation technologies
DCM	Designed to manage complex ad hoc and human-centric processes, which are often based on documents and require collaboration, coordination, service-level tracking, and content management, including archiving and retention
RPA	Designed to automate human tasks and potentially orchestrated to handle more comprehensive processes, with tasks and integration generally driven from the client, which provides simple integration by coordinating actions between multiple systems
Rules/decisioning	Designed to handle complex conditional logic and potentially used to drive process routing and resolution, generally offering easy maintenance of rules by business users without the need to reprogram process logic
AI	Designed to power a wide range of process capabilities including better understanding of unstructured content through natural language processing and tone analysis for routing and classification, natural language input through chat and voice, process optimization through machine learning (ML), and ML assistance for critical workloads like fraud detection and knowing your customer; often provisioned through cloud platform vendor offerings like those from Amazon, Google, IBM, and Microsoft

Recommendations

Use Complementary Technology To Govern Your Automation Initiative

An intelligent automation initiative requires AD&D diligence in the form of evaluation, governance, and technology selection. To properly govern your intelligent automation environment:

› **Define your automation technology requirements.** The landscape of automation technologies is broad. Each represents a significant effort in terms of cost, skills training, deployment, integration with complementary technologies, and governance. Everyone is doing RPA or low code? That doesn't mean they suit your needs for intelligent automation. Assess each of your automation requirements based on the functional capabilities of the solutions and determine your need for each.

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› **Evaluate all of your intelligent automation technology requirements.** Identify where and how you use all intelligent automation technologies in your portfolio. Make sure that the use of each aligns with the guidelines in this document. Apply this thinking centrally with input from all relevant stakeholders, even if technology implementation is done in a distributed manner in your organization.

› **Consider a preintegrated solution versus a best-of-breed one.** These automation technologies complement one another, but that does not remove the need for integration. Consider a prepackaged solution that brings multiple intelligent automation technologies together in a seamless way. For example, some DPA solutions offer application development, process management, case management, rules, decisioning, and RPA — all preintegrated and designed to be managed and monitored through a single orchestration layer.

› **Make intelligent automation analysis part of a broader automation governance model.** The organizational and strategic implications of intelligent automation make this far more than a technology issue. Your technology governance program should be part of a larger program that includes executive sponsorship, organizational change management, customer experience, process excellence, governance, risk, and compliance. In upcoming research, Forrester will examine governance beyond technology to include organizational structure, roles and responsibilities, change management, user experience and governance, risk, and compliance.

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Endnotes

[1] Forrester looks at the broad landscape for DPA-deep solutions in the following report. See the Forrester report "Now Tech: Digital Process Automation For Deep Workloads, Q3 2019." In that report, we segment vendors in three key categories: DPA, case management, and low-code development. These vendors also focus on RPA integration as well as rules and decisioning. Forrester looks more deeply into digital decisioning platforms in an August 2018 report. See the Forrester report "Now Tech: Digital Decisioning Platforms, Q3 2018." And Forrester evaluates RPA vendors in a June 2018 report. See the Forrester report "The Forrester Wave™: Robotic Process Automation, Q2 2018."

[2] In Forrester's Q1 2018 Digital Process Automation Survey, 57% of respondents indicated that they would increase the use of customer journey mapping as a process methodology, with another 26% responding that they planned to increase the use significantly. Source: Forrester's Q1 2018 Digital Process Automation Survey.

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