



Delivering ROI with Robotic Process Automation (RPA) and Splunk

Saving thousands of hours per month at Paychex
with RPA and Splunk

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About **PAYCHEX**

Payroll – HR – Retirement – Insurance

- ▶ Paychex is a leading provider of integrated human capital management solutions for payroll, human resources, retirement, and insurance services. By combining its innovative software-as-a-service technology and mobility platform with dedicated, personal service, Paychex empowers small- and medium-sized business owners to focus on the growth and management of their business.
- ▶ Backed by more than 45 years of industry expertise, Paychex serves over 670,000 payroll clients as of May 31, 2019, across more than 100 locations in the U.S. and Europe, and pays one out of every 12 American private sector employees.



2018 winner

PAYCHEX[®] at a Glance

Payroll

- ▶ #1 small business market
- ▶ #2 mid-market
- ▶ ~12M people paid
- ▶ Pay 1 in 12 American private sector workers

HR

- ▶ 1.5M worksite employees
- ▶ 52K clients
- ▶ Inc.com Best HR Outsourcing for SMBs

Retirement

- ▶ #1 recordkeeper in the U.S. by number of plans*
- ▶ 87K clients served
- ▶ 1M participants

* Listing by *PLANSPONSOR* magazine

Insurance

- 20th largest insurance agency in the U.S.**
- \$2.4B+ in premiums paid
- 125K clients

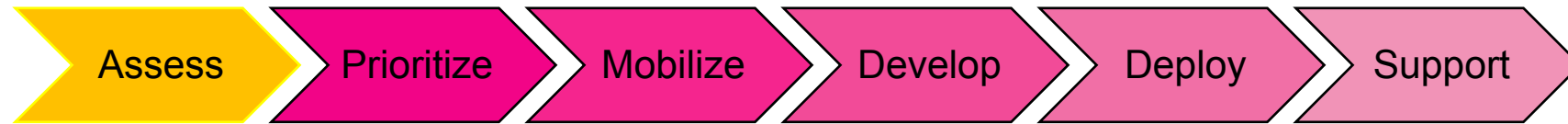
** Listing by *Business Insurance* magazine

Fast-Forward to the End



- ▶ Paychex was able to implement RPA technology that delivers over 75,000 hours in annual productivity savings within four months!
- ▶ This was accomplished by automating three key workflows!
- ▶ The ROI was calculated and delivered via a Splunk dashboard, along with important developer insight into bot and workflow health
- ▶ Our goal is to allow you to leave here with an outline of how you can pursue a successful RPA strategy supported by dynamic data presented through splunk dashboards with the click of a button

Rewinding to the Problem



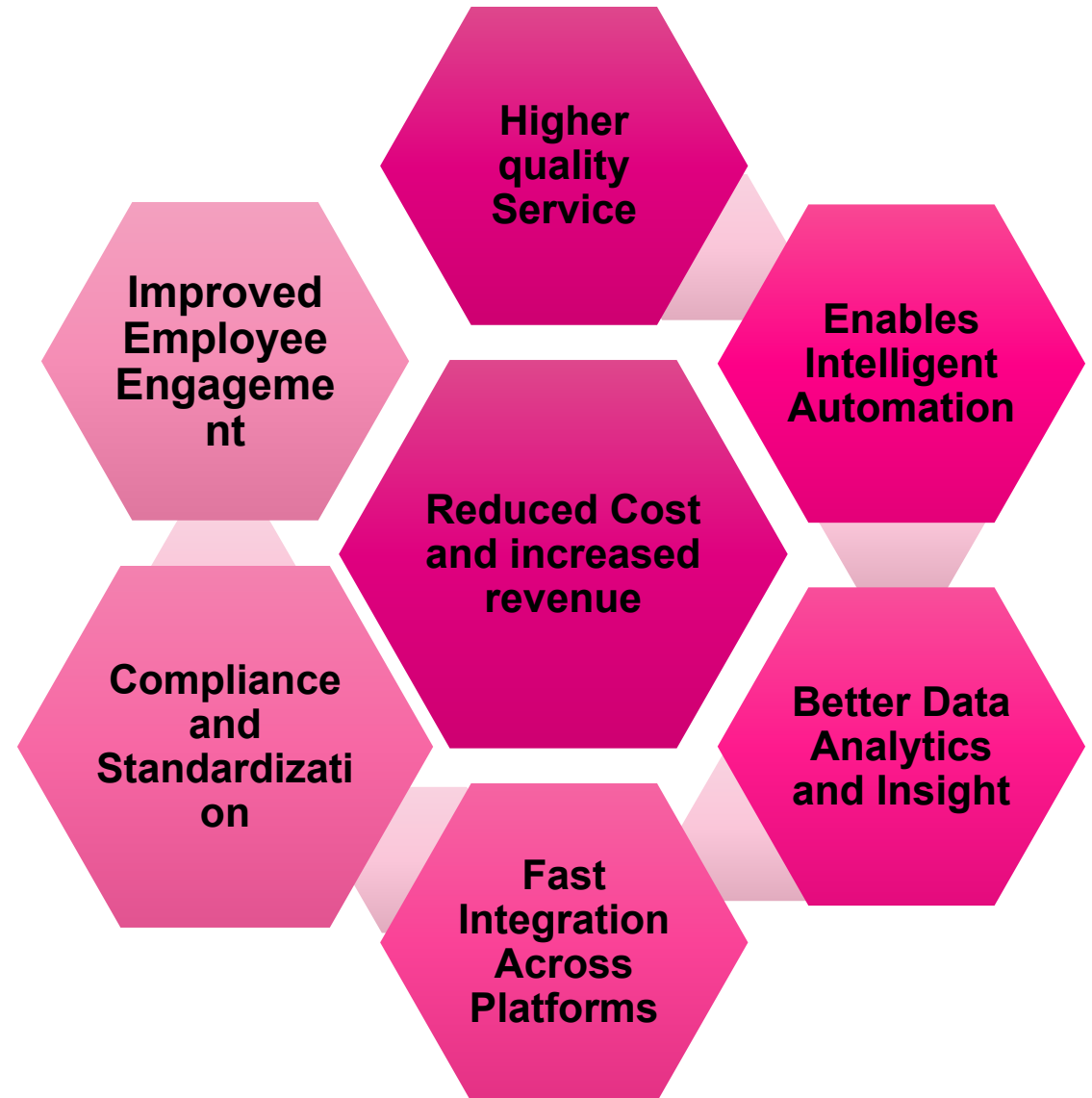
▶ General RPA problem statements

- Business team and Executive (C-Suite) management wanted to explore the ROI of RPA
- Digital transformation, Artificial Intelligence (AI), Machine Learning (ML) –buzzwords that lead to varying expectations in the industry
- Pressure to increase productivity, reduce cost, grow clients (but not grow service)

What is RPA?

RPA is **software written to streamline enterprise operations and reduce cost by autonomously accomplishing specific, high-volume, repetitive tasks within an environment with a focus on a full business process rather than a particular function or task.**

- Able to interact with applications via objects and/or character recognition
- Able to implement across applications and platforms without the need to learn the code behind each
 - No need for deep application knowledge
- Best for structured data and rules-based activities, where little subjective judgement is needed
 - RPA roadmap evolving to utilize Machine Learning (ML) and Artificial Intelligence (AI)
- Allows application development to focus on new features and technology and avoid BAU on aging applications
- A way to implement quick fixes while strategic improvements are planned and executed





“Taking the robot out of the human”

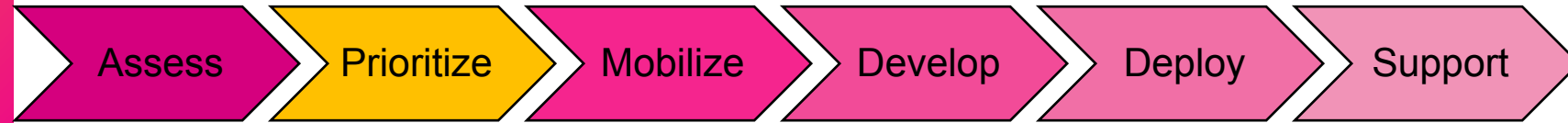
Leslie Willcocks, Professor at London School of Economics

RPA Workflow Examples

Where do you start looking for opportunities?

1. Moving data across applications
2. Accounts Receivable / Payable
3. Sales lead to quote
4. Making/moving appointments
5. Upsell recommendations (Netflix “you might like this movie”)
6. Email campaigns

Build Your Pipeline



1. Pick the right opportunities!
 - Tactical “quick wins” and “low hanging fruit”
 - Strategic for larger workflows and processes
2. Don't let people tell you only what interrupts their regular work, go after what their regular work is!
3. Use BPM/BPI software to identify processes along with BPIMs and BAs who know the work
4. Do not focus solely on FTE

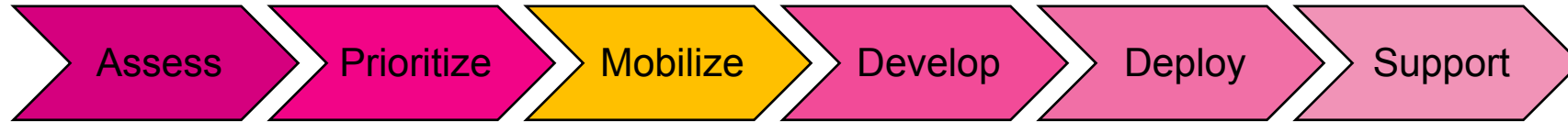
Productivity Savings

- Standardized Processes
- High Volume, low change work
- Larger groups = Larger ROI
- Moving Data
- Data Entry
- Data across multiple applications

Value-Add

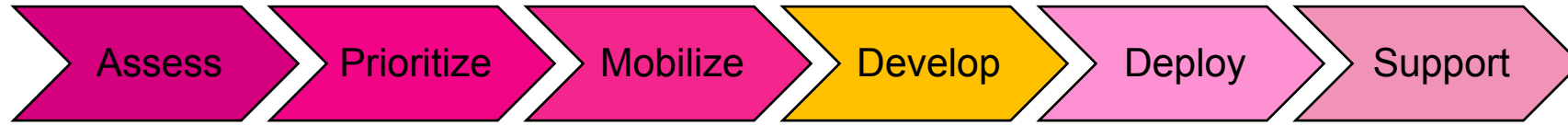
- Increase sales
- Generate sales leads
- Decrease losses
- Quicker time to market for new features
- Cleaner data

ROI Expectations – Get Commitment



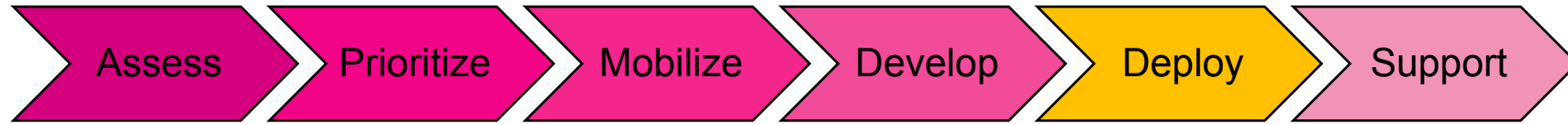
- ▶ Align on what defines a “transaction”
- ▶ Align on how ROI is being measured
 - Productivity ROI = Transaction volume * time per transaction
- ▶ Get Business Unit to sign off on how ROI will be used
 - Reduce open head count?
 - Increase Sales Quota?
 - Decreased SLA?
- ▶ Negotiate how ROI will be spent
 - If saving 5 people’s worth of time, perhaps 2 are realized through natural attrition and the other 3 are being used for more detailed work to reduce SLA
 - Define and communicate what “more detailed work” is!
- ▶ Define “happy path” expectations

Deliver, Deliver, Deliver!



- ▶ UiPath, AutomationAnywhere, Blue Prism
- ▶ **Keep Security engaged for bot accounts and application access!**
 - You have a digital workforce; traditionally defined “generic accounts” often do not work well
 - Treat them as the employees whose work they are doing, minus the breaks and vacation
- ▶ Keep an end-customer focus
- ▶ Ensure your logging captures your aligned definition of a “transaction” in order to display ROI

The Dashboards – Part 1.1 - ROI



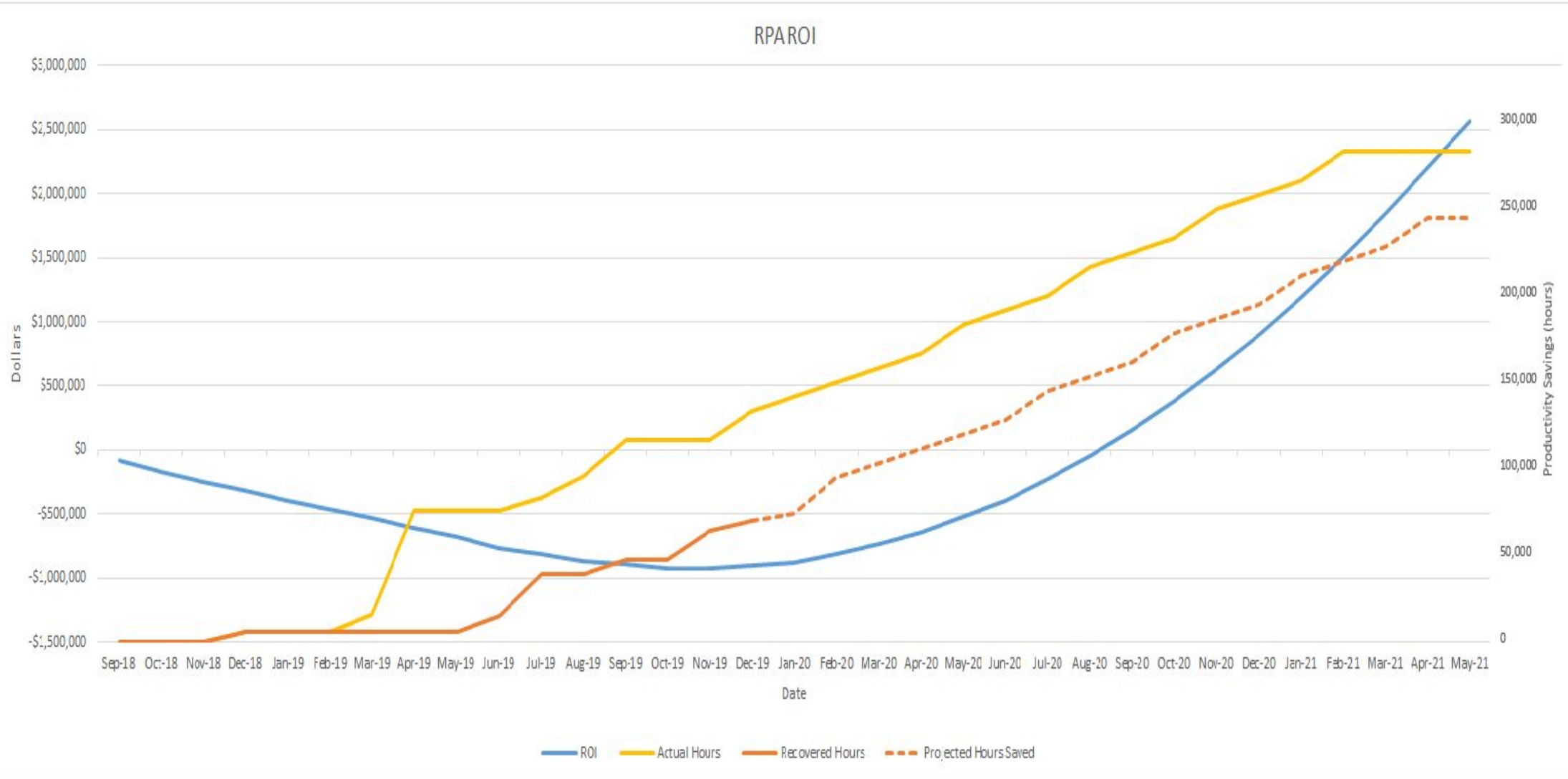
RPA Workflow Summary

Workflow Name	Total Transactions	Pass Count (% of total)	Business Exception (% of total)	Application Exception (% of total)	Total value (hrs)
Workflow 1	235,961	209,875 (88.9%)	12,664 (5.4%)	103 (0.0%)	7,066.2
Workflow 2	107,524	105,252 (97.9%)	1,551 (1.4%)	88 (0.1%)	5,456.2

RPA Summary

campaign	Pass Count (% of total)	Exception Rate (% of total)	Total Value (hrs)
Workflow 3	1,252,489 (99.1%)	11,105 (0.9%)	16,478.2
Workflow 4	49,706 (64.9%)	26,920 (35.1%)	378.3

ROI Extrapolation

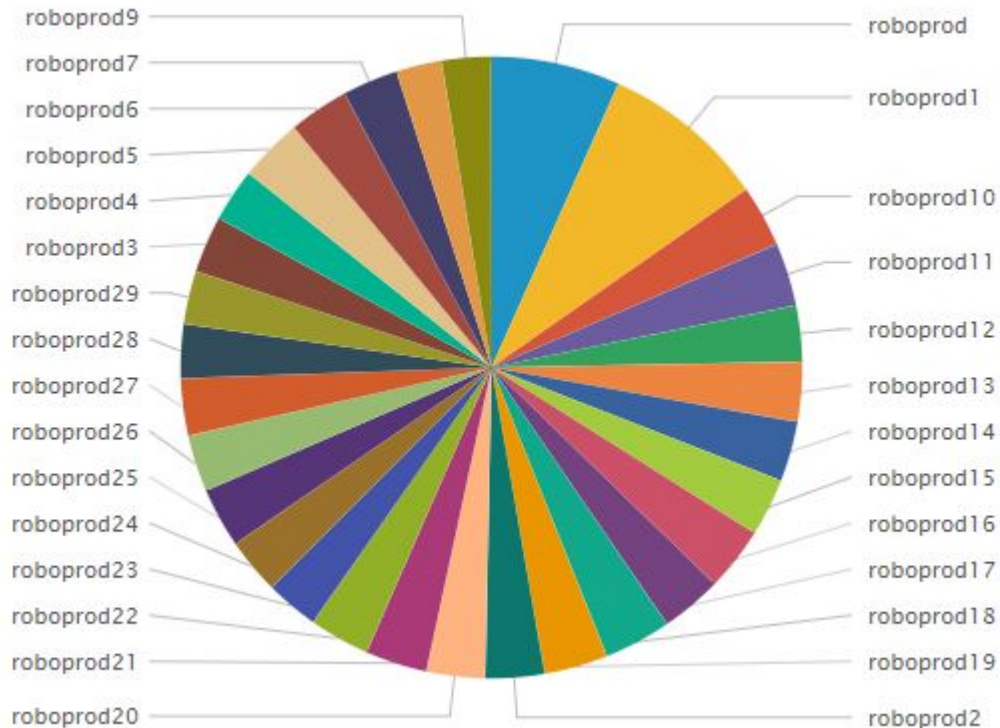
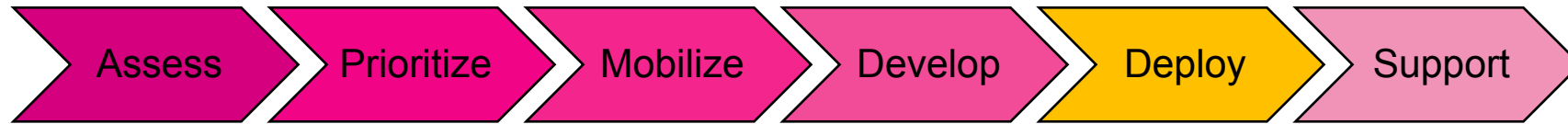


4 months:
75k hours

8 months:
96k hours

11 months:
117k hours

The Dashboards – Part 1.2 – Bot Balance



- Watch your bot load balancing to ensure bots are picking up appropriate work
- This is a backup to other bot error alerting
- **Bots are digital workers! You have a vested interest to ensure they are all working!**

The Dashboards – Part 2.1 - Exceptions



Top Limiter

Business Exceptions

processingExceptionReason	count	percent
Business Exception 1	23	37.7
Business Exception 2	14	22.9
Business Exception 3	8	13.1
Business Exception 4	8	13.1
Business Exception 5	5	8.1
Business Exception 6	2	3.2
Business Exception 7	1	1.6

Top Limiter

Application Exceptions

processingExceptionReason	count	percent
Cannot find the UI element corresponding to this selector:	1	100.0
	1	100.0

The Dashboards – Part 2.2 - Retries



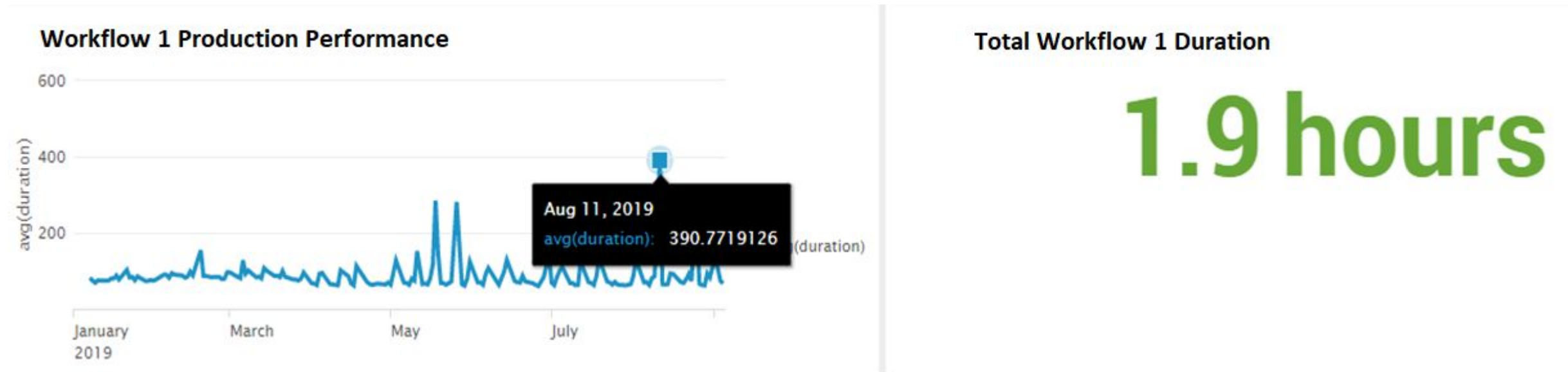
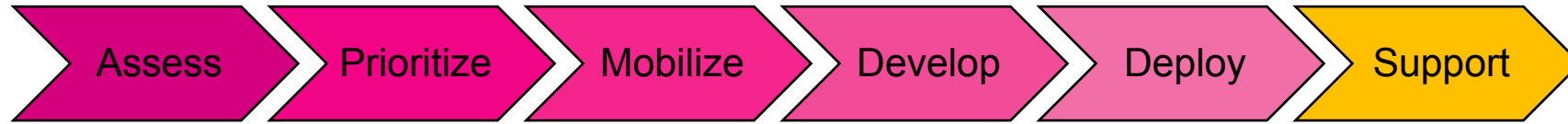
Top Limiter

Application Exception Retries

processingExceptionReason	count	percent
Cannot find the UI element corresponding to this selector:	19	95.0
Retry Exception #2	1	5.0
	20	100.0

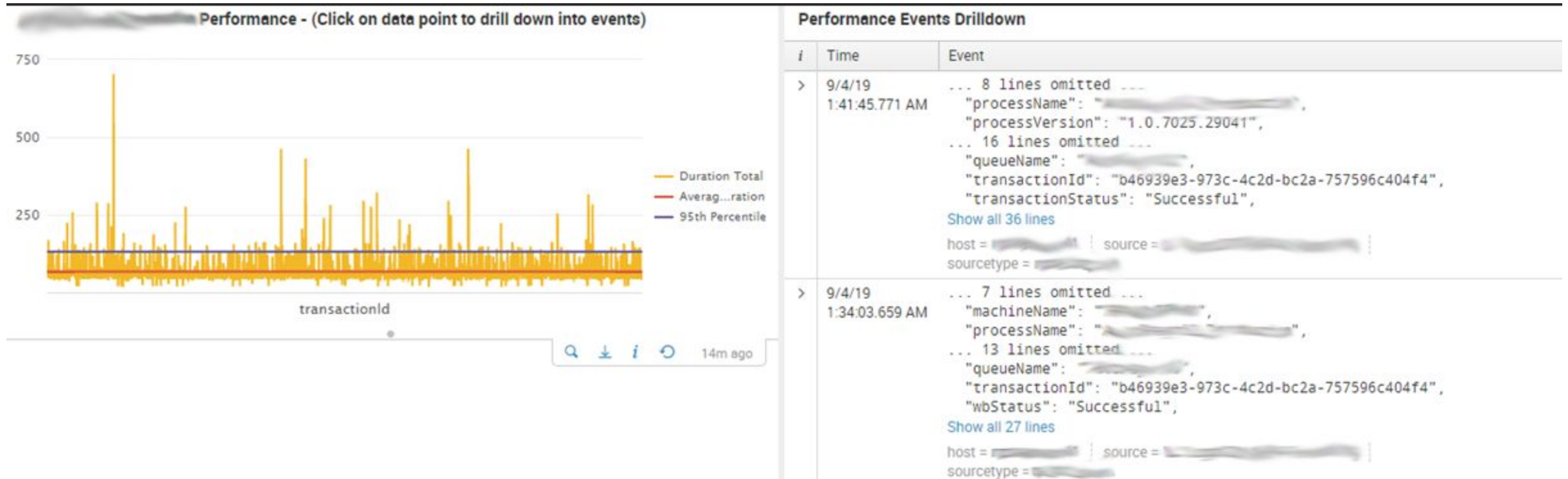
- Having retry logic increases success rate
- Retries take bot time, reducing overall workflow performance

The Dashboards – Part 2.3 - Performance



- Performance of bots is no different than performance of an employee. The faster they can get through a workflow, the more work they can do within a window of time
- Monitoring overall workflow performance also enables you to have a detailed view and plan for bot capacity.

The Dashboards – Part 2.4 – Drill Down



- Look at individual transaction run events for performance problems
- Watch your **95th/99th percentile** along with your average!
- Not all problems are worth fixing! Always have ROI in your mind!

Key Takeaways

Lessons learned from the journey and the end result

1. Promote/Market your RPA efforts to get ahead of the rumor mill
2. Align RPA pipeline with Product roadmap
3. Ensure you are speaking the same language with the business
4. Bot capacity – maximize work!
5. Use data to prove success
6. Change management is vital to success
7. Within 4 months Paychex RPA team was able to deliver over 75k hours in productivity savings

Q&A

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**Thank
You!**