

The bots are coming to do your admin and help manage your resources

Our guide for how Robotic Process Automation (RPA) can radically improve productivity, velocity and resilience across your business.



Technology is at its most transformative when it makes our lives less, not more, complicated. Yet so much of our lives, especially our working lives, are spent wrestling with mundane, repetitive tasks.

As a business this is inefficient, unproductive and demoralizing for employees at every level.

But what if you could outsource the daily drudge of manual, repetitive tasks to bots, or more precisely, Robotic Process Automation (RPA). A friendly bot, like me, who gets on with the tasks you deplore, and frees you up to engage in more productive, creative and fulfilling tasks.

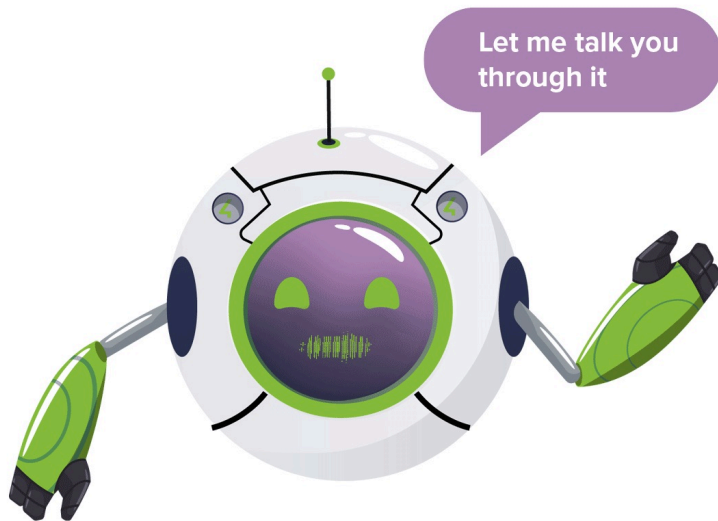
And it's more than that. When I'm used properly, I create a more personalized experience, across multiple applications and data sources. Giving you access to the data you need, when you need it, whether it's across the project life cycle, financial planning, HR or procurement.

When integrated effectively into your ERP, FP&A and HCM solutions, RPA – hi, that's me again – can work tirelessly, day and night, to drive productivity, velocity and resilience within your organization. (Even if I do say so myself).



Future proof your cloud solutions with Smart Automation

When Smart Automation across business cloud applications is done well, it offers businesses a better way to work.



The latest generations of ERP for example, creates an enterprise mesh that seamlessly integrates with any other solution your business is using, such as your CRM, CPQs, Financial Planning and HCM / Talent Management solutions or even collaboration tools such as Teams and Slack.

This next level business management system is ERP with a handy bot like me living inside, working just for you.

Suddenly the headache of manual tasks from overdue billing to missing timesheets, evaporates. A simple thank you will do.

Instead, you have just one platform where you can access and assess actionable, inter-connected information and insights, instantly, across people, projects and financials.

So, you'll be able to see how, say, a project's job satisfaction levels are impacting the budget. Giving you better insights and forecasting capabilities, while also providing solutions to improving performance.

Not bad for a bot, eh!

This machine learning-driven configuration (I just call it brain power) ensures the needs and requirements of each user across multiple departments can be met – offering a service with better performance, security, scalability and availability.

So, the future of ERP will simply make work better. Improving user experience, employee productivity and job satisfaction across your business.

And setting a new standard, by which all other systems will be judged.

Bots in action



One thing my dad told me is a robot's work is never over

So, it's no surprise that people centric cloud solutions, boosted by bots like me, will radically improve efficiency and productivity right across an organization's functions – from the project life cycle / field management, HR, financial management, operational budgeting, sales, procurement, reporting, planning and forecasting, systems admin, all the way to time and expenses. I'm tired just saying it.

In this guide I'll show you what a bot can do across your business through a few use cases I have been part of:

1. Operational Budgeting

3. Resource Planning

2. Financial Management.

4. Talent Management



Operational Budgeting



Getting the budget back on track

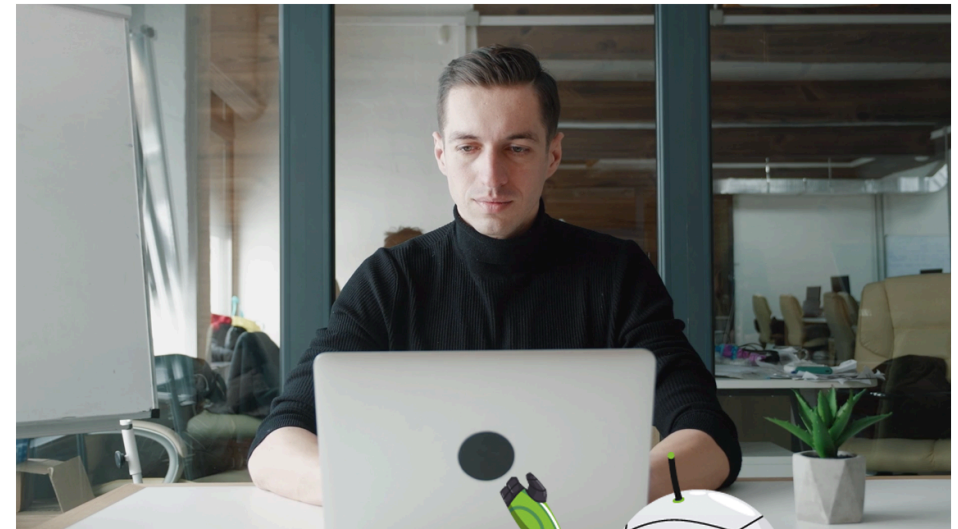
A program manager has inherited a new portfolio of projects. He doesn't know any of these projects so he needs to get his head into them. Work out how each of them are performing. If there are any red flags. And what he can do to get them back on track. No mean feat.

Thank goodness for RPA.

The first thing the program manager does is ask the friendly bot what projects are over budget.

First up, the bot shows a low margin on the New York Library project. He digs deeper into this project. The bot now gives him the details. The project is only 70% completed, yet 201% of the budget is spent.

Alarm bells are ringing.



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The program manager needs to find out more about what's going on. So he asks the bot to project what the margin will be if the project progresses as it is.

The bot duly obliges. Bearing bad news.

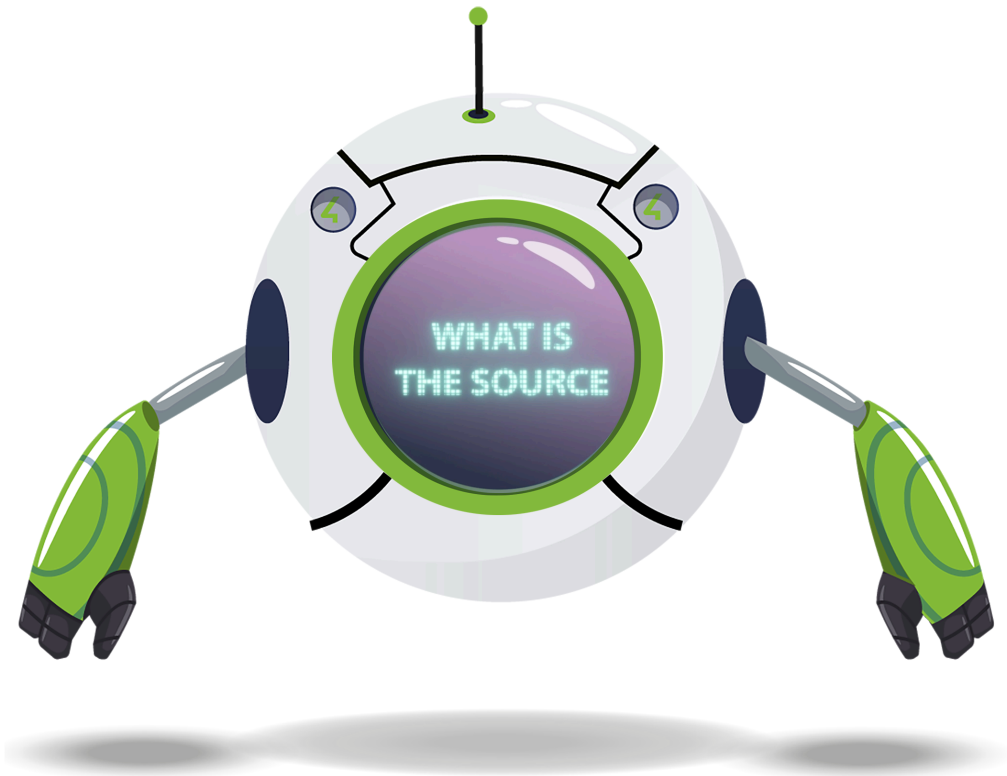
Using machine learning capabilities, the bot forecasts that if the project continues on its current trajectory, losses will reach £500,000.

Aghast, the program manager needs to rectify this situation quickly. But to do so, he needs to know what's causing the problem in the first place.

So he asks the bot to identify the reason for the project being so far off track.

Again, the helpful bot, relying on AI, tells it like it is.

At the middle of the project, almost everyone working is a sub-contractor. Why was this?



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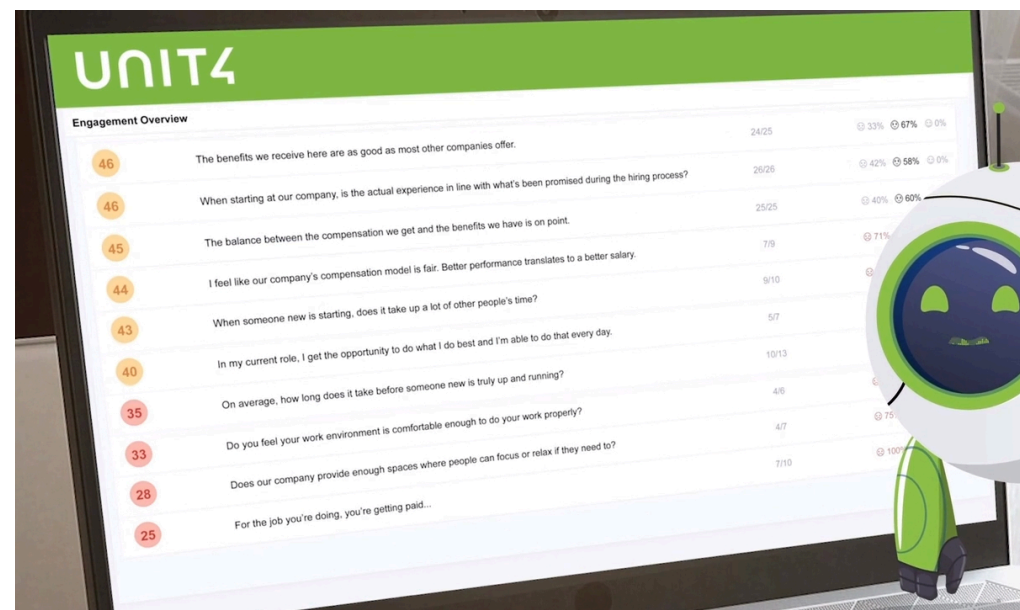
4. Talent Management

The bot pulls up data on engagement and people performance on the project from within the HCM solution. The bot finds that job satisfaction rates of internal staff is extremely low.

The bot's analysis finds three reasons for low employee satisfaction:

- **People don't feel challenged**
- **People don't feel safe in their role**
- **People lack focus**

Based on this information, the bot sets up a meeting with the HR Director in Outlook.



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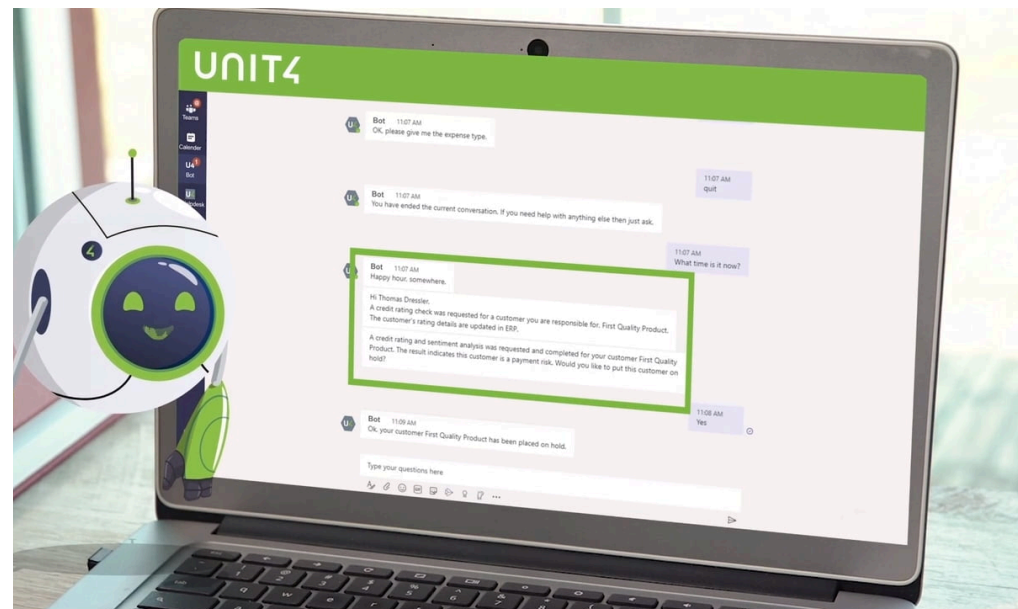
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What this demonstrates is that a program manager can use the AI and ML of a friendly bot to pull and interpret data from multiple platforms, spanning ERP, HCM, FP&A and Outlook, quickly and easily.

This saved the program manager hours of time analyzing data across multiple platforms.

But ultimately it shows how a very human problem can be solved quickly and effectively, using RPA.



Financial Management



Putting paid to late payments

Cash flow and accounts receivable is an important factor in any business. So making sure payments are made and received on time is vital.

A program manager takes on a new portfolio of projects. The first thing she wants to know is what shape they're in.

And that's where the friendly RPA bot steps in.

Job one is to see if any payments are overdue. The bot scans the portfolio financial records and finds a customer is paying late. Three months late, in fact. And it's not the first time. In the last year over half of payments have been late.

The bot suggests doing a credit check. The Program manager agrees.



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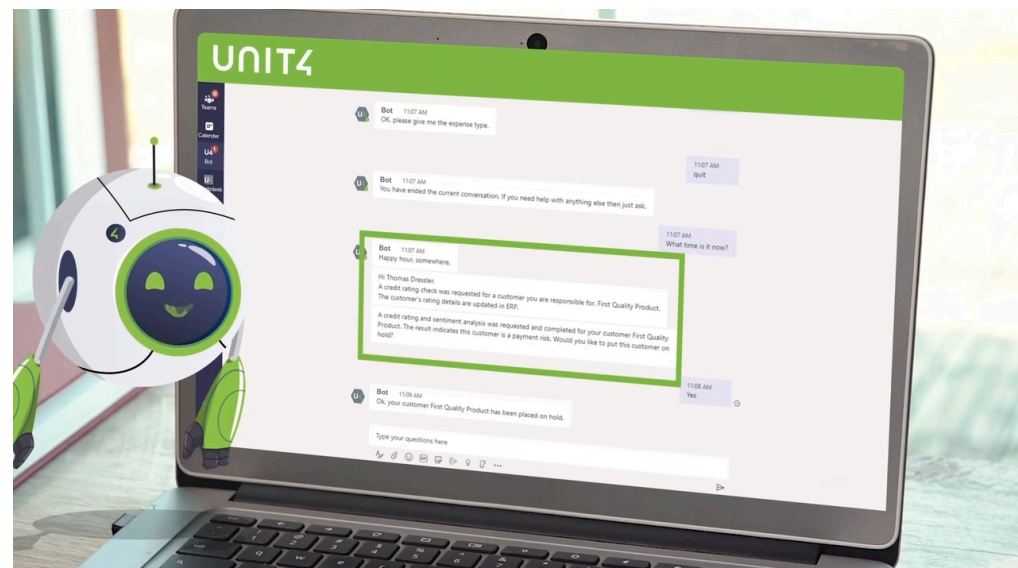
4. Talent Management

Pulling data from multiple reference agencies the digital assistant carries out a credit check. A negative check comes back. The program manager tells the bot to put the project on hold and to inform the client's account manager not to accept any new projects from this client until the situation is resolved.

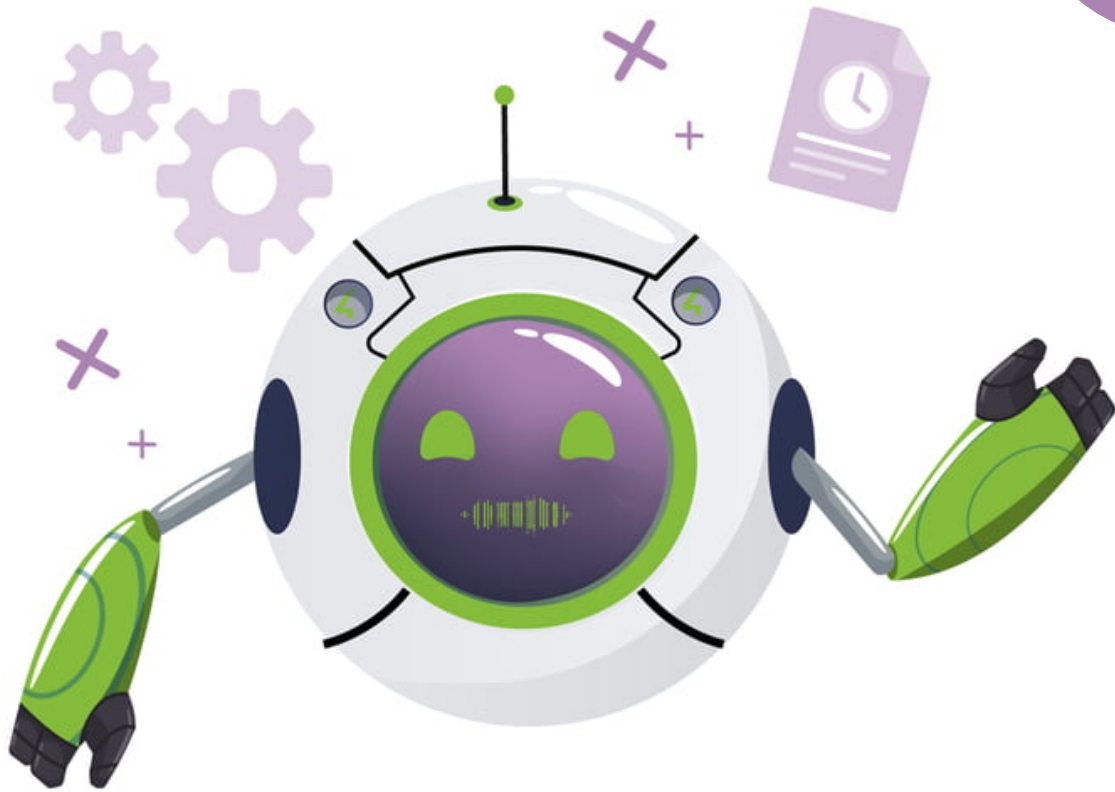
The bot gets it done in moments.

So when it comes to the thorny issue of payments, Smart Automation can quickly identify the root of the problem. The bot can use AI and ML to pull up and interpret data from multiple sources, including ERP and FP&A solutions as well as third party reference agencies, whilst using application extensions like Outlook and Teams to make sure all parties involved are informed and can take action when needed.

The outcome is a swift and painless resolution to a problem, without the program manager wading through analysis on multiple internal and external applications. Freeing her up to get on with more complex and rewarding tasks.



Resource Planning



Resource planning made easy

Resource planning can be a time-consuming, complicated and stressful job.

But it doesn't have to be that way.

Take this scenario. A service request email comes in for an electrical fault at a customer's offices.

Before the operators had time to open their service planner, your handy bot has stepped into the fray. They automatically add it to the planner in the unassigned work section.

The bot doesn't stop there. The bot's AI checks for available engineers, then sends a new service request to a field team lead on Teams.

The bot details the issue and the estimated time needed for the job.



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Next up, the handy digital assistant is showing a list of available operatives, with their match rates. The bot match rates each operator in seconds, using background analysis drawn from HCM and talent management solutions, across:

- **Previous projects**
- **Certifications and skillsets**
- **Courses and trainings**
- **Overall feedback and job satisfaction**

The bot then asks the team lead to select an operator for this project. Once chosen, the bot adds the work order to the service planner on the best available time slot.

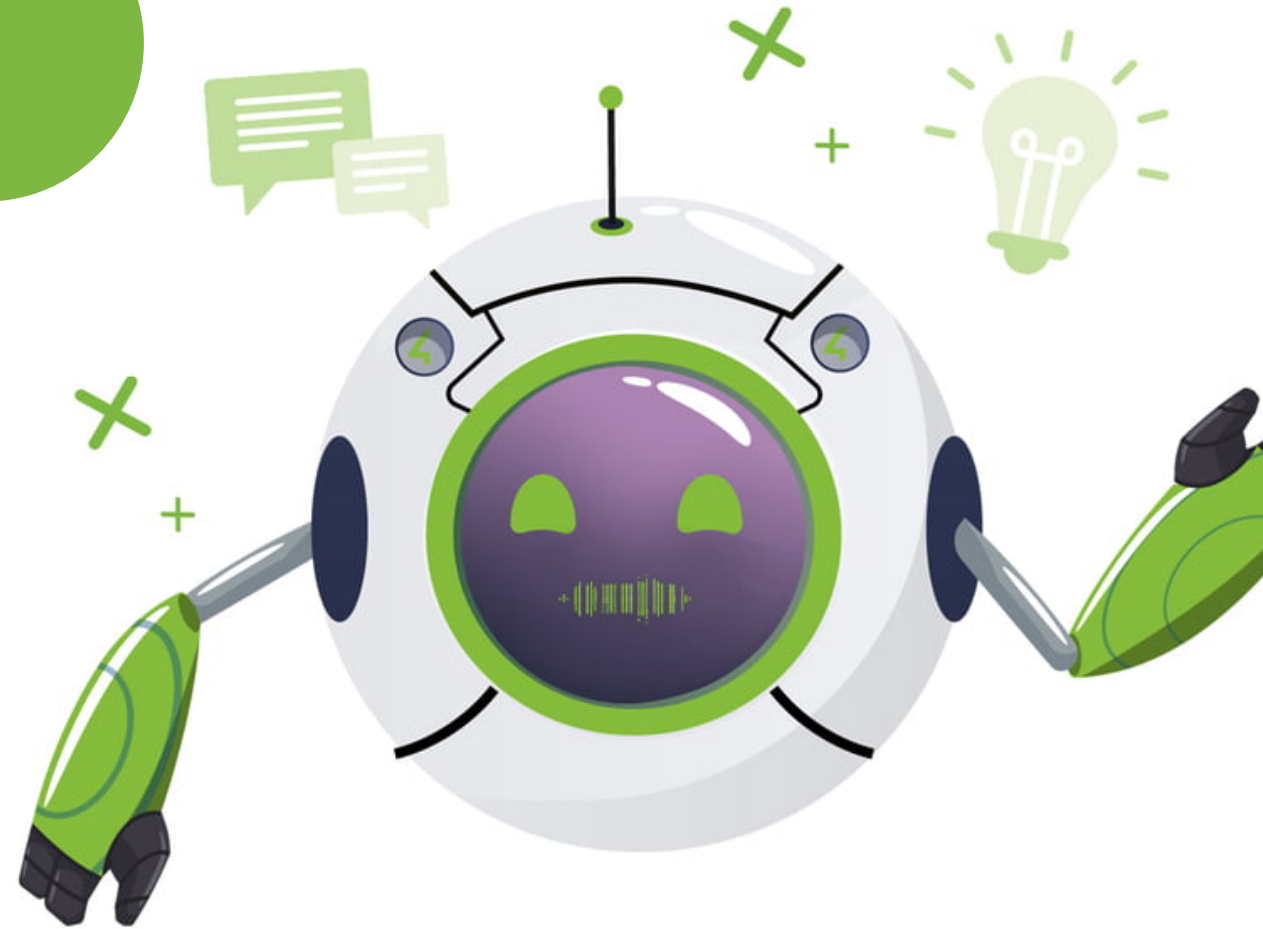
The busy bot requests confirmation from the customer. It then tells the operator that a new repair request has been scheduled and pops a placeholder in their calendar, along with the work order details.

All this activity powering along in the background. Effortless, frictionless resource planning in the blink of an eye.

RPA is a bot worth having.



Talent Management



Onboard new hires, seamlessly

Getting new hires onboard and up to speed is an HR headache.

Different employees require different set ups. Sorting out new user accounts, each with different access to applications, IT equipment requirements and security passes.

So an HR executive has a pile of new hires that are starting work next Monday. But none of them are set up with user accounts.

The exec needs to bring together data from multiple sources and feed it through the company's internal processes. The HR exec needs coffee. But what she really needs is a little robot friend with some RPA magic.



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Luckily she has just this and her bot gets to work.

The bot automatically activates the right template for the onboarding workflow. The bot then makes pre-programmed decisions on which credentials to assign to which employee.

The bot sends all the relevant onboarding documents to each employee to fill out. It sends a message to IT with requests for access to apps and IT equipment, specific to each new hire.

By the time the new employees arrive at their desk on Monday morning, their passes in their hands, their computers waiting to go, the phones pre-programmed with contacts – the new hires already feel like old hands.

So for your employees to really feel at home, sometimes it takes the robot touch.



Putting the bot in business

Businesses are all about the ingenuity and energy, the graft and imagination, of people.

Yet all too often the working day is drowned in a deluge of mind-numbing admin. Manual, time-consuming, repetitive tasks that make you want to tear your hair out, not release your human potential.

This is not the way it should be. The next generation business management systems have built-in bots inside that can transform working environments. Us bots can easily, reliably and quickly automate frequent, manual and mundane tasks. But also identify and anticipate the needs of you, the user, through AI and ML.



All as part of a fully integrated ERP, HCM and FP&A architecture, giving users the complete view across operations, HR and finance.

Trust me, with a bot in your business, constantly analyzing and forecasting, you can answer complex questions involving vast amounts of data, quickly and automatically.

Arming you with the time and knowledge to release your human potential. (slightly overrated if you ask me).

Told you, not bad for a bot.



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