How to Get Started – Blue Prism Methodology

PRE - SALE

POST - SALE

Intro to Digital Workforce®

Process Selection

Deep Dive

Business Case

Phase One Deployment

Strategic Roadmap

How to Get Started – Blue Prism Methodology

Introduction to Digital Workforce®
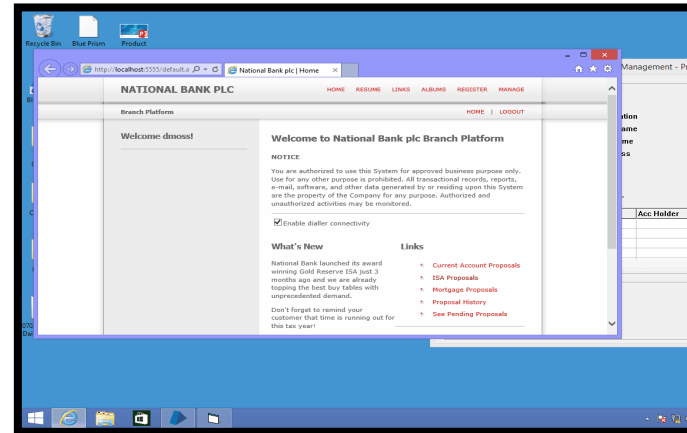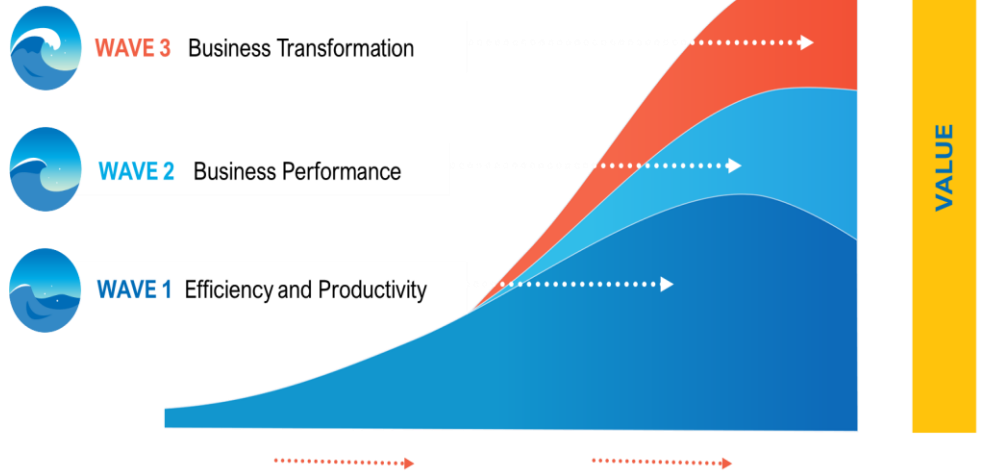
Why?

- Understand the concept and how it could deliver value

What?

- Blue Prism Overview
- Demonstration
- Typical use cases
- Example activities
- What next?

WAVE 3 Business Transformation

WAVE 2 Business Performance

WAVE 1 Efficiency and Productivity

VALUE

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Process Selection

Process	Process Name	Short Process Description	Systems / Applications Involved in the Process	Duration of Process (AHT) (Mins)	Frequency of Process (per day / per week)	How many people are currently working on this process
Process #1	Updating distribution payment and 1099 details	From list of distributions, open relius and each distribution transaction. Update payment details for each custodian and payment type, update 1099 info, update fees as necessary	Relius, excel	2-3 minutes	75/375	2
Process #2	Enter cash termination distribution requests into MPC	Identify list of distributions ready to process, login to MPC, open plan, find participant, enter distribution details	MPC, PlanConnect	5	50/250	2
Process #3	Enter loan requests into MPC	Identify list of loans ready to process, login to MPC, open plan, find participant, enter loan details	MPC, PlanConnect	5	50/250	2
Process #4	Classifying trust activity	Find trust deposits and disbursements matching with PC detail items and link them	PlanConnect	1 minute	500/2500	14
Process #5	Enrollment Form Enter	Download enrollment forms from document vault, save to directory, enter into MPC	PlanConnect document vault, MPC, read form	5 minutes	20/100	1
Process #6	SFTP Files load to vault	Look for new files in multiple SFTP directories, upload file to document vault for correct plan	File Server, MPC	2-3 minutes	30/150	1
Process #7	Reversing eligibilities from a list of file	From Relius' global transactions, select the appropriate eligibility transaction(s) and select the "Reverse" button	Relius, excel list		not feasible to do it manually on an on-going basis	
Process #8	Download Trust reports	Login to the custodian's website, navigate to the statement section, select the plan, select the report to download, save to client's directory	Custodian's website, File Server	2-3 minutes	# of Clients per month quarter year	2
Process #9	Update checkbox after fund changes	Open the plan in Relius, select Plan Specs, select each distribution type, navigate to the 3rd tab Trading/Suspension, select source/investment button, select "All Investments" button, save	Relius, excel list	2-3 minutes	variable - when a large group of plans have fund changes	1-2

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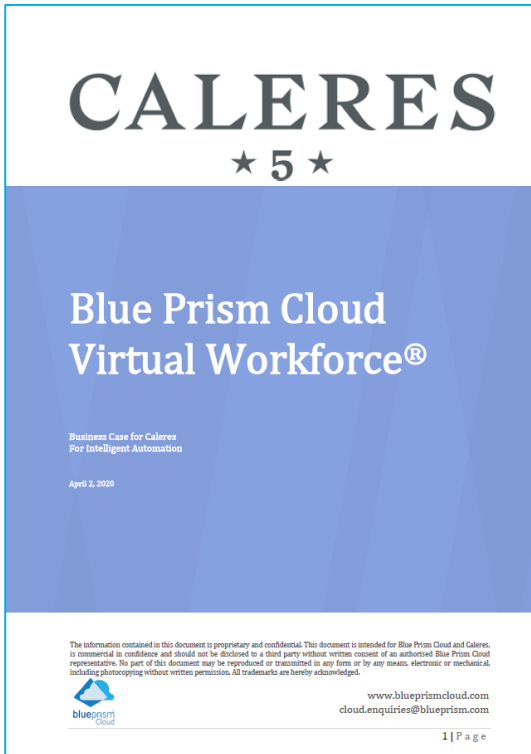## Deep Dive
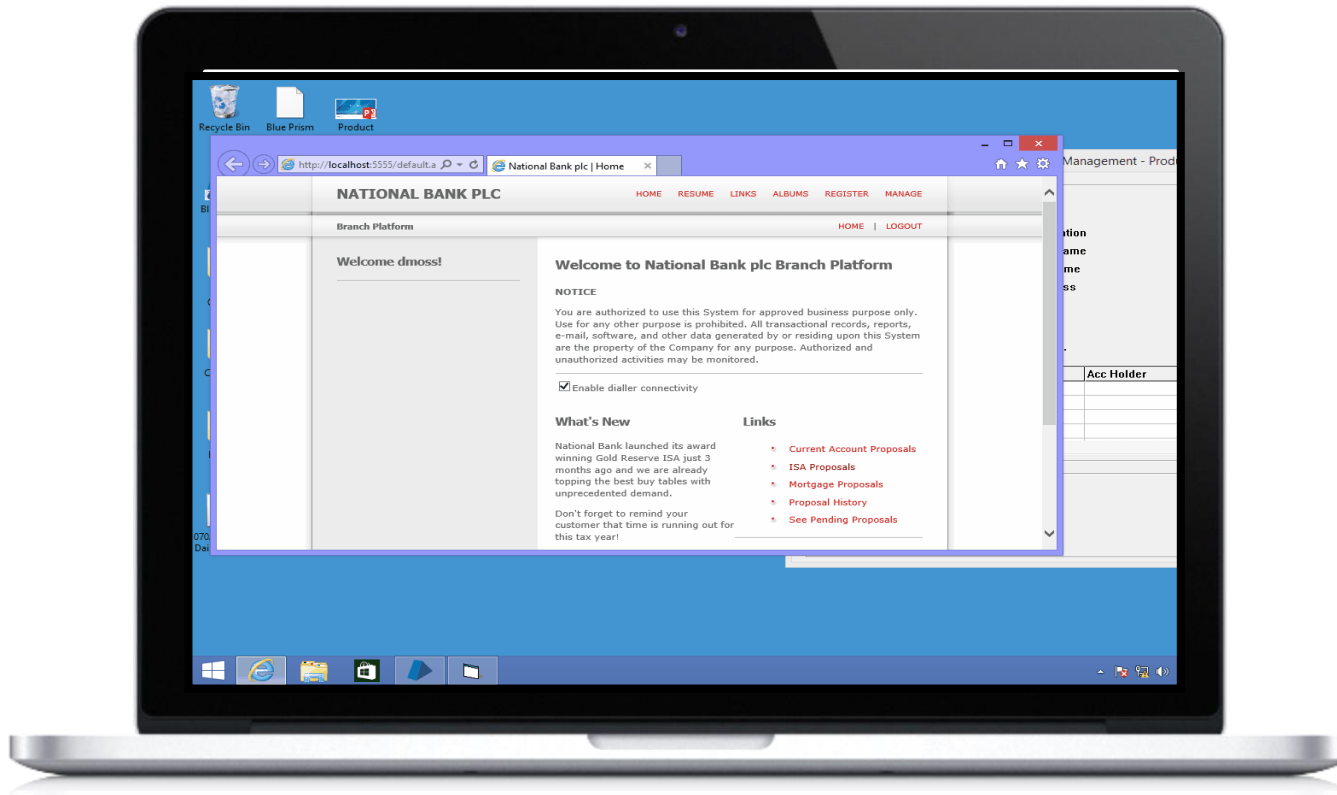
Why?
- Validate viability and complexity

What?
- Detailed process walkthrough
- Identification of applications and systems in use
- Evaluation of Time to Automate (TTA)

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Business Case

6. **Caleres Cost Savings**

36 Months Analysis

Projected Savings: $1,841,103

Projected Costs: $604,800

Total Costs Saving: $1,234,303

% Cost Reduction: 67%

This only includes the human element of processing. Additional business costs, such as application user licenses for outsourced employees, are not included, so the actual savings would be higher than these figures.

Current vs New Cost Profile for ABC Ltd

Baseline (Current) Costs — New costs
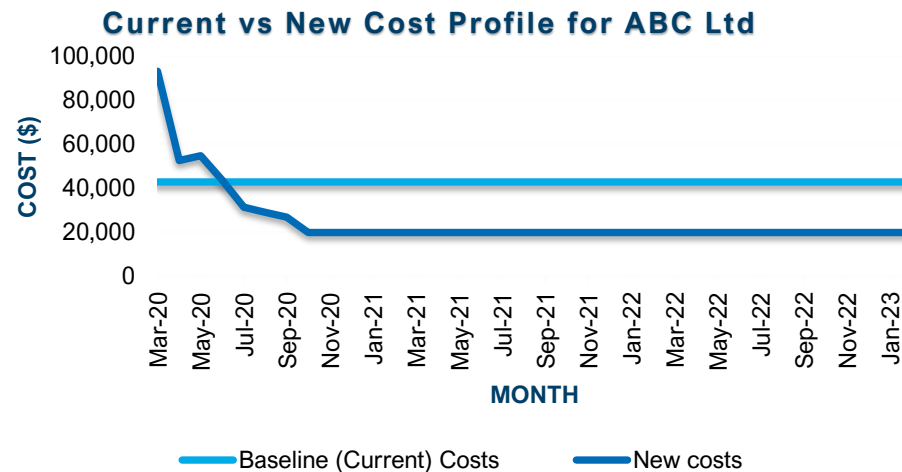
Why?
- Establish baseline as-is costs
- Establish effort and investment required
- Provide cost justification for platform

What?
- Proposal and business case for approval

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Phase One Deployment
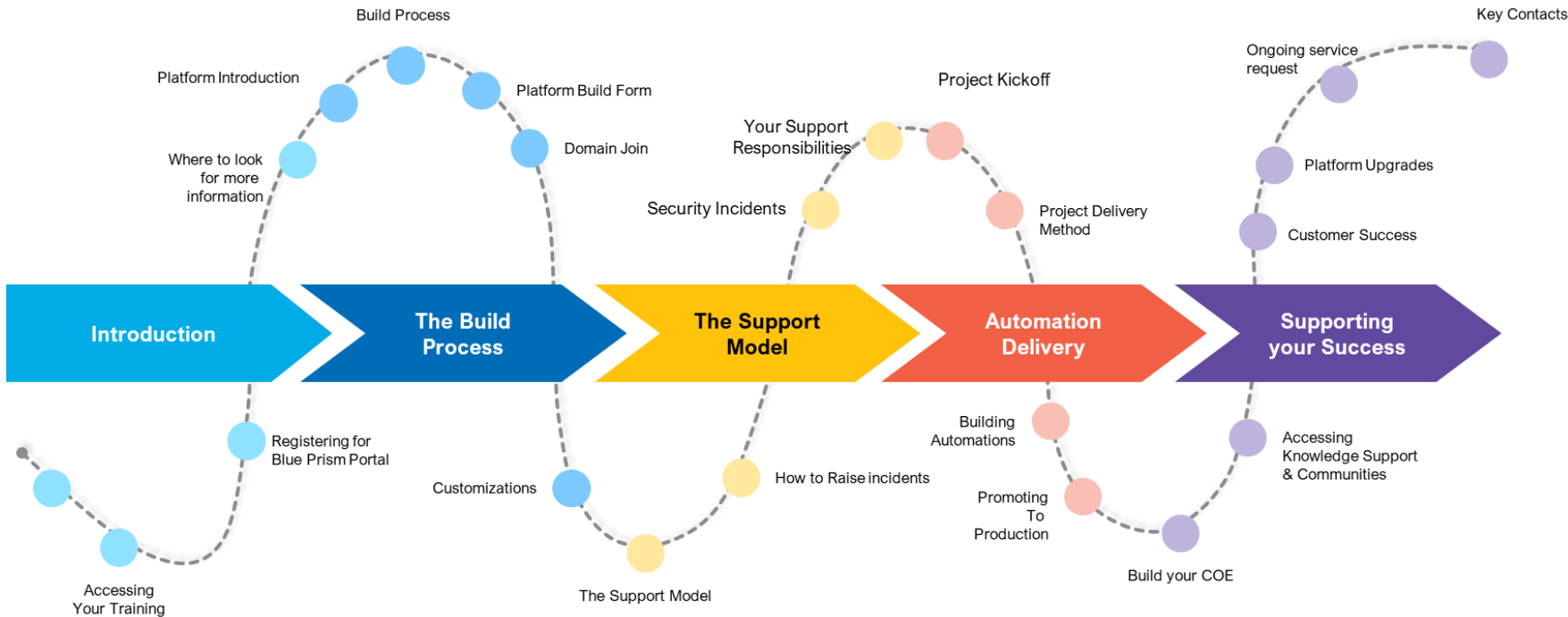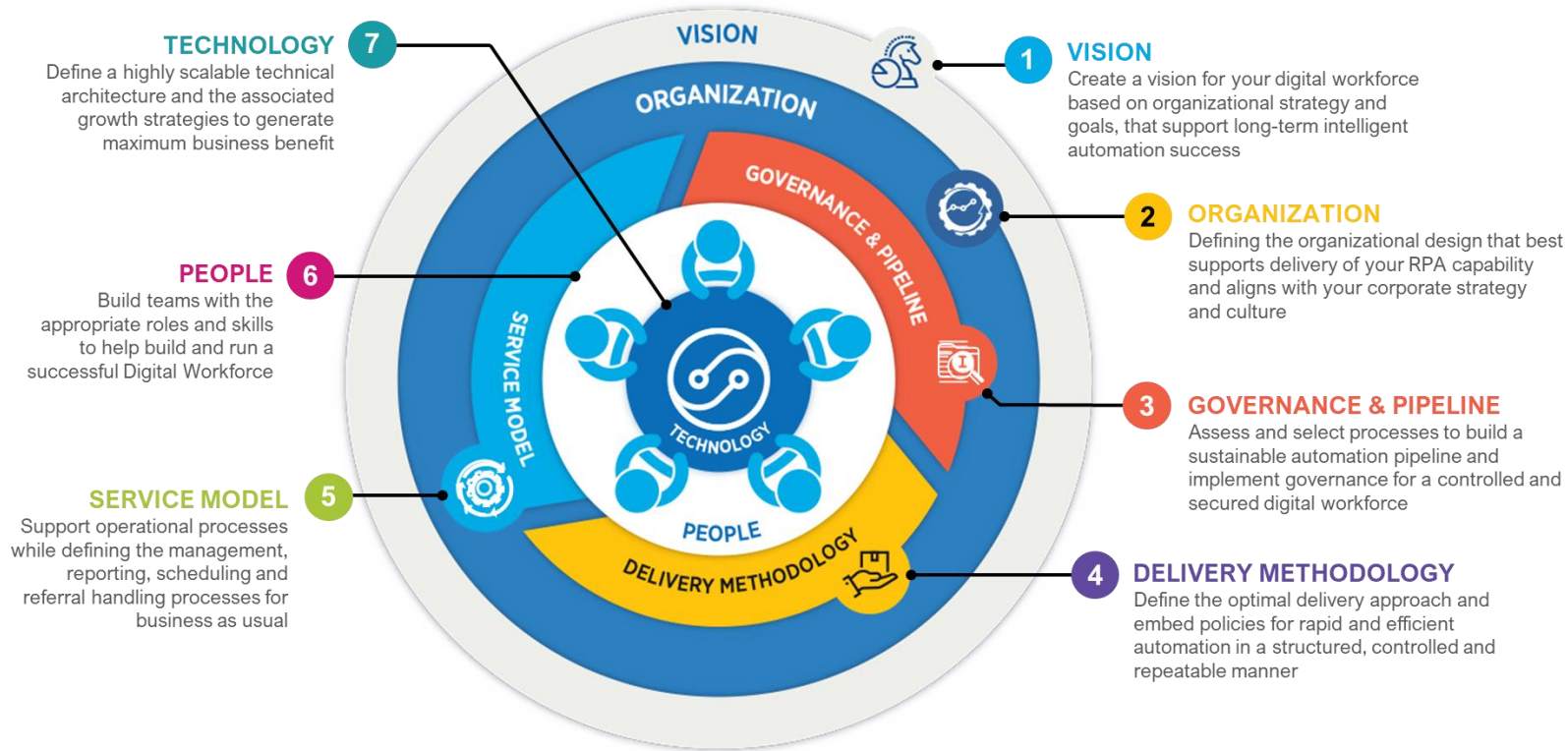

Why?
- Rapid deployment

What?
- Configuration of platform
- Implementation of initial process(es)
- Education and enablement
- Production running

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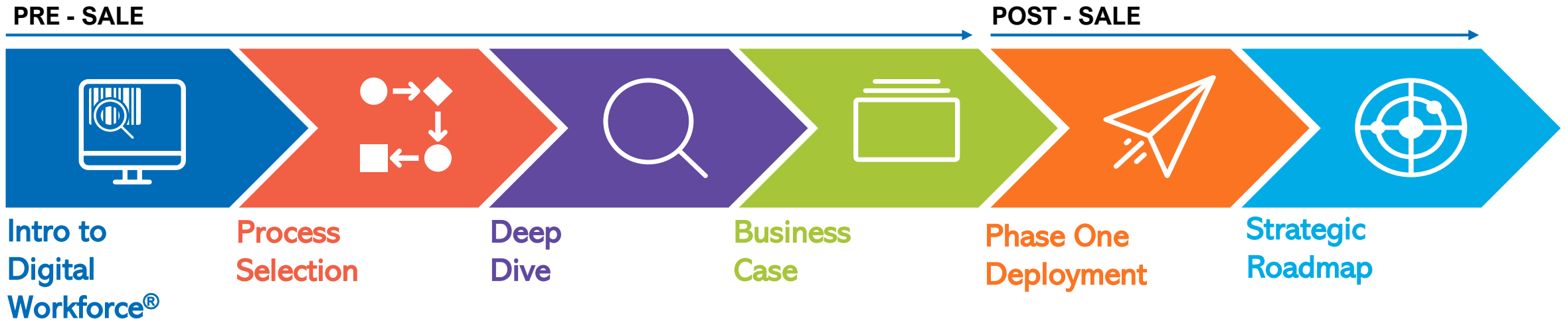## Strategic Roadmap & Robotic Operating Model (ROM)

TECHNOLOGY 7
Define a highly scalable technical architecture and the associated growth strategies to generate maximum business benefit

PEOPLE 6
Build teams with the appropriate roles and skills to help build and run a successful Digital Workforce

SERVICE MODEL 5
Support operational processes while defining the management, reporting, scheduling and referral handling processes for business as usual

1 VISION
Create a vision for your digital workforce based on organizational strategy and goals, that support long-term intelligent automation success

2 ORGANIZATION
Defining the organizational design that best supports delivery of your RPA capability and aligns with your corporate strategy and culture

3 GOVERNANCE & PIPELINE
Assess and select processes to build a sustainable automation pipeline and implement governance for a controlled and secured digital workforce

4 DELIVERY METHODOLOGY
Define the optimal delivery approach and embed policies for rapid and efficient automation in a structured, controlled and repeatable manner

VISION
ORGANIZATION
GOVERNANCE & PIPELINE
SERVICE MODEL
TECHNOLOGY
PEOPLE
DELIVERY METHODOLOGY

Why?
- Create a roadmap and plan for ongoing use

What?
- Strategic roadmap for Intelligent Automation
- COE creation
- Education and enablement

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blueprism®

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A Digital Workforce for Every Enterprise