



Building Cross-Functional Collaboration for Automation Success



This document looks at the importance of cross-functional collaboration to successfully scale your automation capabilities.

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About RPA

Robotic Process Automation (RPA) is the fastest growing segment of the global enterprise software market¹. Gartner estimates the market will reach nearly \$2 billion in 2021² with Deloitte suggesting that 72% of organizations will have begun their RPA journey by 2022³. This white paper looks at the importance of cross-functional collaboration to successfully scale your automation capabilities.

\$2 billion

RPA market value in 2021

Gartner estimation ²

72%

of organizations

will have begun their
RPA journey by 2022³



Introduction

Today, most companies are embarking on their RPA journeys with initial pilots and proof-of-value stages. Early benefits are demonstrated but moving on to scale automation across the enterprise is proving more challenging for many organizations.

The COVID-19 pandemic has further accelerated the adoption of automation technologies⁴ as organizations seek to remove manual, paper-based processes to build business resilience in a new reality of remote working, digital customers, and employee engagement.

Building the right team is one of the most important elements of taking the next step on the automation journey from initial trial to enterprise deployment. Research from McKinsey has found that companies that coordinate across business functions are almost three times more likely to succeed with their automation program⁵.

How can you best build the cross-functional collaboration that you require?



RPA at a pivot point

Geoffrey Moore introduced the phrase ‘**crossing the chasm**’ to describe the process a technology goes through to move from the early adopters into mainstream deployment⁶. RPA is currently at that precise pivot point. The initial excitement around the potential of RPA has pivoted into an understanding of its importance as a tool in the organization’s digital transformation toolkit with major organizations worldwide realizing its benefits.



Jane Heatlie, Digital Innovation Manager at Orbis says: “The business was very keen for RPA capabilities to drive efficiency in our back-end processes. IT wanted to ensure that they had some oversight and governance around that. So, a collaborative approach from the start was right for us.”

There are always challenges as major IT change programs move from pilot to enterprise deployment and RPA is no different. However, scaling automations require much closer cooperation and collaboration between the business and IT. Experience demonstrates that successful enterprise RPA implementations are built upon strong partnerships across the business, the IT department and with external RPA consultants and providers.

Yet, research from Forrester found that only 17% of organizations say that they regularly assess the alignment between business units, operations, IT and their dedicated automation function⁷. In fact, over 75% of organizations admit they don’t have a center of excellence (CoE) or equivalent function that bridges operations, strategy, training and technology related to automation⁸.

Orbis, a shared services partnership between Brighton and Hove, East Sussex and Surrey local authorities, has been underpinned by the establishment of a single cross-functional IT and digital service. Working collaboratively across the partnership has been key to the success of the service, with the development of common architectural and design standards, and the adoption of automation as core component of its digital architecture.

In many ways, the relationships you build are as important as your RPA technology platform when it comes to driving automation throughout your business to realize its full benefits.

“From day one, partner very closely with your IT and technology teams. You can do a lot of work in your CoE but you will not be able to deploy your robots without the strong partnership from IT colleagues and ultimately making sure that any environment you operate in keeps your bots healthy.”

Paula McKillen, Head of Automation and RPA – Electrocomponents plc

Building RPA success

Key drivers for RPA success:

- ✓ RPA seen as a strategic initiative for the business
- ✓ Senior management engagement and buy-in achieved early
- ✓ IT infrastructure optimized for RPA
- ✓ RPA infrastructure designed to scale from beginning
- ✓ Software reuse built into all RPA automations
- ✓ Business managers/users educated and trained on RPA
- ✓ Consistent method to surface process candidates and build sustainable automation pipelines
- ✓ Effective change and communications planning and management
- ✓ Training and education for business users part of RPA program and budget
- ✓ Operations and maintenance given same focus than development
- ✓ Strong integration with complementary technologies such as AI, machine learning, text analysis and process mining
- ✓ Consistent benefit tracking and realization

Automation is now virtually synonymous with digital transformation. When processes have been digitized the real value doesn't accrue until human input is minimized. Automating processes increases their quality, speed and flexibility while freeing employees from mundane and repetitive activities.

RPA is an incredible tool to have. With only a little experience, you can begin to create automations that create instant business value. Whereas traditional IT programs have been costly and taken months or years to deliver, automation can be lean and agile, developed and deployed in a matter of days or weeks.

However, to effectively scale your automations, these RPA capabilities have to be incorporated with wider business involvement and the disciplines associated with traditional IT programs. There are many drivers to RPA adoption but one piece of understanding is more critical than most: to succeed, RPA has to become an enterprise platform that is treated in exactly the same way as any other application in the technology stack.

The organization needs to understand which processes are suitable for RPA and create a mechanism to surface potential candidates. Subject matter experts, analysts and developers must work together to rank and prioritize candidate processes by business value, develop the ones selected and deploy them.

Orbis's Heatlie comments: "That's why a collaborative approach is absolutely the way forward. Business owners are in a much better place to spot the opportunities. They know their processes and they know how they use their business applications. What IT really brings to the party is running the environment in a production-ready way. For example, testing and deployment is a natural stomping ground where the business doesn't really have the experience."

The types of agile development and DevOps methods being adopted for other software programs, bringing IT and business together to create solutions in short sprints, are also ideal for RPA. You need to build the correct level of operating and maintenance resources—either within the automation team or drawing on the support from IT. Understanding the strategic, security and compliance implications of automation is also critical.

It takes commitment, engagement and collaboration for many parts of the business to deploy and scale RPA.

"RPA is not suitable all of the time. When you partner with your technology team you can identify the best approach for that specific process. My philosophy is to say yes to things that are definitely right for RPA and work together with IT to offer another route, whether technology or process redesign, when they're not."

Paula McKillen, Head of Automation and RPA – Electrocomponents plc



Establishing roles within your RPA operating model

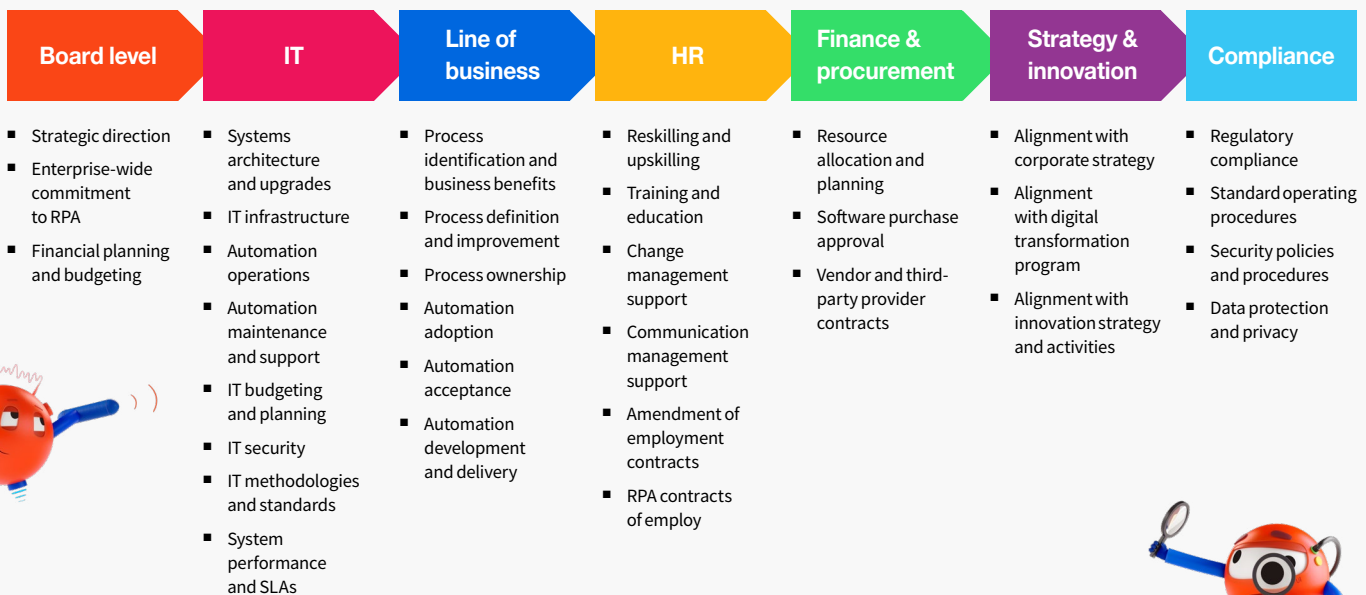
Many organizations build their RPA function around a central CoE that contains all the program management, design and development, business analysis and operation to manage an automation throughout its lifecycle. Others prefer a decentralized model with RPA functions in each business unit. Recently, a hybrid model is emerging that takes the best elements of both.

Whichever RPA framework a company selects, the constituent parts of the operating model are very similar ([Find out more about automation operating models](#)). At the top is the steering committee that brings in senior executive support from across the business. The automation CoE is responsible for the lifecycle of the automation. It works closely with the business units to encourage business engagement and the adoption of

automation. The IT department is very often responsible for the operations, maintenance and support of the automation once deployed.

In addition, there are several business functions that will be directly impacted by the automation team that need to be considered and involved as automation is scaled to the enterprise. It's highly likely that it will be the CoE that's responsible for achieving the required levels of communication and collaboration. At Finnish technology company Valmet, this was achieved through a cross-functional steering committee aligned to a CoE that included members from different business functions such as Finance, HR and IT to drive its RPA program.

Functional roles within RPA projects



As you move along your journey to RPA maturity, it requires careful planning to clearly understand the roles and responsibilities that each area of the business needs to play. Once understood, it's important that the automation team engages with each function at the earliest point and builds mechanisms so the function can contribute its input to make the program as effective as possible.

“Seeing is believing. It must be your own eyes and your own hands doing it. This builds real ownership within the function as people see what automation can do for them.”

Ahti Väättäinen, Manager of Financial Services Implementation and Robotics – Valmet

RPA and IT teams: the core partnership

By far, the most important partnership is between the automation team and the IT department. Put simply, any automation program that is designed to scale across the enterprise will need the support and commitment for the IT function to some extent. Automations that scale are doing the work of many people. They're touching many business-critical processes, enterprise applications and data sources—most of which are the responsibility of the IT department.

While the design and development of automations remains within the CoE for many organizations, the testing, version control, deployment, maintenance and support in the production environment is most often owned and governed by the IT department.

The responsibility of IT grows as automations scale. Most automations are improving business critical processes once live so it's essential that they are continuously available. The responsibility for system performance, availability and business continuity is likely to fall to the IT department.



Key elements of collaboration between the automation team and the IT department include:

Effective infrastructure

IT is responsible for the underlying technology infrastructure. Often, the IT department will require some training and assistance to fully understand how to prepare and optimize this infrastructure for automation. Understanding how to provide the correct infrastructure for your chosen automation platform will help the organization to achieve the highest levels of performance, scalability and stability.

Automation quality

With the correct infrastructure, it's highly likely that the quality of automations delivered will scale as the business grows. The result of using the correct infrastructure will be stable and reliable robots that accelerate business performance and build the confidence of business users to engage with and adopt automations both now and in the future. IT are skilled in software testing and can help build quality assurance into RPA development through the automated testing of automations to ensure performance and scalability.

"IT brings the rigor of running an environment and moving things from test to production, and looking at the entire lifecycle of applications," states Heatlie from Orbis.

In addition, it's important to properly consider software reuse in automation development and how reused automation code will operate when applied to new systems and operating environments. This will help speed the roll-out of your RPA program.

Budgeting and planning

As automation journeys often start with small pilots in individual business functions, the RPA function can develop more or less in isolation to the IT department. This can have a real effect within budgeting and planning where the two elements can be seen as competing for resources—impacting the performance of both. For example, automation teams might not be aware that there can be licensing implications when creating an automation for target environments such as SAP. Ideally, the automation team will work with IT on the budgeting and resourcing cycles to improve planning and capacity while reducing potential financial frictions.

IT security

Most automations are frequently accessing business critical systems and handling sensitive, corporate data. The highest levels of security are essential. This is especially true of the identity management and authentication of automations. The IT department is usually advanced in identity and access management practices and can help build secure automations that also access systems and processes without compromising their security. In addition, the recent SolarWinds cyberattack⁹ has placed more focus on the security of developer practices and development environments. As your automation program matures—perhaps increasing the number of citizen developers in your organization—it becomes more important that a central security element controls all new development within the organization.

"I think the business needs IT because of that whole life cycle management aspect. With automation, you're hitting production systems so you need to put some rigor around it. RPA is just another tool in the IT toolbox. There are other forms of automation and integration but there is a whole heap of other things that you can only tackle with RPA," says Heatlie.





“RPA is different from IT but you really need close cooperation with your IT team. We have an IT representative within our CoE. IT knows the infrastructure and the corporate systems. They can tell you how best to develop a robot for a specific system or which systems are changing or retiring so you can better plan the automation efforts. A good working relationship helps ensure higher quality, more effective automations. It has also enabled us to combine the power of RPA with APIs, delivering faster and more solid automations”.

Misael Viana, RPA Lead – NOS

Berke Menekli, VP Information Technology Emerging Markets at BSH Group says: “Coming from IT and a tough engineering company we like to ‘complexify’ things so we’re now attaching chatbots and process mining to our RPA capabilities. These are areas where we believe we can give additional depth to the solution.”

Skills and resourcing

Scaling your automation means having transparency in terms of the skills and responsibilities needed to move into production across the enterprise. Initially, the CoE will likely have staffed with developers, business analysts and subject matter experts. The next step requires the proper provisioning of operating and support services more often found within IT. Even where the CoE handles operations and support for its automations, the IT department will manage all the other components of the platform, such as the hardware, operating system and the databases. It is very rare that an organization builds a separate team within IT to manage this so careful consideration must be given to which skills are required, in what amount and where they will sit within the organization’s automation operating model.

Change management

Enterprise automations are business critical so require high levels of availability and business continuity. Your automation and IT teams must communicate and collaborate closely to ensure a smooth change management process, especially for upgrades to underlying systems that can affect the performance of an automation. For example, an upgrade of an ERP system may introduce new fields that are fine for the human user but may cause the automation to fail. Having a clear understanding of the IT team’s upgrade and maintenance schedules will allow your automation team to prepare and efficiently handle any changes.

Benefits realization

Take time to really understand what business benefits you want to achieve and how these are going to be tracked and reported. Only by comprehensive tracking will you have a clear view of the benefits realized. Your CoE should work with the steering committee, business unit heads and senior sponsors to fix the objectives and goals for automations. Once the KPIs are established, you should work with your IT department to measure and analyze results as they have visibility of automation performance and ownership of the applications on which the automation operates. It’s your IT team that can extract the logs and create the reports that show business benefits being achieved.

Governance

Every IT department is highly skilled in governing its underlying technology infrastructure. This can be an area of immaturity for many automation teams. The deployment of software and the ownership of the platform is an area where IT involvement can be very beneficial. With many years of creating and implementing IT policies and procedures, the IT department can help ensure enterprise automations comply with corporate standards and regulations.

Avoiding digital discrimination

Discrimination in the workplace is rightly frowned upon except, sometimes, when it comes to digital workers. When designing or upgrading systems, the IT team will work closely with business users to understand and deliver the type of experience they need. The result may be great for the human employees but not for their digital colleagues. Changes are delivered that users can easily adopt but stop robots, designed for the previous system, from operating. It’s important that RPA and IT work together to overcome this discrimination by including RPA in wider system design thinking and ensuring existing robots are always prepared for any system alterations.



Towards the democratization of automation

As organizations pass through the steps on their automation journey, more and more are beginning to look at the potential of citizen developers and ‘[a robot for every person](#)’. This democratization of automation where business unit developers and users start to develop their own automations opens the door to a world of possibilities for changing the way businesses operate.

This is a trend that’s happening in parallel as organizations look to customize and personalize the user experience for employees—something that Gartner has termed composable packaged business capabilities¹⁰. As IT leaders increasingly look towards how to empower the individual employee, this next generation of automation fits perfectly into the evolving models for the future of work.

Forward thinking organizations that have already instituted effective cross-functional teams will be able to build upon their existing partnerships and collaboration with IT and other business functions—especially HR and compliance—to facilitate the growth of citizen developers.

“I’m from the IT side and I need the business because they tell me what to automate. Even with citizen developers developing on the business side if I’m running the processes in the end then good communication is the key to being successful in the automation journey.”

Patrick Graf von Hardenberg, Professional Expert Robotic Process Automation – Otto Group



Conclusion

The COVID-19 pandemic shone a bright light of the benefits of automation to quickly advance digital transformation to cope with business disruption and changing business environments. According to Gartner, nine out of 10 large organizations expect to deploy some form of RPA in the next two years¹¹.

Moving from pilot to enterprise production is not simple but neither is it extremely complex. You require a well-planned and structured program that builds on the benefits of RPA technology and the disciplines of traditional IT program

management. RPA is, first and foremost, a business solution and it takes input and engagement from across the business—and from all levels of the business—to make it a success. Building cross-functional collaboration from the start is essential.

Getting this right will do more than dramatically boost your ability to successfully scale automations and realize the benefits. It will create the foundation for business and IT collaboration as your organization moves towards individual employee empowerment in the future.





About UiPath

UiPath has a vision to deliver the Fully Automated Enterprise™, one where companies use automation to unlock their greatest potential. Only UiPath offers an end-to-end platform for automation, combining the leading Robotic Process Automation (RPA) solution with a full suite of capabilities that enable every organization to scale digital business operations at unprecedented speed.

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