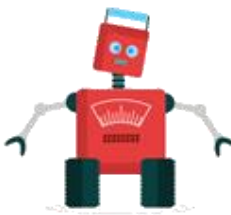
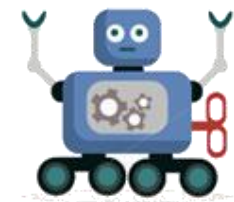


# CIPFA Conference

## Robotic Process Automation

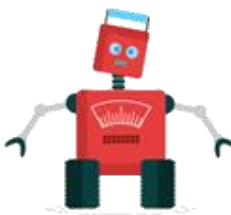
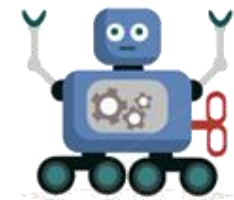
8<sup>th</sup> March 2018



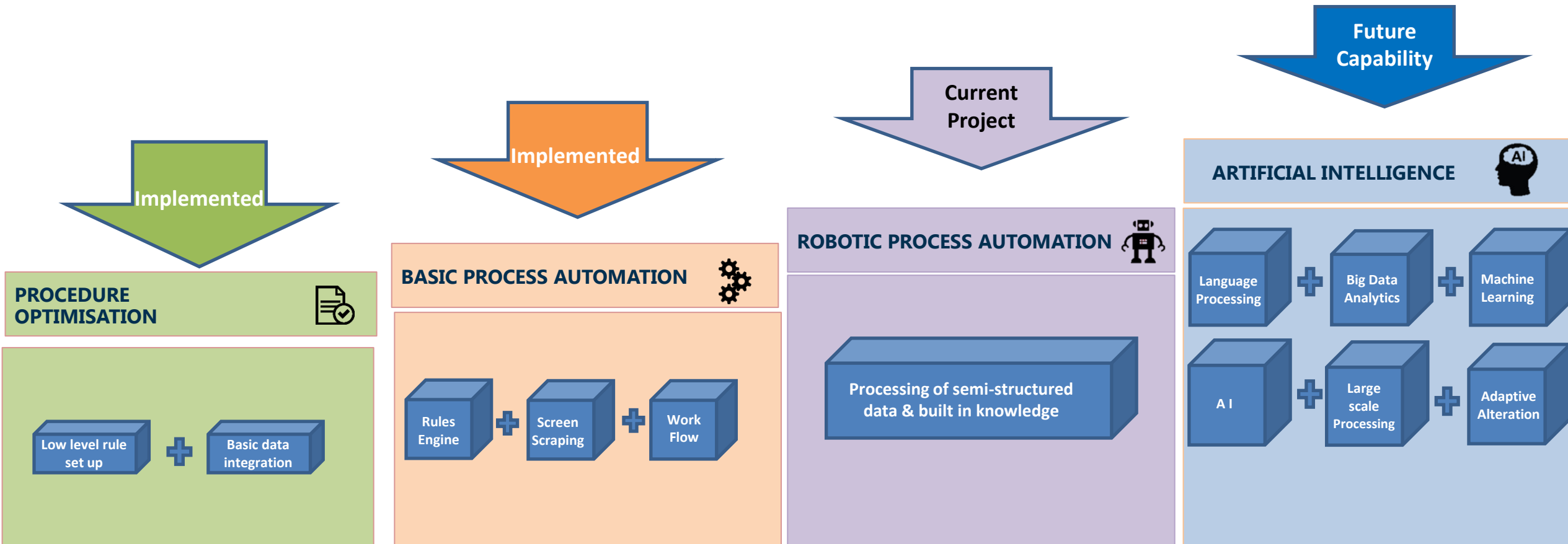
**Sarah Snowdon – Deputy Head of IT**

**Michael Burton – Transformation Manager  
(Adults' Health & Care)**

**Gary Westbrook - Head of Shared Services**



# The HCC Journey Towards RPA & Artificial Intelligence



# So what is Robotics and how does it work?

*“Robotics is the use of software to mimic the actions a person would perform on a PC”*



Emulates human execution of repetitive processes with existing applications



Robots are a virtual workforce controlled by the business operations teams



Robots can be trained by business users via configuration



Sits alongside existing infrastructure, governed and controlled by IT

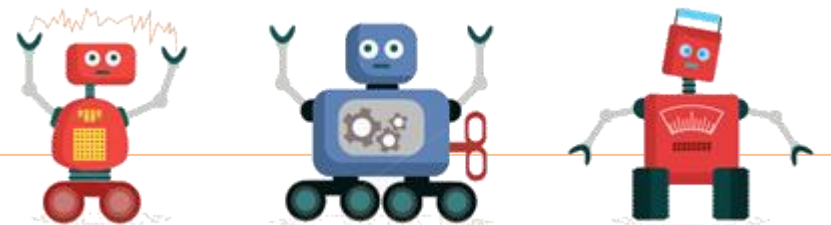


Robots work with existing IT architecture – no complex system integration

# The Robotic Process Automation Pilot

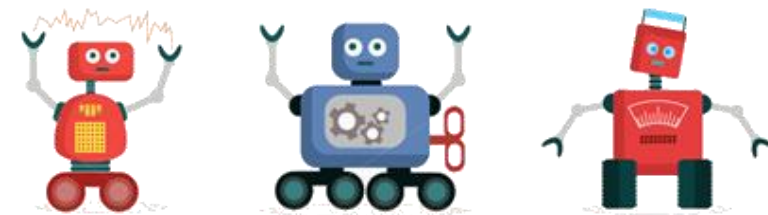
Robotic Process Automation was identified as a potential key enabler for revenue savings and productivity improvement. In order to justify project funding , a five week pilot was undertaken between 25th September and 27th October 2017.

- ✓ **IBC:** Pension Contributions and Journal Validation
- ✓ **AHC:** GP Referrals
- ✓ **ETE:** Highway Claims



# Michael Burton – Transformation Manager (Adults' Health & Care)

## Process 3 – Adults GP Referrals



# Process 3 – Adults GP Referrals

## Adult Social Care GP Referrals of Public Protection Notices

Receipt, risk assessment and dissemination of Public Protection Notices via Multi-Agency Safeguarding Hubs. Various action decisions can be made about PPN1s; this twofold process specifically covers where a GP referral is required.

Changes Required: **Medium**

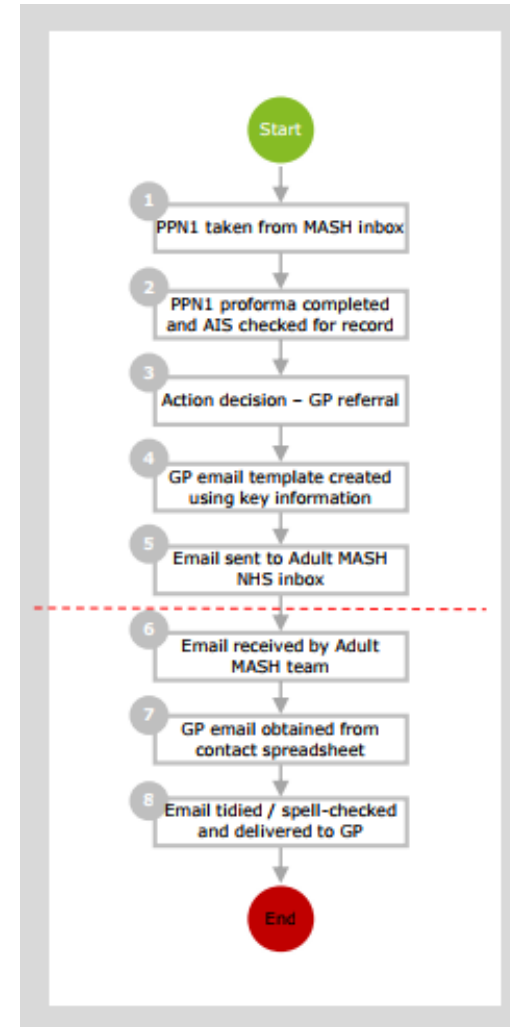
Overall Complexity: **Medium**

### Key Metrics:

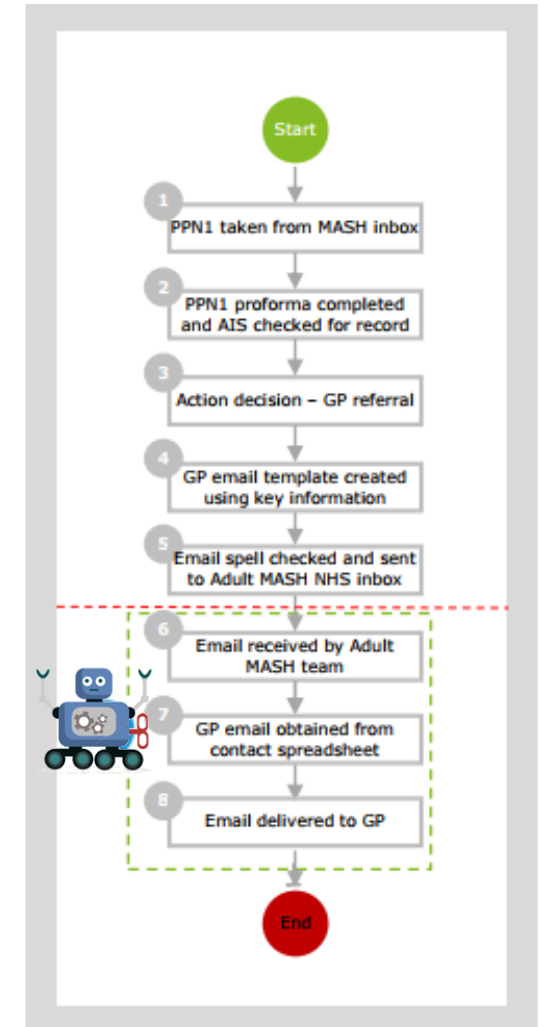
| Metric             | Value   |
|--------------------|---|
| Potential benefits | Performance improvement<br>Capacity generation<br>0.5 x FTE |
| Volumes            | 12 minutes per case<br>(10mins stage 1; 2mins stage 2)      |
| Time saved         | 2 minutes per case<br>(in current state)                    |
| Frequency          | Approx. 75 x PPN1s received weekly requiring GP referral    |
| Peak times         | N/A   |
| Peak volumes       | N/A   |



### Procedure Definition (AS-IS)



### Solution Definition (TO-BE)



## Process 3 – Adults GP Referrals (Continued)

Whilst the Adults GP Referrals process contained lots of human interaction there was still an opportunity to automate a section of the business process during the Pilot and to demonstrate potential savings.

A small automation can have a significant effect on how we serve the public. The introduction of automation for GP referrals will save enough time to triage an extra 5-10 cases per week. This will ensure a more timely response

However to fully benefit from RPA across our department, we would need to significantly change some of our business process and low-level procedures. Working Differently has been looking at this and how we can benefit from automation in its workshops with teams





# Lessons learnt, potential and approach

## Lessons learnt

- Importance of documented processes
- Importance of clearly defined rules
- Robotics can be applied to part of process as well as a whole process

## Potential

- To review and refine processes
- To automate more processes
- To reduce areas of risk
- To improve accuracy, consistency and efficiency in processing
- To free up capacity for colleagues to focus on more valuable work
- To reduce cost of processing transactional work



# Ideas gathering in AHC



Working  
Differently  
Workshops



Meetings



Other input

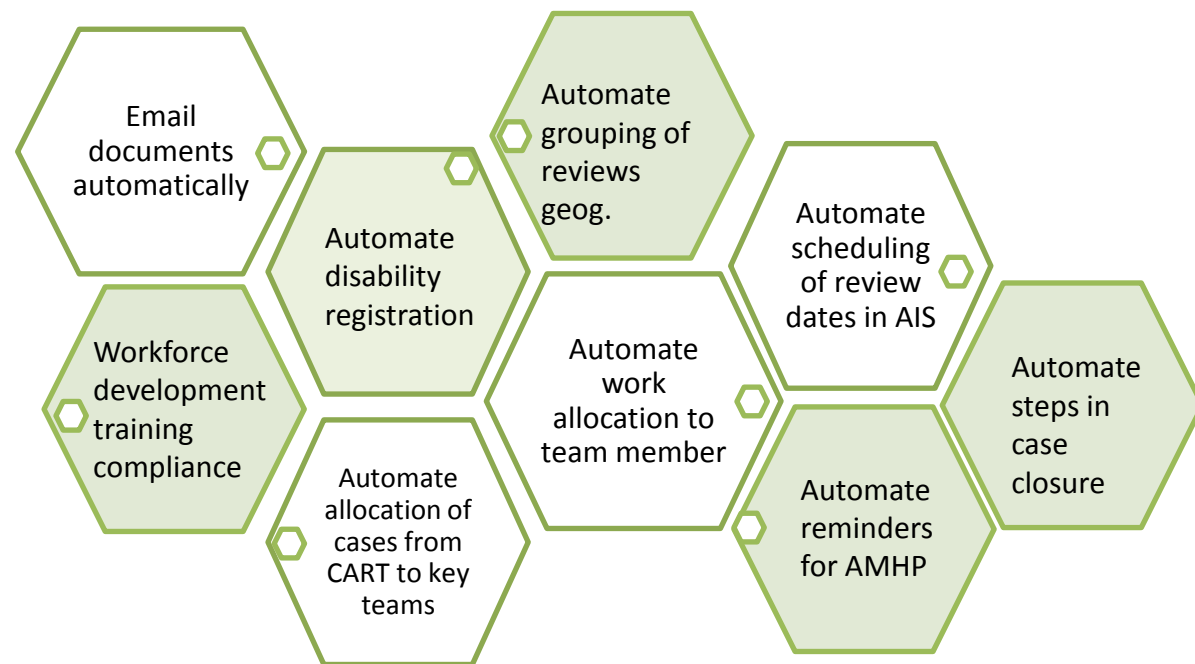


Prioritised list



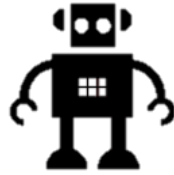
# How we prioritised

- **Very longlist of items with varying clarity**
- **Spreadsheet of items which are best defined**
- **Then rated (and colour coded!) on**
  - **Ease of implementation**
  - **Clarity of definition**
  - **Volumes**
- **For top items starting to work through benefit case**



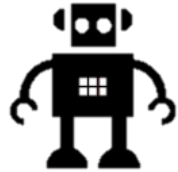
# Some of the higher priority ideas.....

Automate sending of documents to clients – email not paper



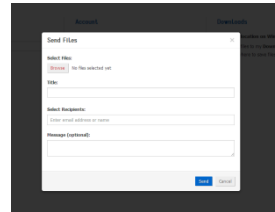
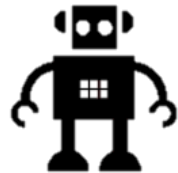
Admin time saving approx. 121,250 mins pa  
Postage savings approx. £24250 pa

Automate schedule of review dates in AIS



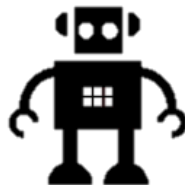
Admin time saving approx. 57,000 mins pa

Automate work allocation in key team to team member – 3 step process to 1 step

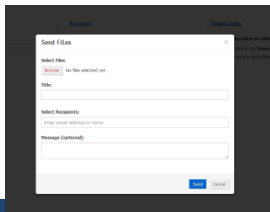


Admin time saving approx. 130,000 mins pa

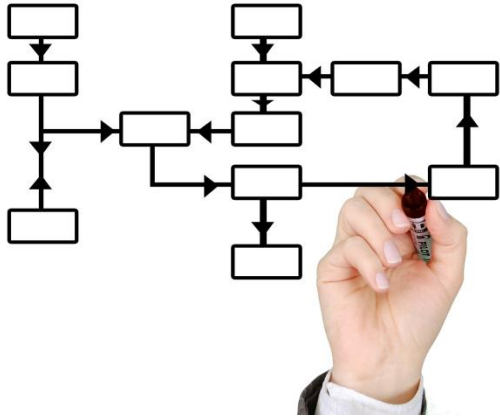
Automate allocation from CART to key team – based on postcode



Staff time saving approx. 130,000 mins pa

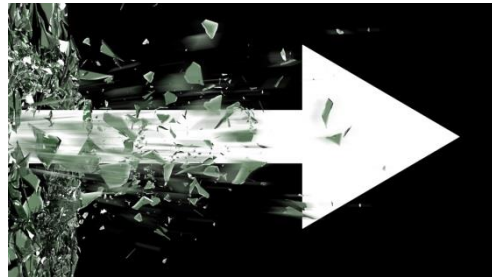


# Robotics in Shared Services



**The environment**

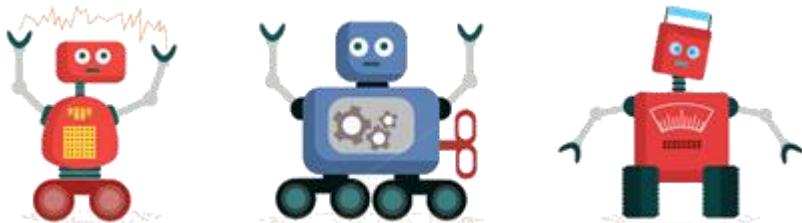
**Opportunities**



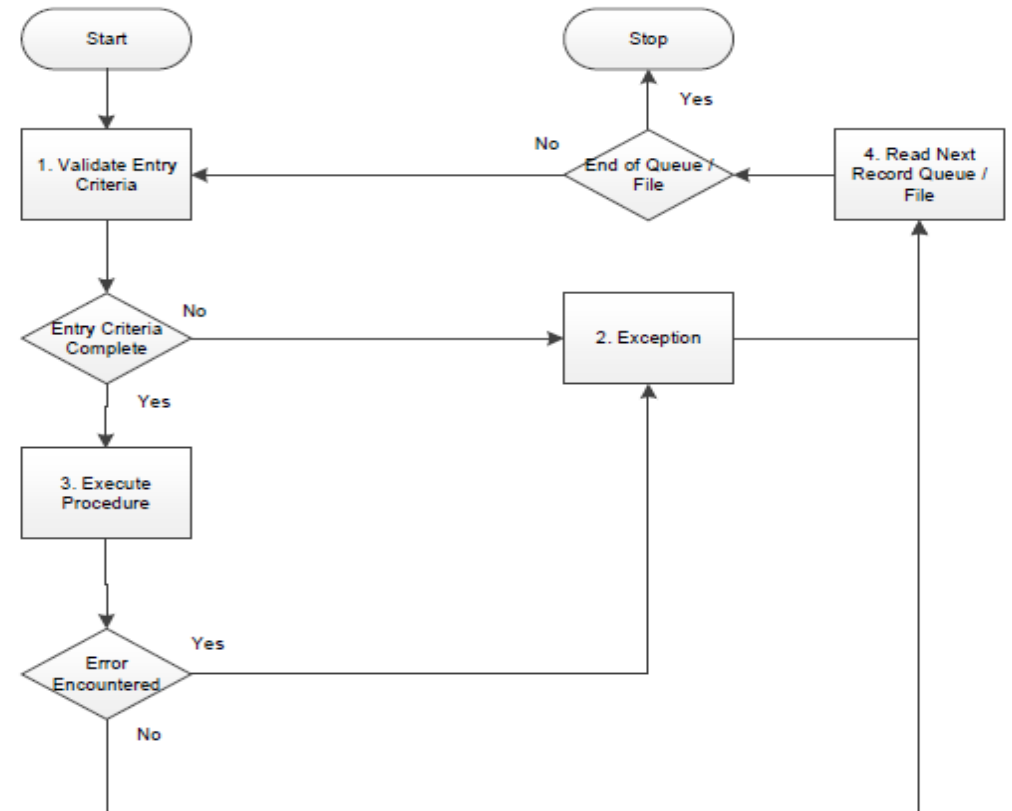
# Process 1 – SAP IBC

## Pensions reconciliation by the Integrated Business

Mid-month data input of Fire Pension employee / employer contributions into a spreadsheet and data transfer to different SAP cost centers via transaction FB50 and clearing GL Accounts through transaction F-03.



## Existing Process Diagram



# Process 1 – SAP IBC

## Pensions reconciliation by the Integrated Business Centre

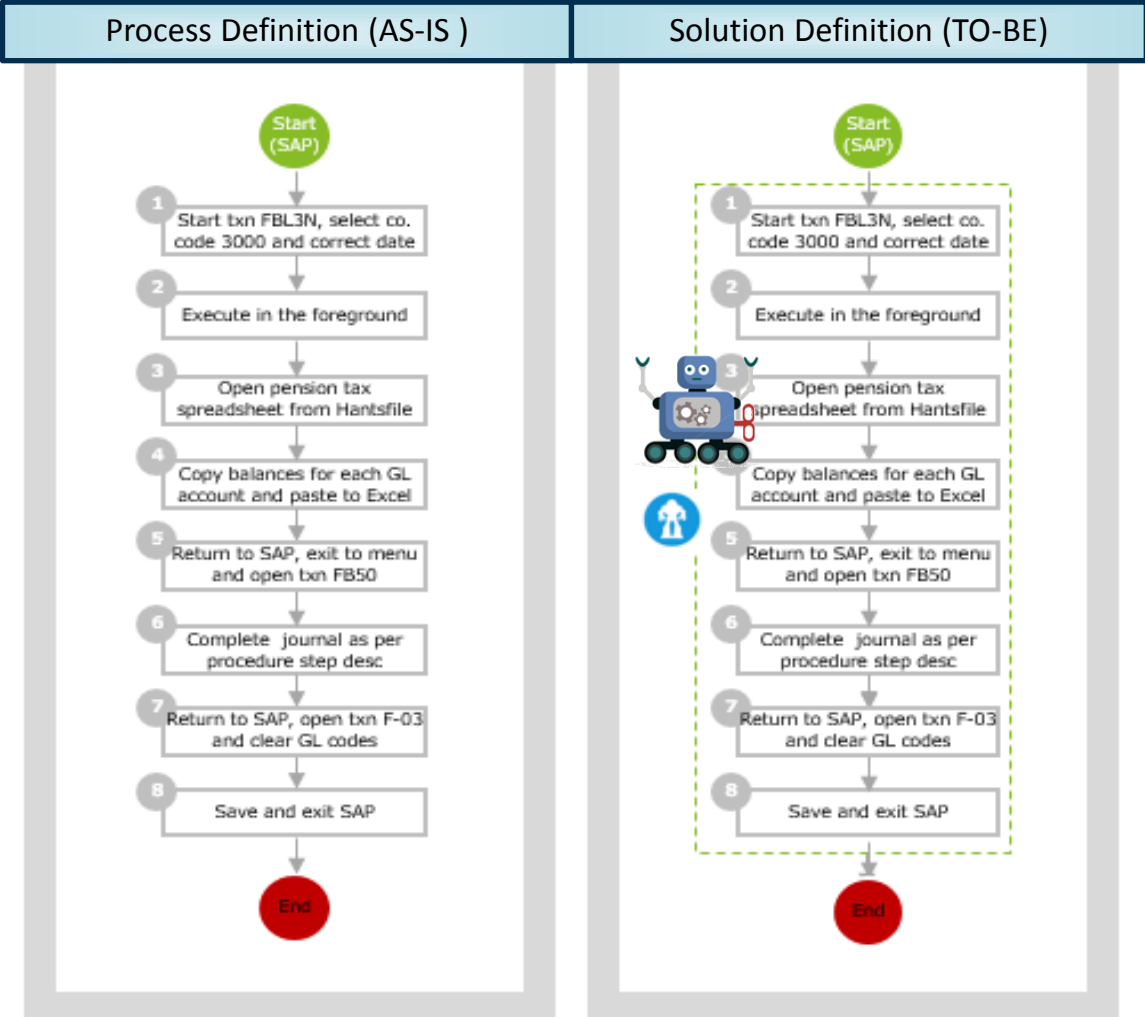
Mid-month data input of Fire Pension employee / employer contributions into a spreadsheet and data transfer to different SAP cost centers via transaction FB50

Changes Required: **None**

Overall Complexity: **Low**

### Key Metrics:

| Metric             | Value                              |
|--------------------|------------------------------------|
| Potential benefits | Performance / quality improvement  |
| Volumes            | 1 x monthly report – 30mins to run |
| Time saved         | 30 mins per report                 |
| Frequency          | Once per month                     |
| Peak times         | N/A                                |
| Peak volumes       | N/A                                |



# Play Video (SAP Pilot)



# Lessons learnt, potential and next steps

## Lessons learnt

- The importance of documented processes
- A time to review business processes
- Importance of clearly defined rules
- Pilot simple areas with potential to expand the Proof of Concept
- Manage expectations

## Potential

- Review and refine processes
- Automate more processes
- Reduce areas of risk
- Improve accuracy and consistency and efficiency in processing
- Allows people to focus on more valuable work
- Reduce cost of processing transactional work

## Next steps

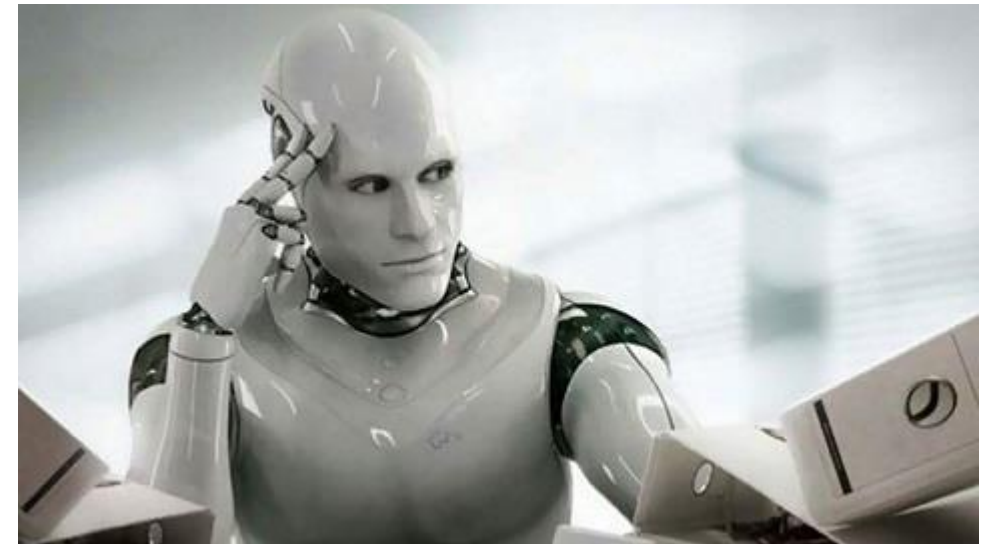
- Identify and prepare for further processes to be considered for RPA





# Final Reflections

**Taking the robot out of the person – What does it mean for finance teams?**



# Questions?

