## jos

JOS' Innovation Foundry Team

In JOS' innovation foundry team, we explore a range of different innovative solutions ranging to support the grow of the AI journey. One of the solutions the team offers is Robotic Process Automation (RPA), which is a technology solution specializes in addressing workforce optimization and automation, and it's the building block of the AI journey. In the future, AI and RPA will strongly complement each other where AI's prowess can be used in consuming data and making decisions, which can then be passed on to RPA to quickly execute.
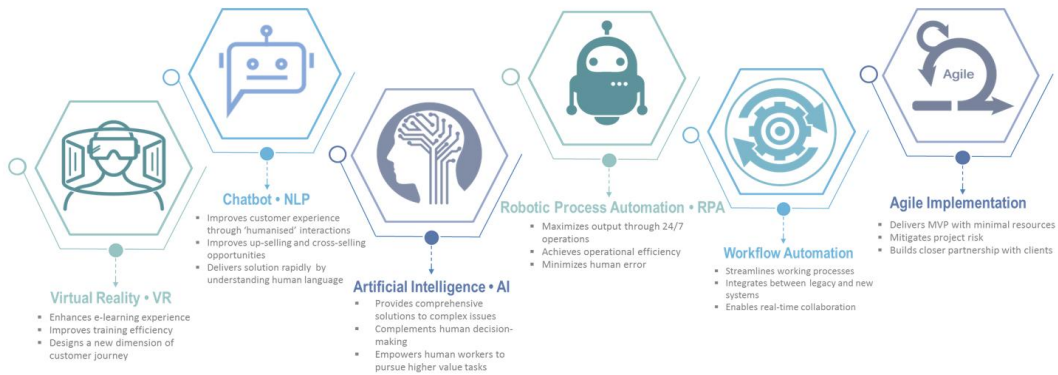

What is RPA?

RPA is a particularly hot topic across all industry segments. When broadly applied, it consists of a digital workforce that can handle tedious, time-consuming, manual and repetitive but necessary tasks at scale. Across all industries, RPA workforces are improving organizational efficiency by offloading live resources, improving accuracy, maintaining compliance and reducing costs.

What are the benefits of RPA?

RPA solution boasts a plethora of business benefits. Among the simplest are quick deployment and low reliance on IT, but most importantly, it leads to operational efficiencies, reduction of time and resources needed in completing tasks, process streamlining, and much more.
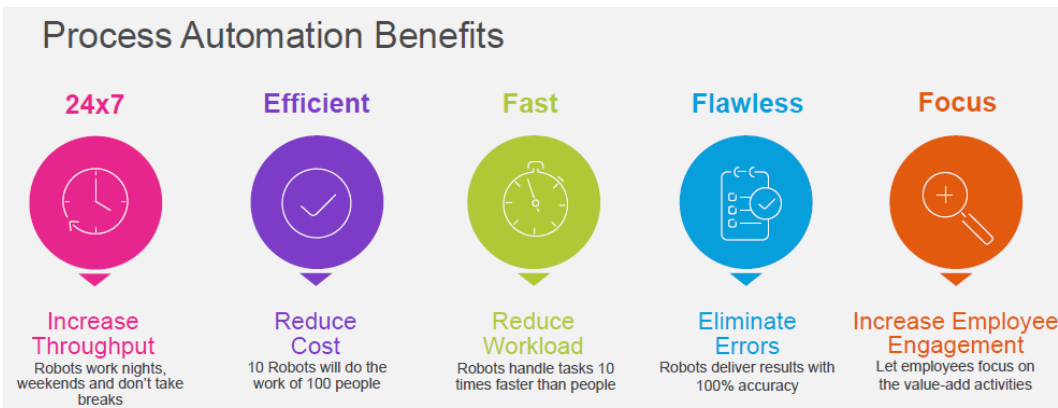
RPA applications are easier to deploy than many enterprise applications as they work with the presentation layer that a live agent or back-office worker would see rather than having to integrate with each application. They can:

- Utilize other applications without complex integration, allowing easy and affordable task management
- Cost effectively scale up or down without the business having to hire additional resources
- Reduce or eliminate repetitive, time-consuming tasks, including, but not limited to:
    o Basic form filling
    o Data Entry
    o Rekeying or copying data across multiple systems
    o Adding or updating customer records
    o Validating account information
    o Navigating through multiple systems and databases to consolidate data and reports
    o Routine checks or status updates to customers
    o Retrieving account records to answer billing questions

JOS Delivery Capability

Today, JOS already has the capability to deliver an RPA solution. With our standard engagement model, we can identify several processes in different areas that could potentially be automated. Our consultant will then host workshops with the users to create step-by-step captures of the processes, suggest what areas can be automated. If the business users agree on a pilot or a full project, JOS can provide a full range of services listed below:

| Service	Purpose
Project Management	Running the project with agile methodology where projects are split into 2 – 3 weeks sprints
Consultancy Service	Capturing user requirements, suggesting areas for automation
Implementation	Developing the RPA script according to the user requirements to automate the process
User Acceptance Testing	Ensuring the RPA script matches the user's needs and requirements
Deployment	Letting the process run live so it can start automating tasks for you

Consultancy Service:

A consultant can come capture the step-by-step screenshot of the process that it is today ("As is") and then after suggesting what parts of the process can be automated, what the new process would look like ("To be").

OCR Invoice Generation + Invoice & Delivery Note Process
- Business Challenges:
  - o Lots of manual steps to move data across excel, ERP systems
  - o Legacy macro developed for ages and no maintenance
  - o Induced unnecessary manual steps; for instance, ERP System prints documents in particular order while Excel Macro generates delivery notes in original order
  - o Printed documents are in different orders and requires time to manually organize
- Solution:
  - o Use RPA to automate steps of massaging the data within excel
  - o Using front-end integration with UI to move data across necessary ERP systems
  - o Use back-end system integration to systematically print documents in the correct order
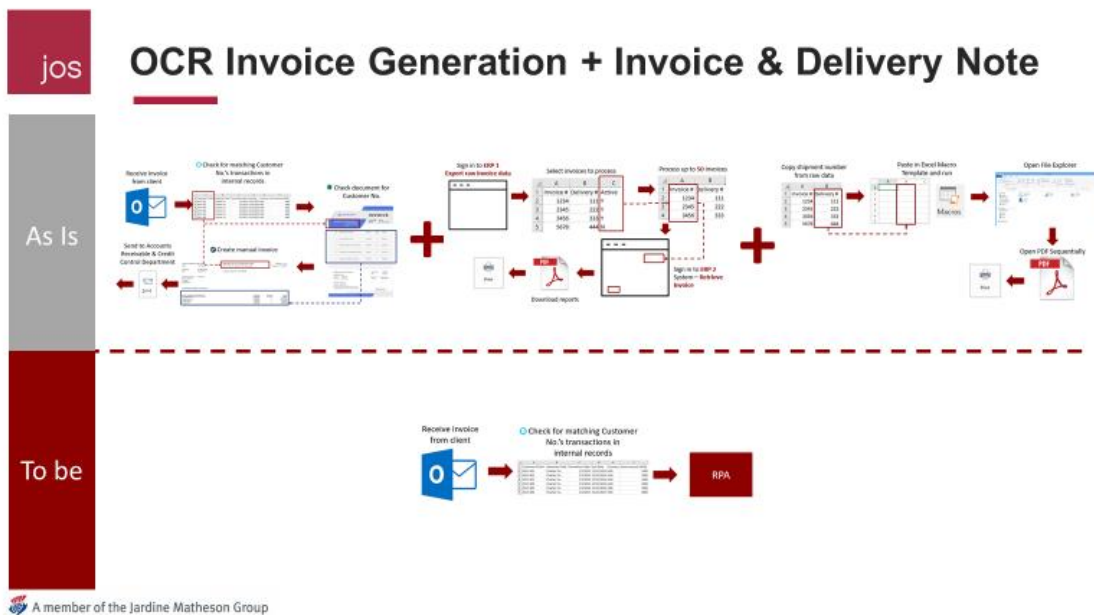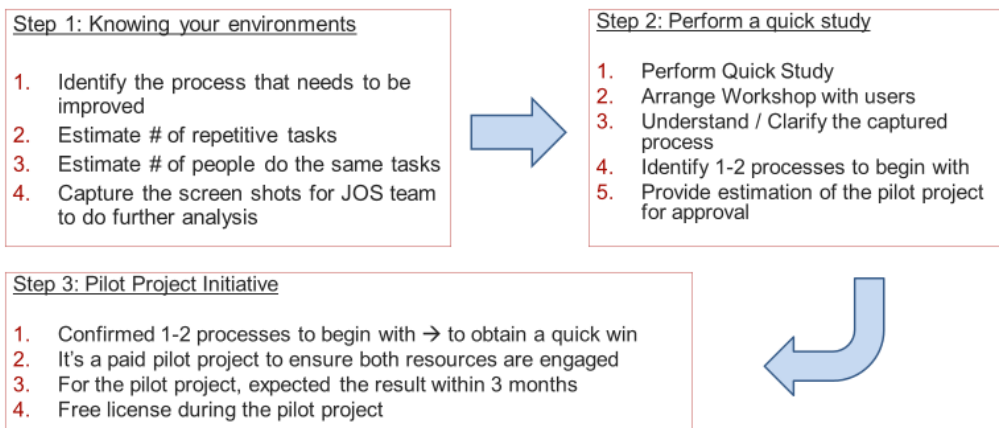
How to get started?

To get started, we are happy to discuss potential areas for automation with clients. If there are any high-volume tasks that are repetitive and manual, our consultant can come in and capture the processes right away. After processes have been captured, we can then start with a pilot project to build one or two processes. By the end of the pilot project, we will have a minimum viable product (MVP), and we can to continue automating more and more steps on top of that to streamline the entire process from head to toe.

jos **How to start?**

Step 1: Knowing your environments

1. Identify the process that needs to be improved
2. Estimate # of repetitive tasks
3. Estimate # of people do the same tasks
4. Capture the screen shots for JOS team to do further analysis

Step 2: Perform a quick study

1. Perform Quick Study
2. Arrange Workshop with users
3. Understand / Clarify the captured process
4. Identify 1-2 processes to begin with
5. Provide estimation of the pilot project for approval

Step 3: Pilot Project Initiative

1. Confirmed 1-2 processes to begin with → to obtain a quick win
2. It's a paid pilot project to ensure both resources are engaged
3. For the pilot project, expected the result within 3 months
4. Free license during the pilot project

A member of the Jardine Matheson Group

A checklist for evaluating whether a potential process can be automated by RPA

jos **7 Big Questions**

- Process Evaluation:
  - Defined Standard Operating Procedure — ❑ Yes ❑ No
  - Highly manual and repetitive? — ❑ Yes ❑ No
  - Require minimal decision making? — ❑ Yes ❑ No
  - Mature and stable? — ❑ Yes ❑ No
  - Fixed and set in stone? — ❑ Yes ❑ No
- Business Justification:
  - Are there high volumes to process? — ❑ Yes ❑ No
  - Will it save significant human work-effort? — ❑ Yes ❑ No

If you answer "Yes" to 5 or more, then it's a potential area for automation

A member of the Jardine Matheson Group

For any RPA inquiry, please contact us at HK-innovation@jos.com