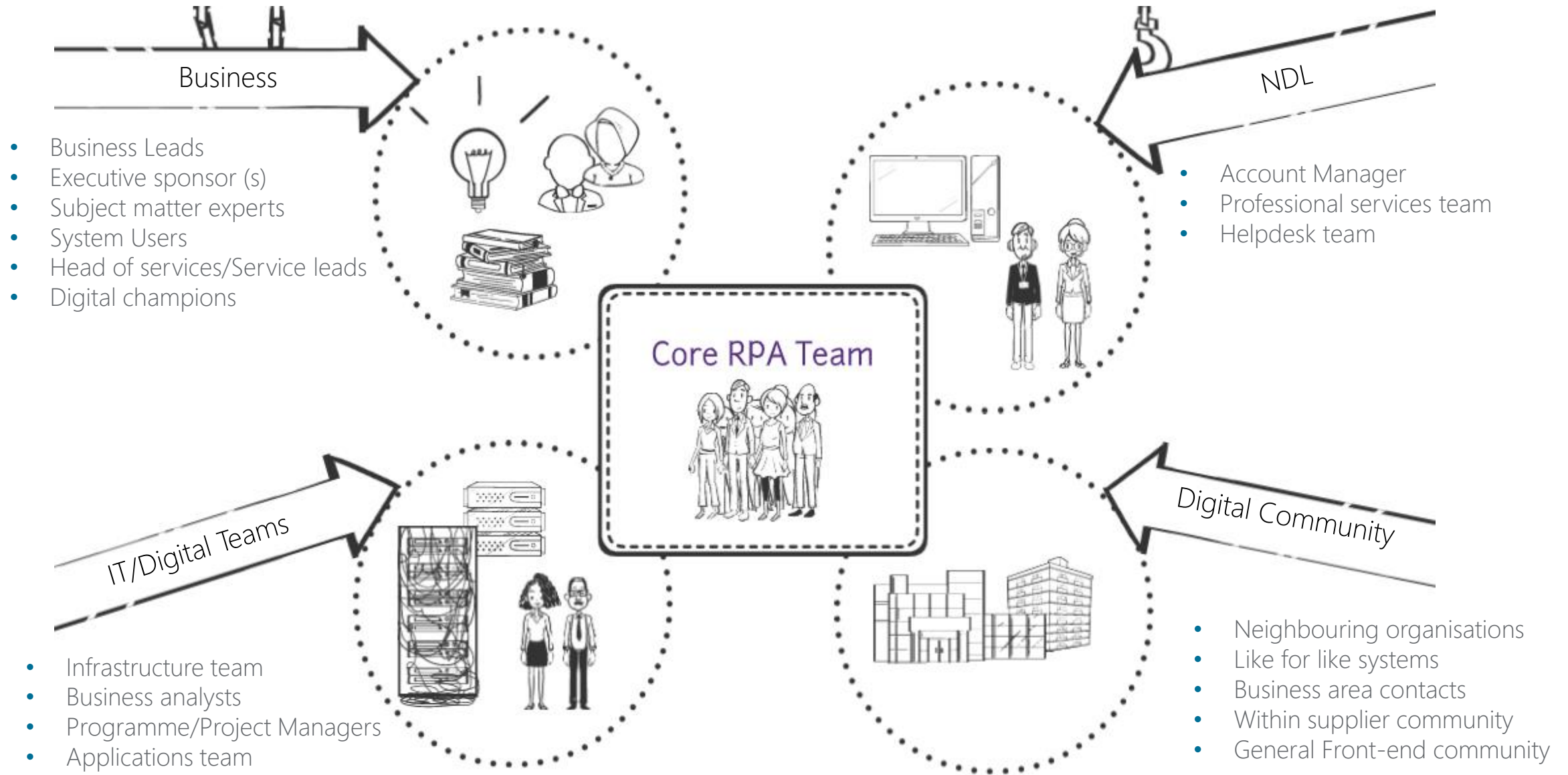




Welcome

RPA Best Practice Navigating the Path to Success in Local Government

Elizabeth Haigh – Business Manager
Connor Davies – Business Manager

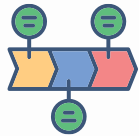


The Path to Success

Discovery



Readiness



Engage



Prove



Accelerate

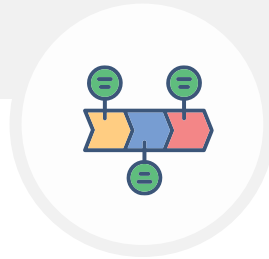


BAU



The Path to Success

Readiness

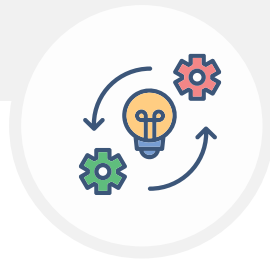


The Path to Success

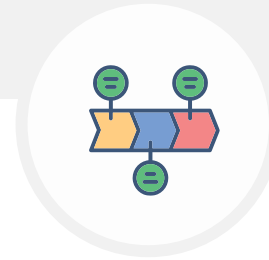
Discovery



Education



Readiness

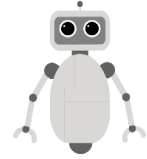


Share Learnings

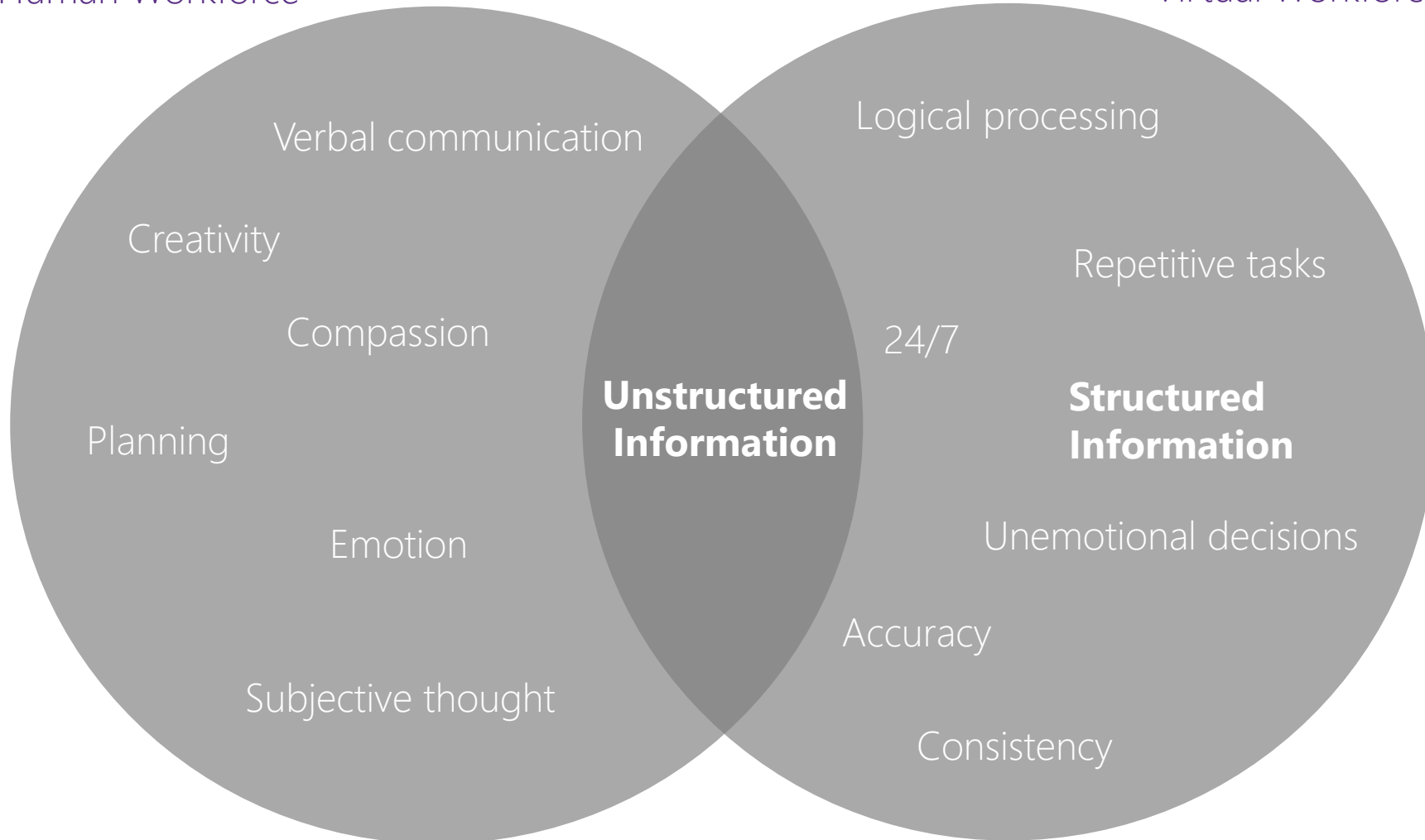
Key roles within an organisation



Human Workforce



Virtual Workforce



What are the options?



Rekey



RPA



Workflow



APIs

What is Robotic Process Automation (RPA)?

- Software robots execute rules based tasks
- Bots 'drive' the user interface of a system
- Can be used at scale
- Alongside user or not (Attended or Unattended)

What a Bot CAN do...

- **Automate repetitive tasks**
- Follow pre-programmed rules & logic
 - Follow complex workflows
- **Work quicker** than a human
- **Work more accurately** than a human
- Drive any system
- Work 24/7
- Scale up and scale down



What a Bot CANNOT do...

- **Think for itself**
- Learn
- Handle **unique scenarios**
- No interpersonal skills
- Problem solve
- Fix bad processes (without process refinement)
- **Speed up systems**



How can RPA be used?



Front-end Integration



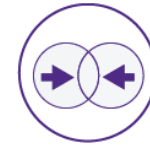
Migration



Synchronisation



Extraction



Data Integration

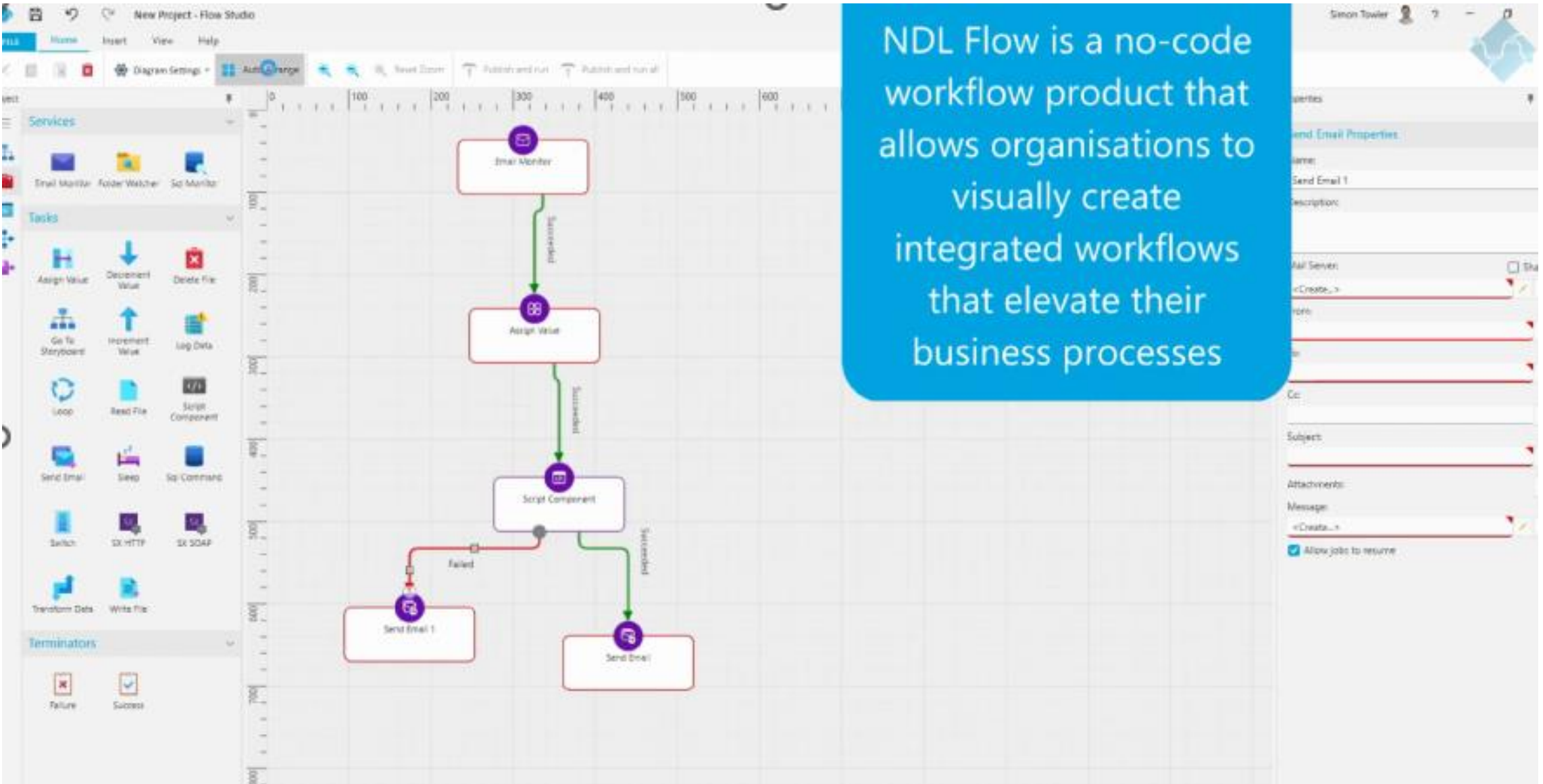


Intelligent Automation

How do we bring the landscape together?

- Front end to the back office
- Incorporating our human workforce
- Monitor inboxes
- SMS's
- Send emails
- Other workflows





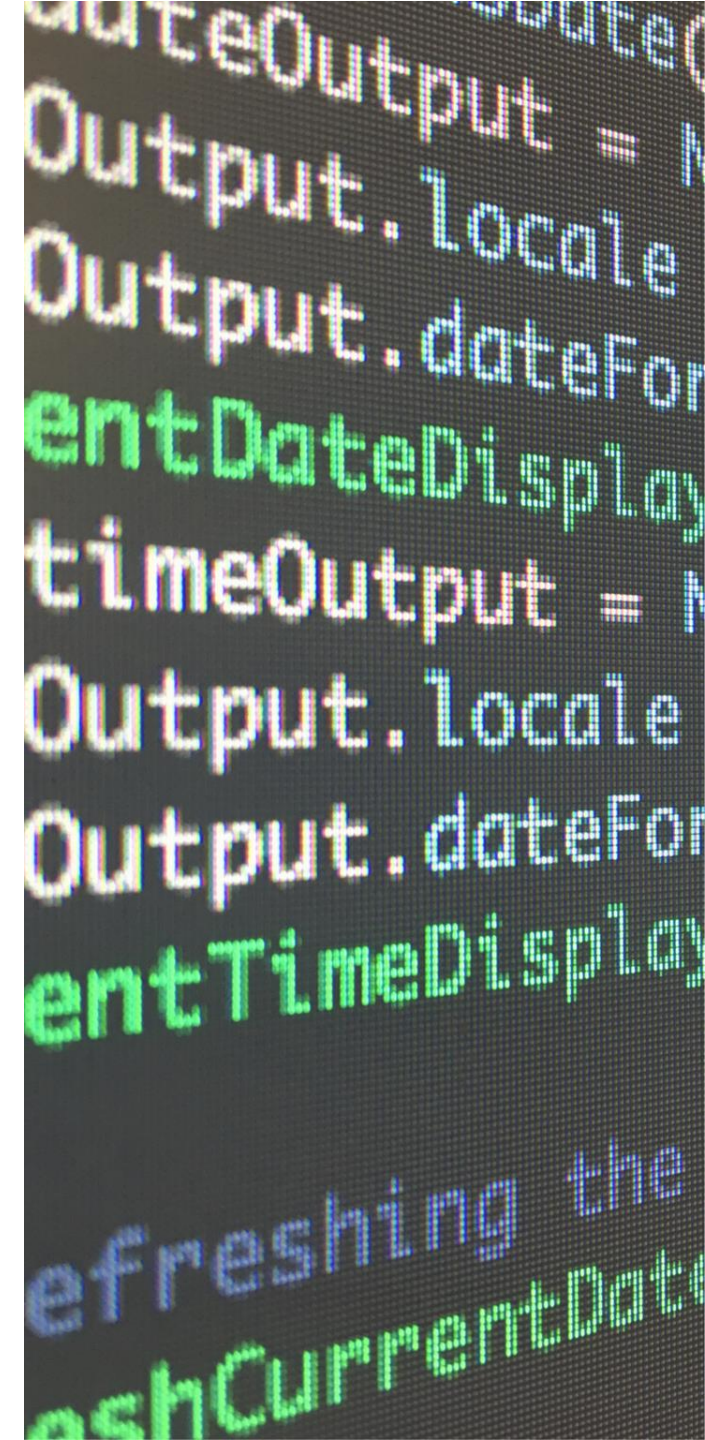
NDL Flow is a no-code workflow product that allows organisations to visually create integrated workflows that elevate their business processes

What is an API?

- Usually provided by vendor
- Allows software components to communicate
- Number of different types
- Most common RESTful, SOAP and web service connections

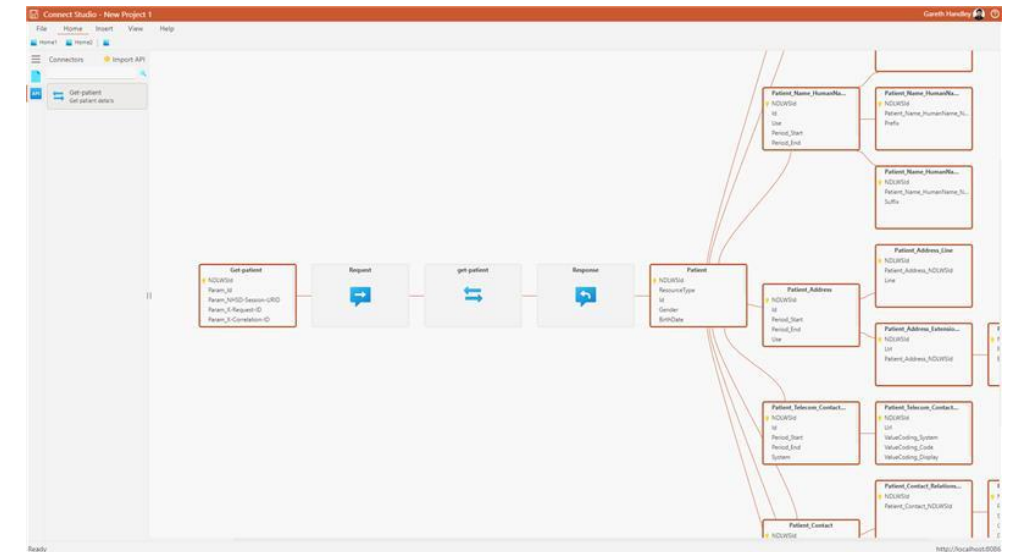
Are they the right choice?

- Are they available?
- Are they cost-effective?
- Does it do what you want it to do?
- If yes, **USE** them but:
 - Difficult to configure?
 - Requires complex development resource

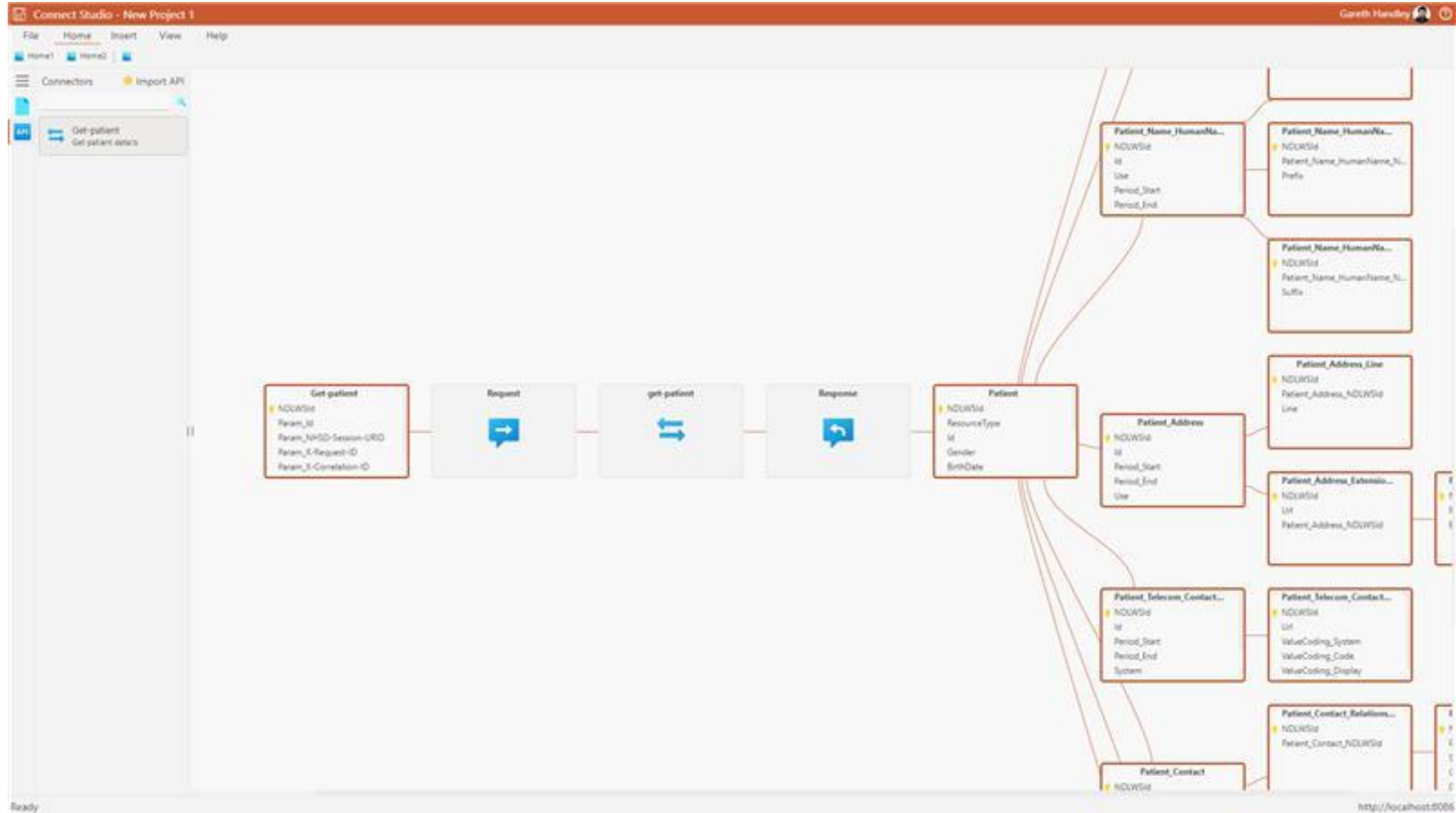


```
dateOutput = M  
Output.locale  
Output.dateFor  
entDateDisplay  
timeOutput = M  
Output.locale  
Output.dateFor  
entTimeDisplay  
efreshing the  
eshCurrentDate
```

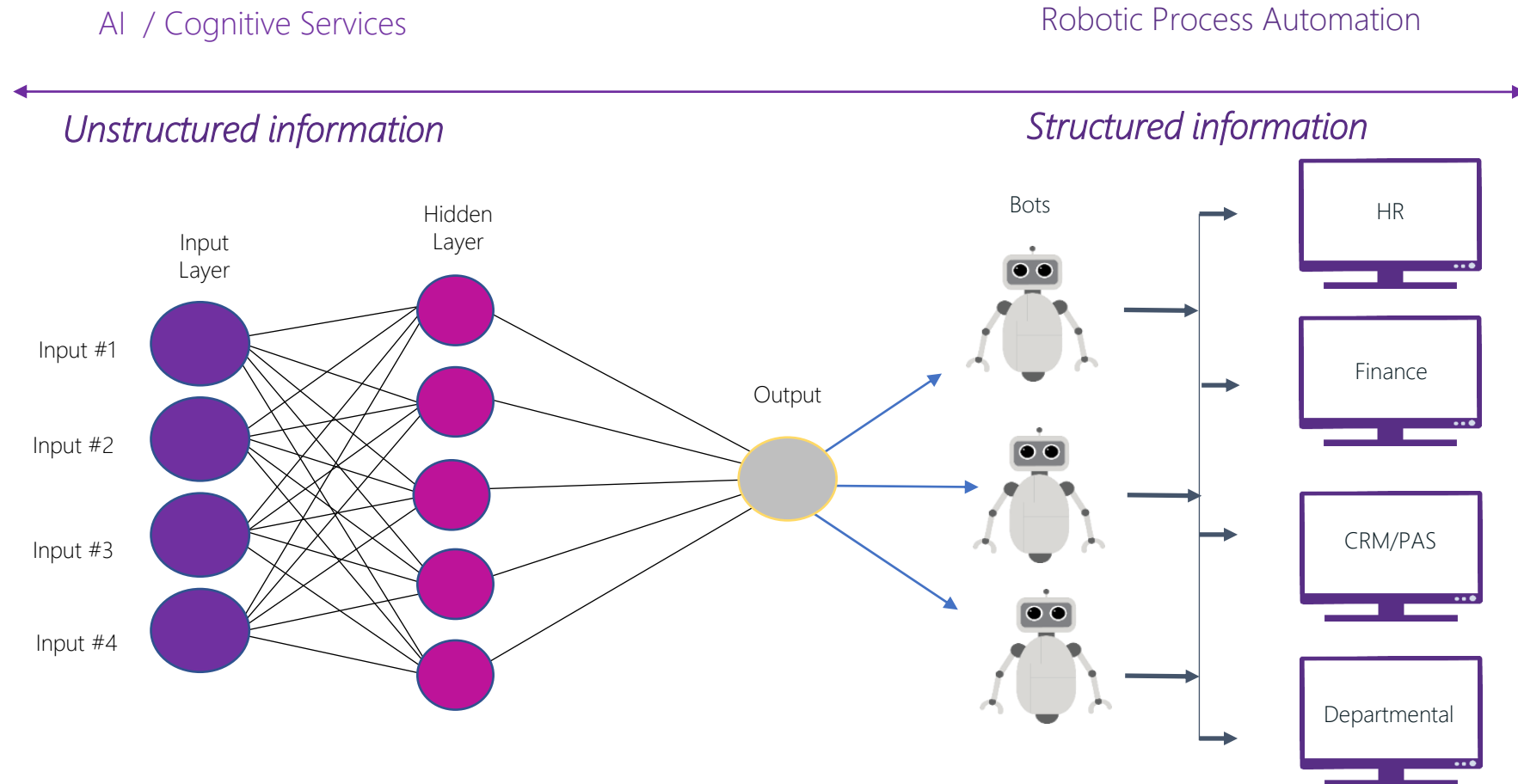
- Import an Open API definition
- Codeless visual experience
- Converts between Webservices and Databases
- Step-by-step Wizard
- Provides gateway to AI and Cognitive services
(will come back to that!)



NDL Connect



What is Intelligent Automation (IA)?



Inspire – Use Cases

Case Study: Moray Council

Revolutionising processes for Housing Repairs operatives with combination of mobile apps and RPA.



- People call in to book repairs
- **Rekeyed to 4 different systems**
 - iWorld Housing (Register)
 - Optitime (Scheduler)
 - Lagan (CRM)
 - Servitor (Materials)
- Pushed out as paper-based job sheet for morning collection
- Paper notes collected on the job
- Rekeyed into the back office through all 4 systems

- **Combination of Mobile Apps and RPA**
- Call handler enters data once into Lagan (CRM) and RPA updates the rest
- Information pushed to Mobile App- **increased functionality & flexibility**
- Job information recorded on the app
- Submit information at the end of day
- RPA **integrates with all 4 systems**

The Results



Increased **data quality**



Saved money



Job **Satisfaction**



Saved time (rekeying and travel)



7 staff members re-assigned to other business areas

Case Study: South Lanarkshire

*Revolutionising processes at corporate scale
with RPA*

- Huge traffic overwhelming contact centre **40,000 transactions annually**
- Many of these requests needed actioning, many of these manual time intensive processes requiring **re-keying** across **various systems**
- Focus particularly targeted at reporting (Systems in property management & waste)
- Desire to **increase** service efficiency
- Channel shift providing modern avenues of engagement **shifting customers away** from telephone

- Procuring RRA and taking a **corporate** lens on processes
- RPA implemented and used **in combination** with Jadu forms (Interchangeable & complimentary)
- Replicable processes repurposed aiding speed of go to live

The Results



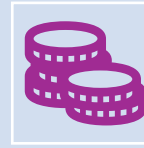
Improved resident experience



1282 days of work saved in the housing department saved alone



Reduced data risks



ROI on licence costs with one process. - Food waste bag replacement



Without the need to manually process high volumes of requests the council has made **significant savings**

Large Scale Document Migrations



Liverpool
City Council



Cheshire West
and Chester



**BOROUGH OF
BROXBOURNE**



CYNGOR BWRDEISTREF SIROL
COUNTY BOROUGH COUNCIL



GOSPORT
BOROUGH COUNCIL

wyre
council



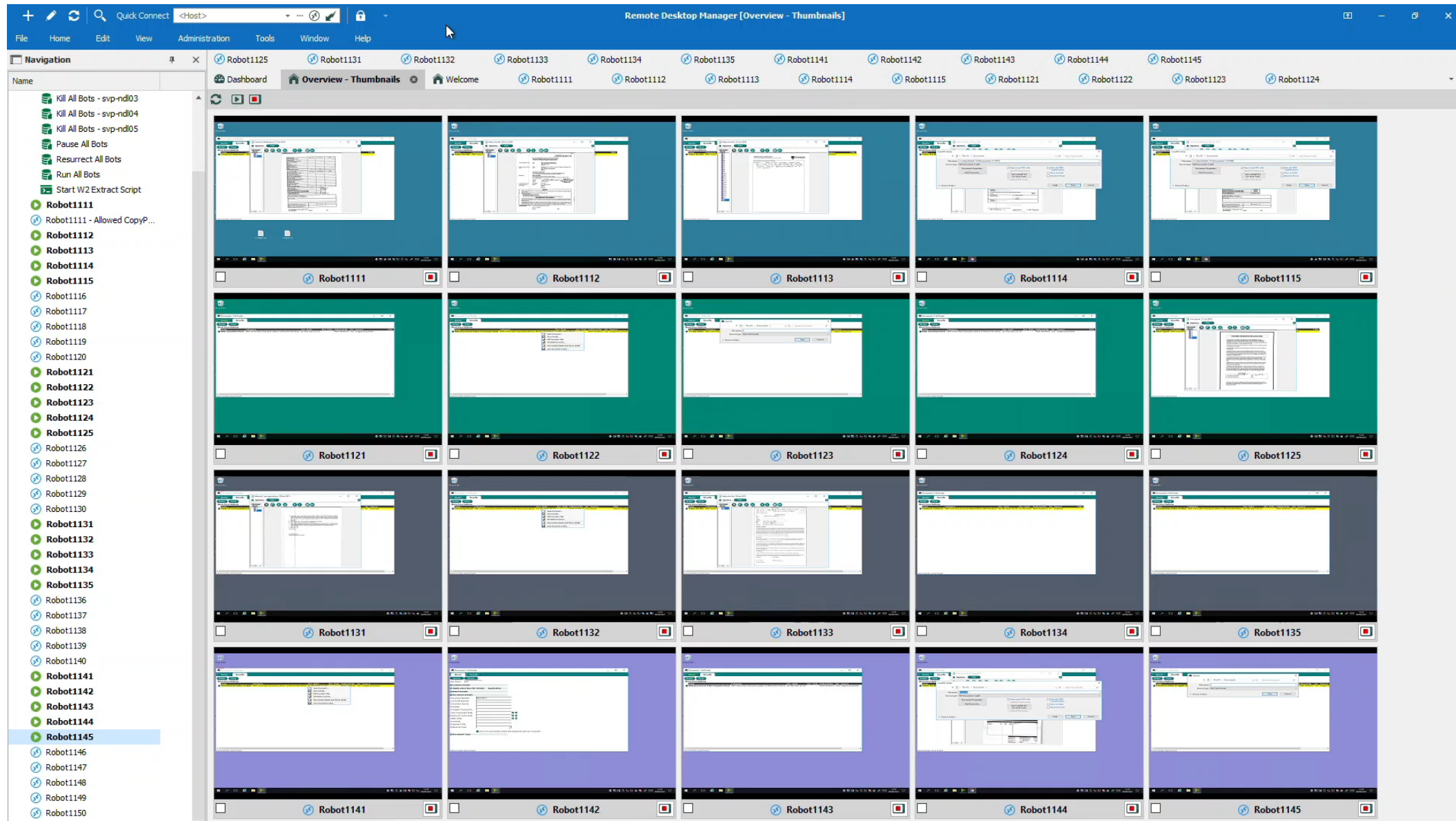
Shropshire
Council



Portsmouth
CITY COUNCIL



RPA Bots in action



The challenge

The organisation is required to manage the Active Directory profiles on behalf of their 5 Local Authority partner organisations, which is comprised of changes for starters, movers and leavers (SLaM)

Challenge:

- Huge administrative overhead (emails not sent or missed)
- Funding Microsoft licences which are no longer in use
- Notable security issue – staff may still be able to access systems



The benefits

Once an employee is marked as “left” in the HR system, this triggers an email to a mailbox monitored by Flow which kicks off the automated process.

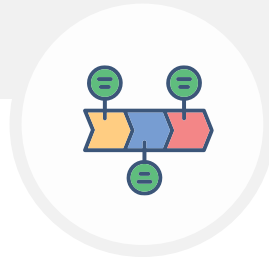
Benefits

- 25 minutes saved per transaction
- Saving money through not paying for unused AD profiles or MS licences
- Improving the new starter onboarding process



Is your organisation ready?

Readiness



How ready are you for transformation?

Readiness

- Do you truly understand your challenges and processes with clear priorities?
- Are key stakeholders clear on the capabilities of the tech?
- What technologies do you need? The right tool for the job!
- Do you have to 'as is' and 'to be' mapped?

— Are you clear about the benefits?

ROI

- Have a strategic pipeline of processes to drive the ROI you need!
- What are your key drivers? How do you define ROI?
 - Financial?
 - Time saving?
 - Reducing risk?
- Have you baselined your processes to measure against this?
- How can you make the investment sustainable?



Prioritising Processes

- Planning your pipeline
- Is it feasible? Have you got a process map? Have you baselined?
- Where can we modularise to accelerate development?

Process	Target per item	Annual/Monthly volume	Total time (hours)	FTE Annually
Process 1	40	6,258	4,172	2.3
Process 2	10	8,925	1,488	0.8
Process 3	2	41,736	1,391	0.8
Process 4	15	2,860	715	0.4
Process 5	20	10,000	3,333	1.2
Total savings anticipated				

Example from NDL Community

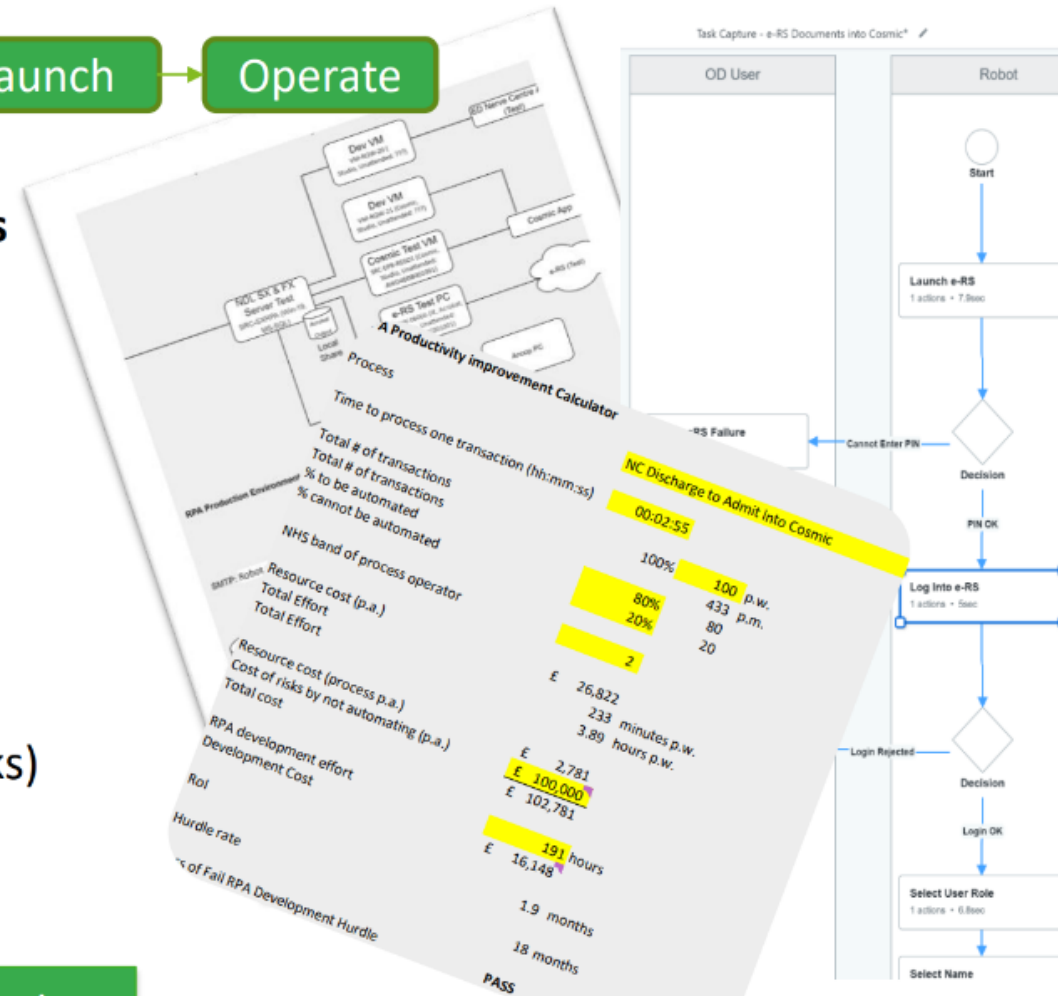
Assess → Capture → Design → Develop → Test → Launch → Operate

1. Propose a process(es) that has some of the following characteristics

- Admin labour intensive of an established process
- Many repeatable transactions
- Uses accessible systems
- May appears on risk register

2. Work with RPA Business Analyst to

- Gate 1: Do a preliminary assessment (30 minutes max)
- Gate 2: Carry out a more detailed Task Capture (1-5 days)
- Gate 3: Automation designed, developed and tested (6-12 weeks)
- Gate 4: UAT and training completed. Analytics (0.5-5 days)
- Gate 5: Launched and reaping the benefits. Support (ongoing)



Example from PAHT

12 active projects:

Status	Phase	Department	ID	Title
In Progress	Operate	CCSS	2626	eRS documents into Cosmic
In Progress	Operate	Emergency Department	2715	Nerve Centre admissions into Cosmic
In Progress	Operate	NDL; PALS	2716	PALS case notes to Datix
Blocked	Operate	Radiology	3034	(21) Radiology Patient Survey
In Progress	Testing	Radiology	2746	(2) Radiology Private patients - eForm
In Progress	Development	CCSS	2664	Chemocare- Day case planning
In Progress	Development	HR	2694	Recruitment - Temporary staffing request form
In Progress	Development	HR	2720	ER Tracker
In Progress	Development	Maternity	2702	Pelvic health form
In Progress	Development	Radiology	2724	(4) Unprocessed into auto report
In Progress	Development	Radiology	2835	(1) Missing & corrupt telephone numbers
In Progress	Development	Radiology	2882	(20) Overdue Xray Orders - Outpatients

81 further opportunities:

Status	Phase	Department	ID	Title
In Progress	Business Analysis	CCSS	2948	Chemocare New Protocol Request Forms
In Progress	Business Analysis	Radiology	2736	(6) Overdue Xray on CRIS
In Progress	Business Analysis	Radiology	2732	(6) Blood results publish in CRIS event comments (orders)
In Progress	Business Analysis	Radiology	2853	(7) TCI on Cosmic - IP & OP
Blocked	Business Analysis	CCSS	3031	2WW Cosmic to Infolinx
Blocked	Business Analysis	CCSS; Pharmacy	2949	Antibiotic Pharmacy Intervention Record - MS form
Blocked	Business Analysis	Finance	2659	Pharmacy invoices (Finance)
Blocked	Business Analysis	HR	2817	(4) Adding applications from Trac to Cohort (Occ Health system)
Blocked	Business Analysis	Radiology	2873	(19) RADCON Turning Orders - Outpatients
Blocked	Business Analysis	Renal	2874	Renal Referral eform to Lister
On Hold	Business Analysis	CCSS	2692	QAO - Robot process adjustment (RAS bookings)
On Hold	Business Analysis	EPMA	2660	Pharmacy invoices (Pharma)
On Hold	Business Analysis	Finance	2643	Daily Cashbook Update
On Hold	Business Analysis	HR	2772	(2) Linking of advert to ESR
On Hold	Business Analysis	HR	2812	(6) Recruitment - Request inter-authority transfers
On Hold	Business Analysis	Maternity	2718	Pregnancy referral form
On Hold	Business Analysis	Radiology	2727	(3) Unexpected findings in Alertive
On Hold	Business Analysis	Radiology	2728	(13) A&E results forward/flag
On Hold	Business Analysis	Radiology	2730	(10) Assign in CRIS update (CRIS > E) allocation
On Hold	Business Analysis	Radiology	2733	(8) No image alert
On Hold	Business Analysis	Radiology	2735	(5) GP chest-lung pathway (CXR result > 2 info > waiting)
On Hold	Business Analysis	Radiology	2844	(11) Patients Observations (Nurse) eform
On Hold	Business Analysis	Radiology	2845	(12) Starts into 3D (Rusht)
On Hold	Business Analysis	Radiology	2846	(14) No GPR into Auto Request for CT
On Hold	Business Analysis	Radiology	2847	(15) Allocation of Specialist Vetting
On Hold	Business Analysis	Ward Managers	2757	Ward managers report
Backlog	Business Analysis	HR	2810	(5) Pension letters

Status	Phase	Department	ID	Title
Backlog	Business Analysis	HR	2811	(1b) Recruitment - Over £100 p/h bookings
Backlog	Business Analysis	HR	2813	(3) Statement of employment
Backlog	Business Analysis	HR	2816	(1a) Recruitment - Adding new starters to ESR
Backlog	Business Analysis	HR	2818	(7) Creating new employee files and downloading from Trac
Backlog	Business Analysis	HR	2860	(8) Sending Trust ID guest link to candidate
Opportunity	Business Analysis	Admin & Clerical	2795	Admin & Clerical Processes
Opportunity	Business Analysis	Bereavement	2796	Bereavement Processes
Opportunity	Business Analysis	Bereavement; CCSS	2800	Triage Clinics Paperwork
Opportunity	Business Analysis	CCSS	2798	e-letters to NC discharge
Opportunity	Business Analysis	CCSS	2799	Referrals outside of e-RS
Opportunity	Business Analysis	CCSS	2801	Tumor emails and referrals on Infolinx
Opportunity	Business Analysis	CCSS	2802	Chemocare - 2 x forms on Fresh ticket
Opportunity	Business Analysis	Clinical Excellence	2803	PACE
Opportunity	Business Analysis	EPMA	2769	Discharge summary / TTA
Opportunity	Business Analysis	Estates & Facilities	2804	Estates & Facilities Processes
Opportunity	Business Analysis	Finance	2805	Control Account reconciliation
Opportunity	Business Analysis	Finance	2806	Payment processing (twice p.w.)
Opportunity	Business Analysis	Finance	2807	Trust Purchasing Card
Opportunity	Business Analysis	Finance	2808	RTA injury cost recovery scheme
Opportunity	Business Analysis	HR	2767	Occupational health form
Opportunity	Business Analysis	ICU	2819	ICU Processes
Opportunity	Business Analysis	IT	2820	Issue logging and testing issues and risks
Opportunity	Business Analysis	IT	2821	Update Allowed directory with entries from Bx8
Opportunity	Business Analysis	IT	3029	AD account activation/deactivation
Opportunity	Business Analysis	Maternity	2822	Complete maternity scan template
Opportunity	Business Analysis	Maternity	2823	Making appointment on Cosmic

Status	Phase	Department	ID	Title
Opportunity	Business Analysis	Maternity	2824	Outcome of appointment
Opportunity	Business Analysis	Maternity	2825	Unprocessed from Maternity
Opportunity	Business Analysis	Medicine	2827	Medicine Processes
Opportunity	Business Analysis	Ophthalmology	2952	Flag Transport patient
Opportunity	Business Analysis	Pharmacy	2829	Multi dataset box tracking form
Opportunity	Business Analysis	RTT	2830	Referral to Treat Process
Opportunity	Business Analysis	Surgery	2831	Gastroenterology Colorectal & Endoscopy
Not Progressed / Retired		CCSS	2665	Chemocare - New referral
Not Progressed / Retired		CCSS	2686	2WW - Fast track into Infolinx
Not Progressed / Retired		CCSS	2689	2WW - fast track registration from ASI list
Not Progressed / Retired		CCSS	2950	2WW Fasttrack in to Infolinx
Not Progressed / Retired		CCSS	2951	2WW Fasttrack Registration from ASI List
Not Progressed / Retired		Finance	2791	NHS-E / NHS-I returns
Not Progressed / Retired		Finance	2792	RTA reconciliation
Not Progressed / Retired		HR	2693	Recruitment - Trainee rotations
Not Progressed / Retired		HR	2793	Recruitment - Sending offer letters
Not Progressed / Retired		HR	2794	Recruitment - Health Roster
Not Progressed / Retired		HR	2809	Learning & Development
Not Progressed / Retired		HR	2814	Update training records
Not Progressed / Retired		HR	2815	Payroll
Not Progressed / Retired		IT	2691	Clinical coding for outpatients
Not Progressed / Retired		IT	2789	Locum Packs - HCAs and Nurses
Not Progressed / Retired		IT	2790	Locum Packs - Consultants and Doctors
Not Progressed / Retired		Maternity	2832	Obstetrics referral form
Not Progressed / Retired		Radiology	2723	(16) Outpatient event auto attend (PETS Pava)
Not Progressed / Retired		Radiology	2848	(17) Auto chase Outstanding
Not Progressed / Retired		Radiology	2849	(18) CRIS auto add event (NUL-MED)

— Keep people at the center of the journey

- Education, Education, Education!
- Communicate appropriate messages to appropriate stakeholders – at the right time!
- Set the right expectations
- Balance excitement with delivery!



NDL | Evolve



NDL | Flow



NDL | Connect



NDL | Automate



NDL | Digitise





NDL | Evolve

Digital Transformation Platform



Next steps

- Beat the bot workshop
- ROI workshops
- Product demos
- Inspiration sessions- Learn and replicate other council success

Let us know!

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