



Welcome

RPA Best Practice Navigating the Path to Success in Local Government

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Share Learnings

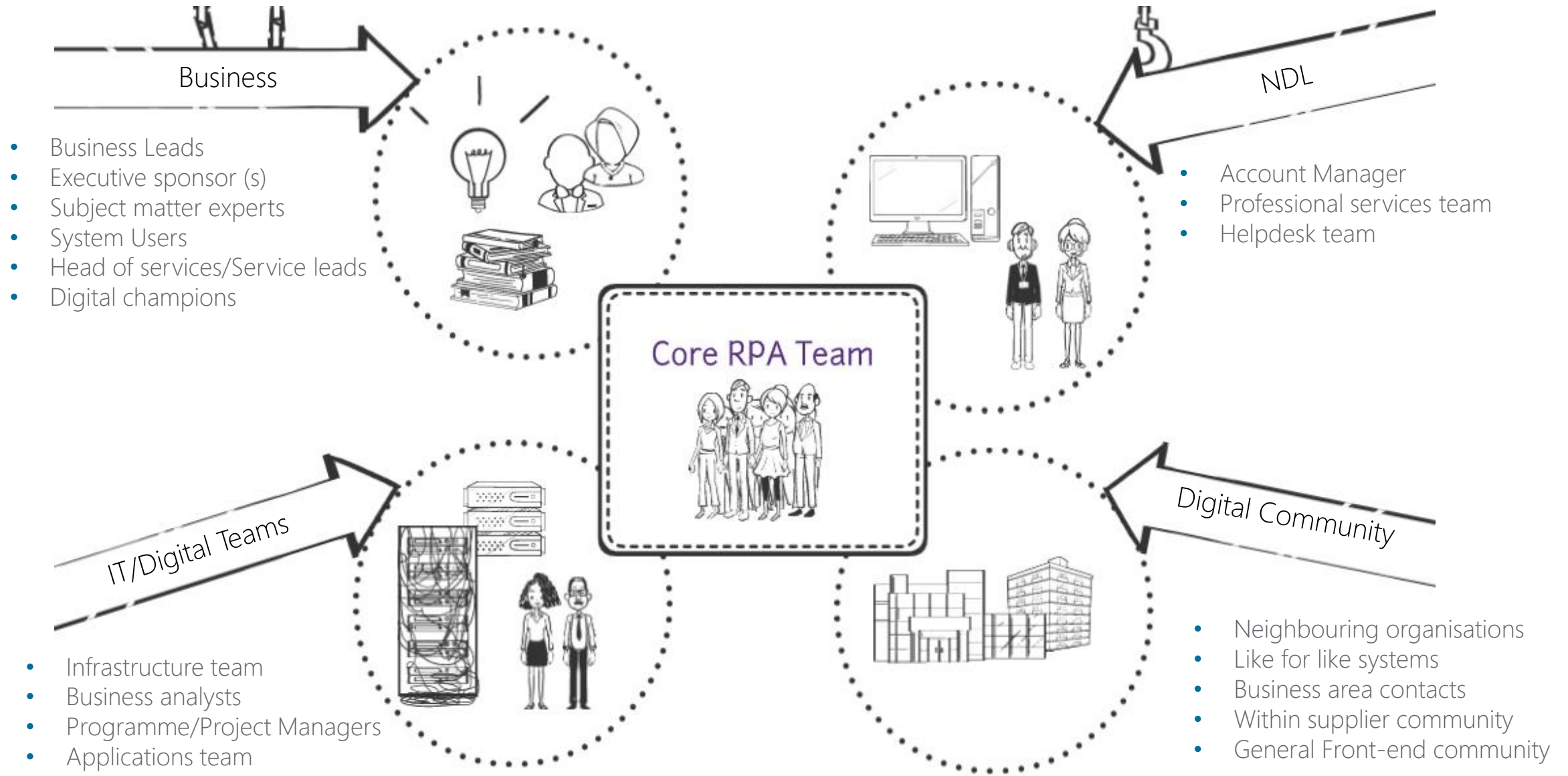
- Harnessing a culture of collaboration
- Benefits, power, and scalability of RPA
- Tips and Tricks for kick starting RPA projects

Inspire

- Norwich City Council
- Warwickshire County Council
- Swindon Borough Council
- Moray Council

Excite

- Can you beat the bot?
- Create a fun, interactive and collaborative session!

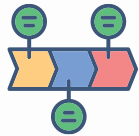


The Path to Success

Discovery



Readiness



Engage



Prove



Accelerate

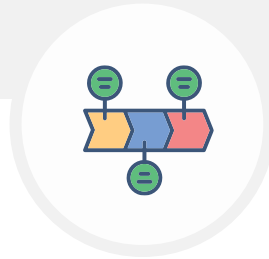


BAU



The Path to Success

Readiness

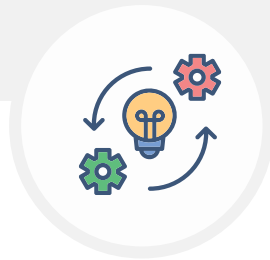


The Path to Success

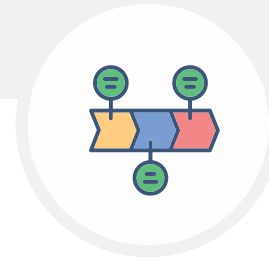
Discovery



Education



Readiness

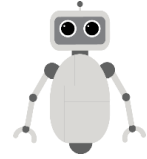


Share Learnings

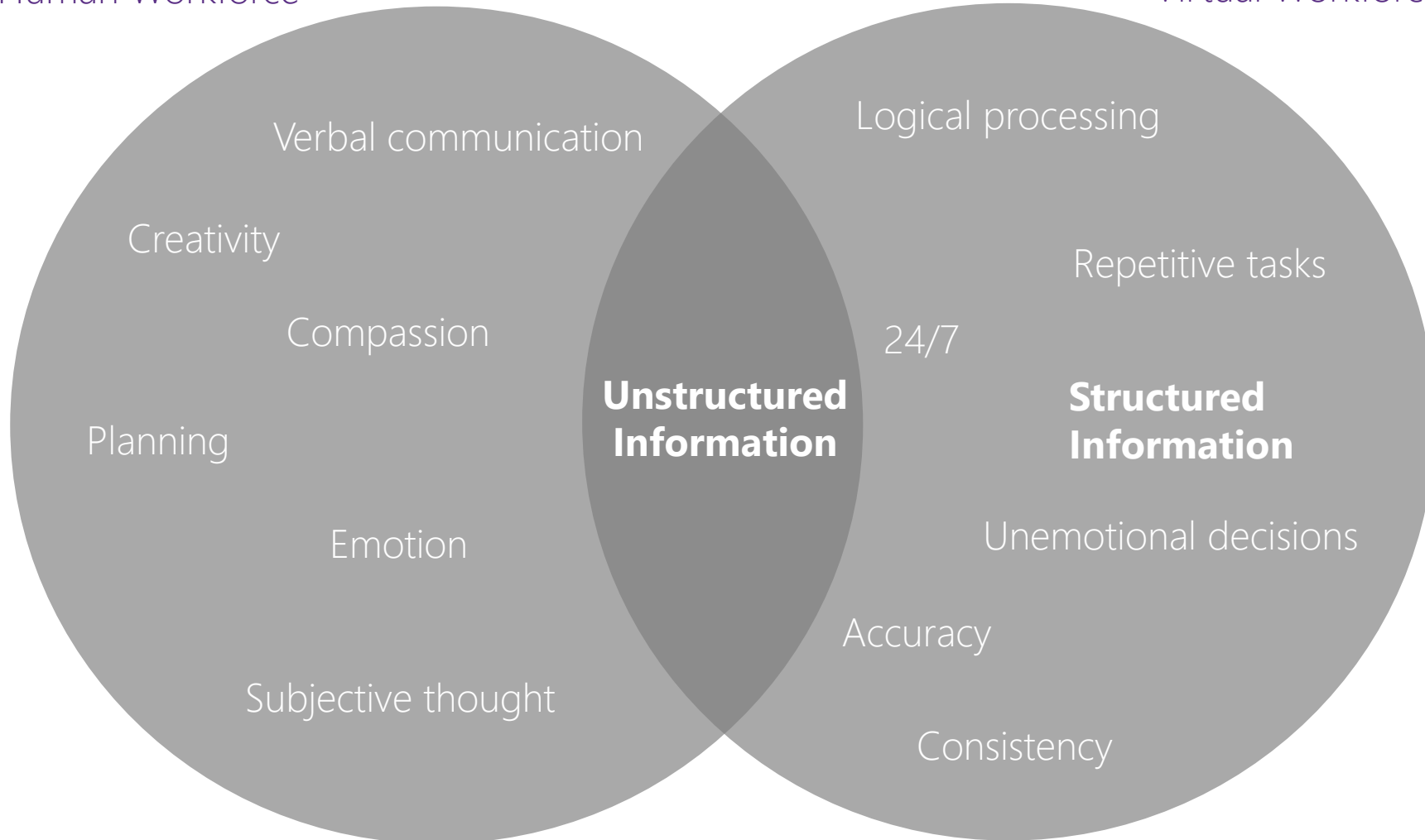
Key roles within an organisation



Human Workforce



Virtual Workforce



What 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



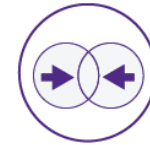
Migration



Synchronisation



Extraction

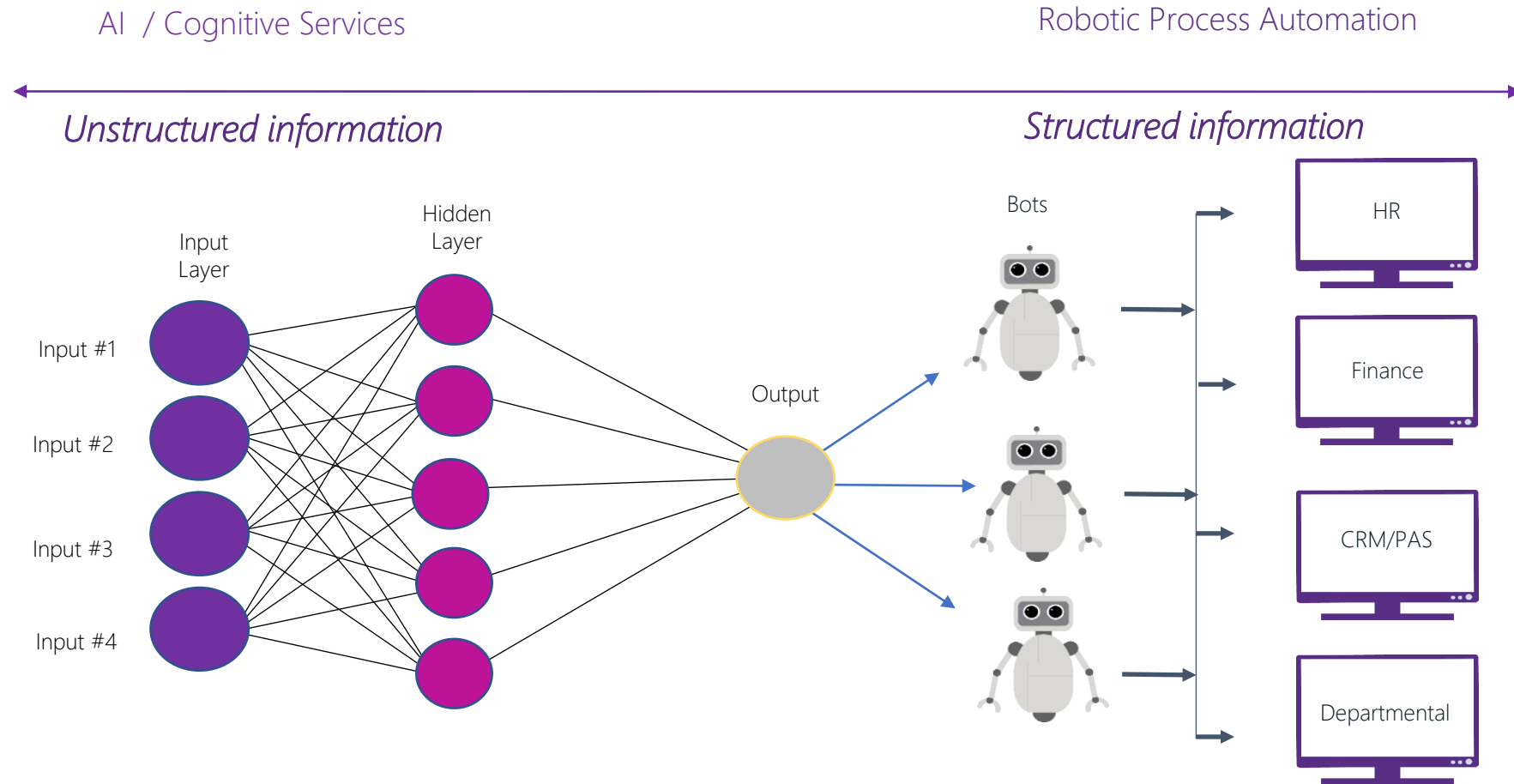


Data Integration



Intelligent Automation

What is Intelligent Automation (IA)?



Inspire – Use Cases



End-to-End Housing Repairs: Putting Residents First

- Response times below national average
- Improved efficiency
- Financial savings
- Environmental benefits



End-to End Home Visits: Supporting Independent Living

- Faster accessibility fittings for residents with additional needs seeking independence
- Time savings of up to 50% for both Occupational Therapists and residents
 - Eradicate data rekeying
 - Improved accuracy and data quality





Free School Meals Automation

- Application turnaround time for parents and carers reduced by 66%
 - 98% efficiency when processing data using RPA
- Effective management of a consistently high volume of applications
 - Increased safeguarding of sensitive information
 - Reduction in data error

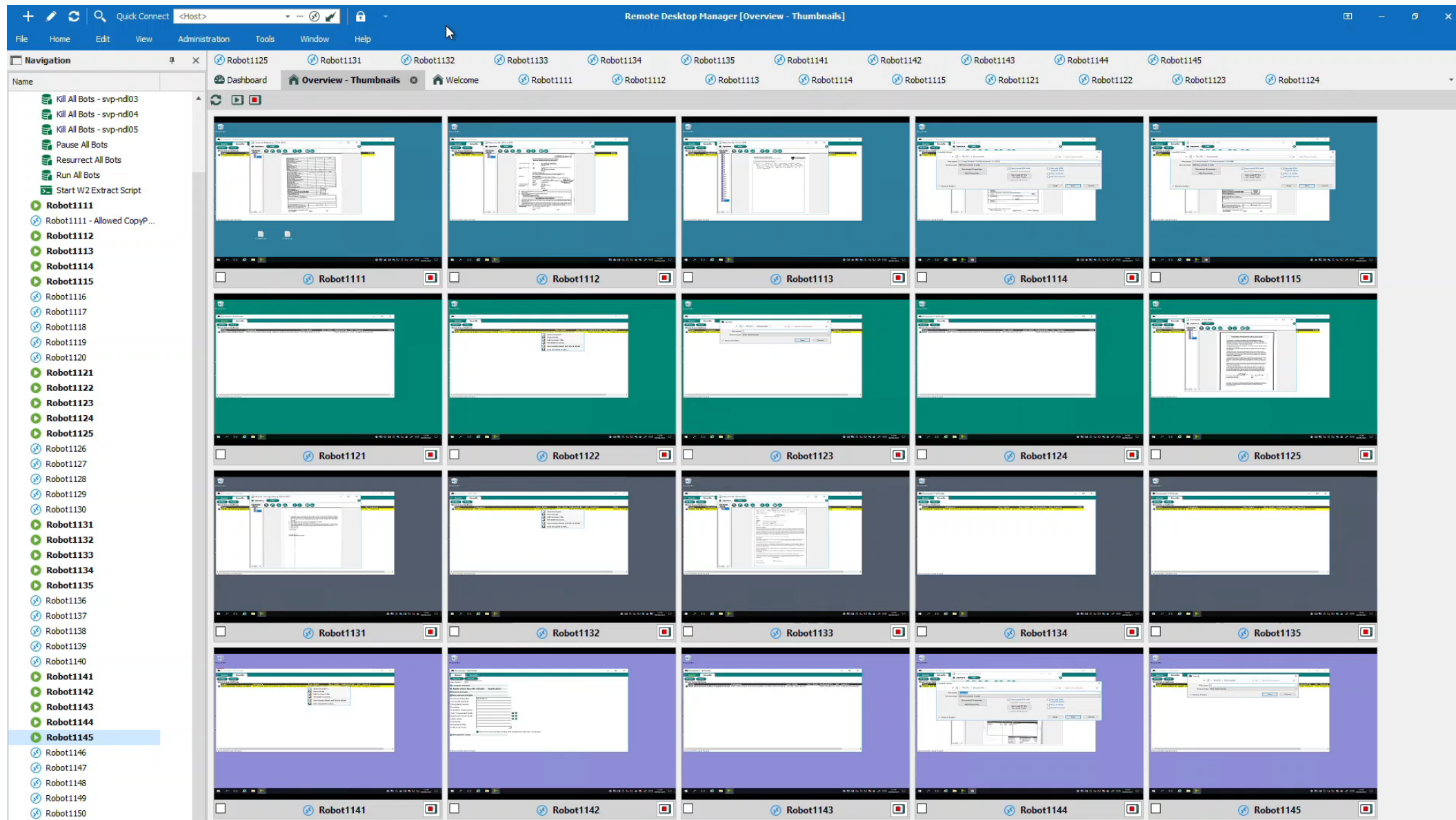
Providing “Breathing Space” Debt Relief



NORWICH
City Council

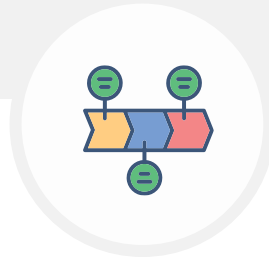
- Fast deployment of Breathing Space scheme
- Significant time savings when processing resident enquiries
- Reduced negative financial impacts on residents
- Improved accuracy and data quality
- Unified inter-departmental data and information

RPA Bots in action



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

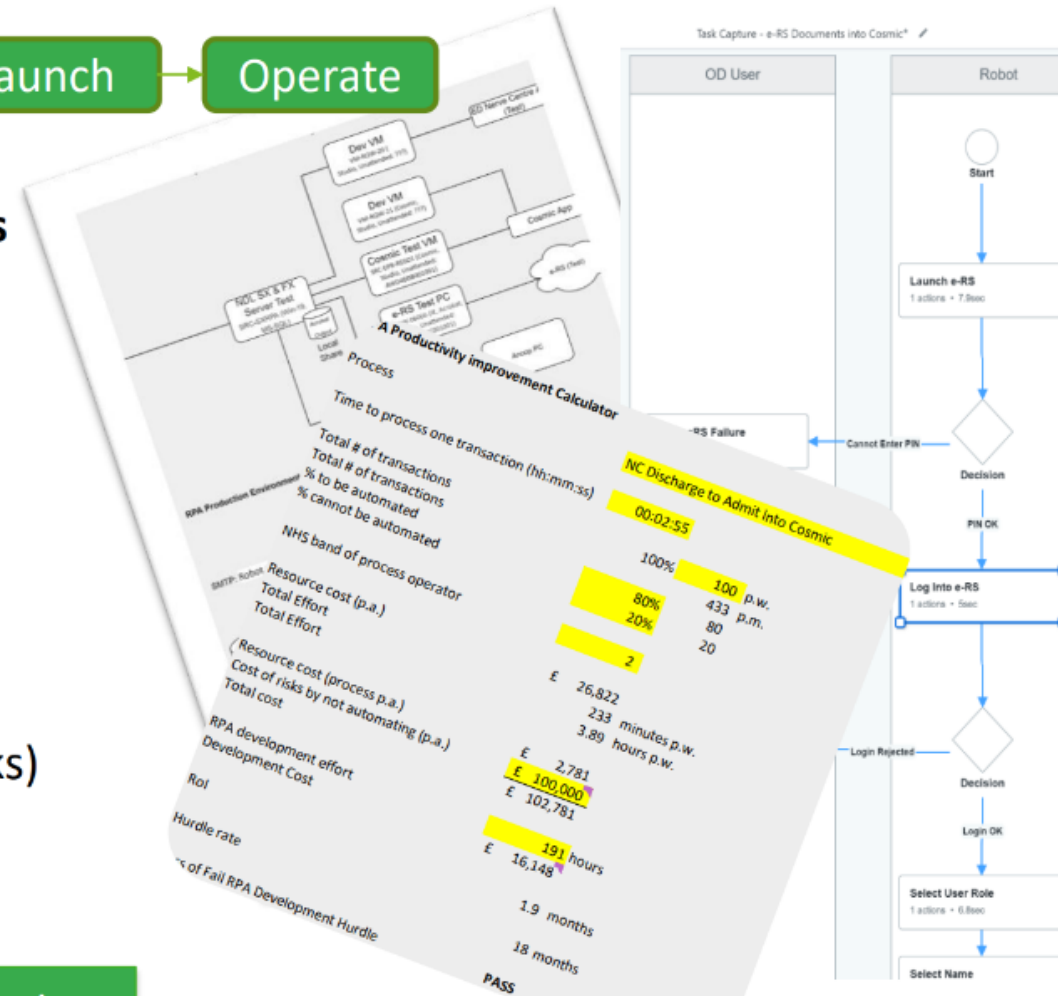
Assess → Capture → Design → Develop → Test → Launch → Operate

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 DSD (Rusht)
On Hold	Business Analysis	Radiology	2846	(14) No GPRP 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	Central 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 dose set 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



Excite – Beat the bot - Workshop

Real life scenario

- **You** are part of the housing and community team. **And this is the pressure you're under**
- Shrinking team (staff absence, annual leave, school holidays)
- **4,000 applications** in the backlog for homelessness
- Growing Union & Political **pressure**
- Keeping the lights on for day-to-day services, **just about.**
- **Your job is to rekey data** onto the application to get vulnerable members of the public appropriate access to support and services

Beat the Bot



Rekey the information below into the e-Form provided

Full Name: John Smith

Organisation name: NDL Software Ltd

Course title: SX Developer Foundation

Course delivered by: Declan Malone

Email: johnsmith@gmail.com

Work contact number: 0207 434 2432

Start date of course: 24/10/2023

Set up to your requirements: Very good

Adequate for the training: Very good

Skills of presenter: Very good

Quality of presentation: Very good

Value of information: Very good

Did the training session meet your objectives: Yes

Did you find the training of value to you and your organisation: Yes

Would you recommend the training course to others?: Yes

Who would you recommend it to?: Anyone

Further comments/recommendations: Great course





Some ideas...
How much
time can we
save?!

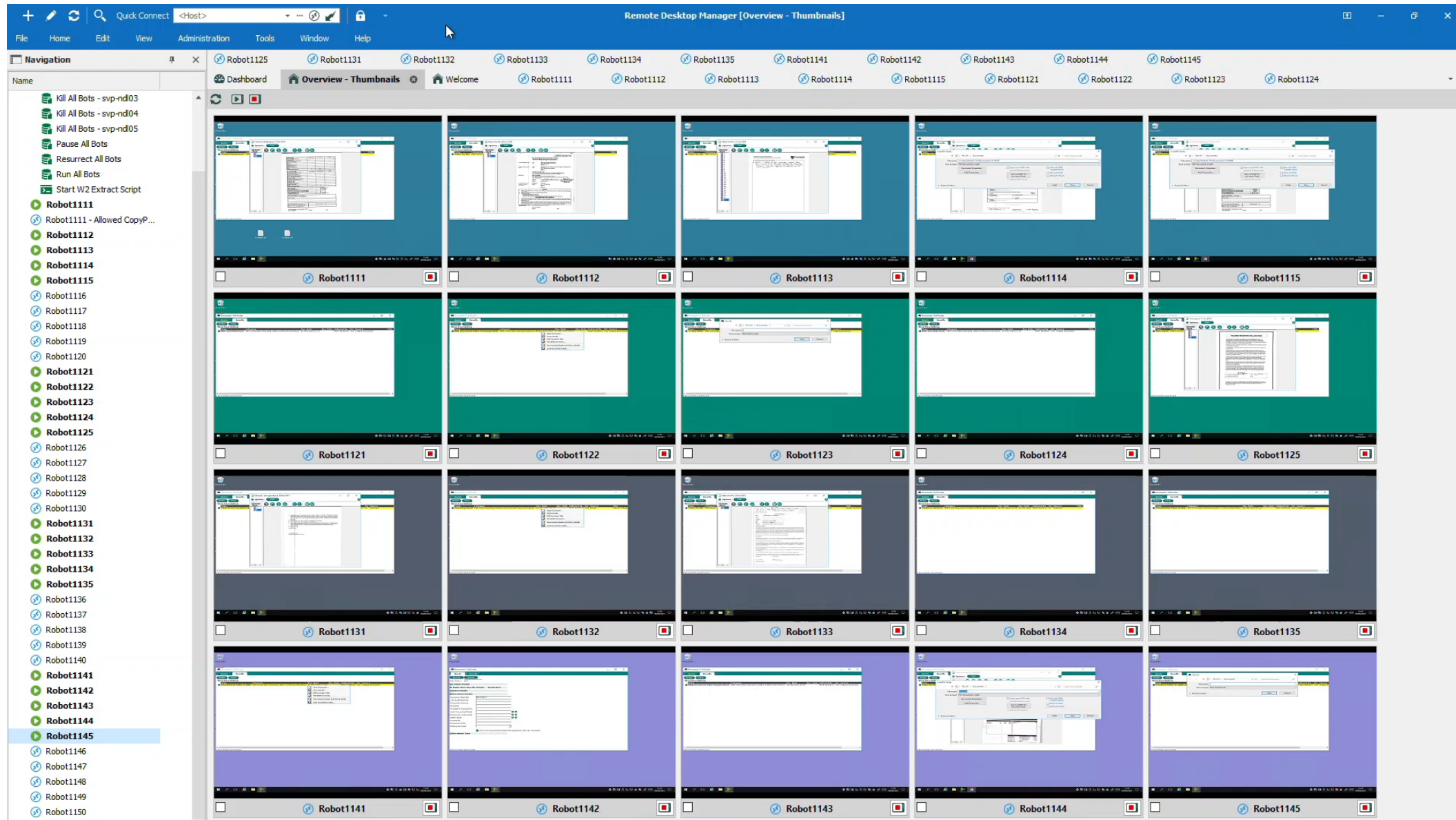
- Benefit claims
- Single person discounts
- eForm integration
- Revs and Bens Enquires
- HR starters, leavers, movers
- Free school Meals
- Migration from system to system
- National Living wage increase
- Tell us once
- Data cleansing
- Attaching PDFs, case notes to CRM
- Council tax DD set up
- Housing applications
- Responsive repairs
- Benefit claims
- Grants
- National Reporting
- Invoicing
- Bulk waste collection
- Missed bins automation
- Abandoned vehicle
- Food services (inspections)
- Pest control
- Parking permits
- Blue badge
- Fly tipping reports
- Synchronising systems

RPA Bots in action

What a bot can't

do:

- Think for itself
- Learn
- Handle unique scenarios
- Problem solve
- Fix bad processes
- Speed up systems
- No interpersonal skills



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



Benefits of RPA



SCALABLE



ACCURACY



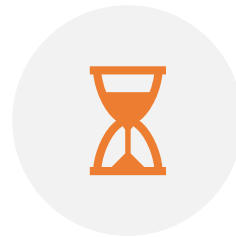
SPEED



PROVEN



FLEXIBLE



QUICK TO
DEVELOP



TACTICAL AND
STRATEGIC TOOL



SPRINGBOARD
ENABLER



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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