



# 7 BACKGROUND CHECKS

What you need to know  
before hiring a robot

Robotic process automation is increasingly being linked to operational efficiency and productivity improvement. It is probably a key priority area among the many strategic initiatives of your company.

Corporations across industries are evaluating and implementing business process automation to improve accuracy, eliminate redundancy and reduce operational costs. So, how do you ensure that you have the right roadmap for automation in place – one that delivers a robust return on investment and yet safeguards your long term business interests?

The answer lies in what some of the pioneers in automation are doing by hiring the right robot for the right job. In this article, we will uncover 7 secrets that will help you evaluate and identify the appropriate robotic automation solution for your enterprise.

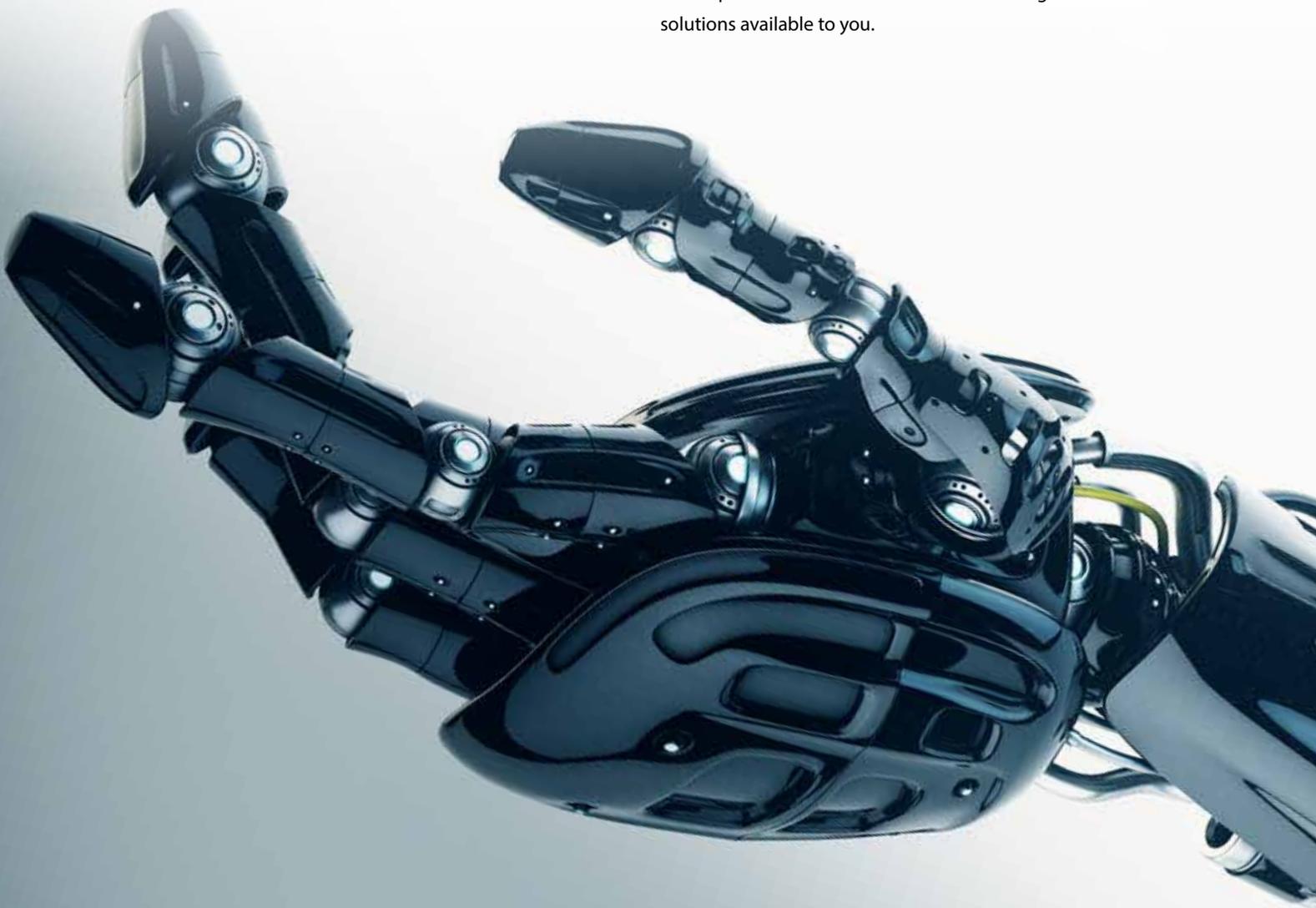
## Check 1: Defining the problem statement

**Q: Do I need a shovel or a snow blower?** A: Neither. How many inches of snow do I have?

Most process owners are overwhelmed with so much information that they often find themselves back at the drawing board merely to answer one simple yet critical question – “What is it that I am solving?” It helps to start with simple questions that are relevant and important, such as: “What is it that I am automating?” and “Is it worth my time and investment?”

A good business case is one that can define the problem statement, measure the magnitude of the automation opportunity, assess the complexity of the processes, and create options to improve the situation along with corresponding returns on investment for each option. Different solution vendors in the market are scattered across the automation spectrum according to their characteristics of process and data/information.

Processes that are evaluated for automation may range from repetitive, non-variant and mundane tasks to unstructured ones with complex decision trees and cognitive computing. Defining a clear problem statement is critical to creating a short-list of solutions available to you.



## Check 2: Identifying the right candidates

Hiring robots comes with a price. Be sure that they are utilized appropriately.

Corporations that successfully adopt automation frameworks also excel at evaluating the complexity and volume of the business process. Typical manual tasks include comparing information in documents, copying data into spreadsheets, examining and correcting data across IT systems, conducting matches, compiling lists of corrections, etc.

Today, leading automation solution providers are able to solve business problems across several key functions such as finance and accounting (F&A), human resources (HR), sales and fulfillment, procurement, back office operations, support, etc. Their observations indicate that successful robotic process automation is primarily driven by complexity of processes and volume of transactions. Thus, choosing the right processes for evaluation is a key step in your automation journey.

## Check 3: Upfront versus maintenance costs

All eggs in one basket is passe. Now choose which baskets to put your eggs in?

Different solution providers offer a gamut of commercial models for their robots. The better models are those that provide flexible pricing plans for various upfront fixed and maintenance costs. There are industry case studies where assisted automation capabilities have been leveraged to scale a support desk with over 25,000 personnel as well as an IT help desk with over 40 people.

Thus, irrespective of whether licenses are priced based on the outcomes or the number of robots or processes, what really tips the cost-benefit scales is maintenance. This should include long-term cost for support, configuration, maintenance, additional customization, re-designing, etc. Be sure to clarify pricing options and the associated maintenance costs with your solution provider to avoid unpleasant surprises in the future.

## Check 4: Configuration over customization

Robots are not – and should not be – born out of cookie-cutters.

The definition of a robot may vary across vendors. Sometimes, a robot can simply be a script running in the background. Conversely, robots can also be a complex part of an automation framework with the option to create your own robots. Thus, it is only fair that your automation roadmap should include the demands of the evolving IT roadmap of your organization.

Automation frameworks that leverage technologies such as component object model (COM) are more adaptive to change.

These approaches are fairly robust, secure and supportive.

They do not demand a massive redesign effort in case there are changes within the user interfaces of IT applications involved in the automation process. Solutions leaning towards codeless automation approaches offer design studios. These enable business users to easily configure and redesign automation processes.

## Check 5: IT governance and security

A: I hired a robot for doing a two-person repetitive and boring task.

B: Great! What happened to those two people?

A: Well, they monitor the robot for compliance.

Often, the conversation and excitement around robot-driven automation comes to a standstill due to pressing IT concerns and governance. Many script-driven solutions are unable to meet IT security and compliance needs. Reliable solutions are those that involve robust and secure approaches such as screen emulation techniques instead of risky screen-scraping technologies, COM-based design, admin console-driven robot monitoring, self-healing capabilities, and an option to deploy the robots on desktop machines of process executives. Such approaches ensure complete security and easy re-configuration as well as desktop-driven intervention and resolution during exceptions.

Ensure that your provider offers recent referrals and industry certifications while adhering to your own organization's IT security and compliance needs. A credible automation solution provider can refer to adherence standards of their implementations and meet stringent demands across industries such as finance, telecom, health insurance, etc.



## Check 6: Align your IT vision with the automation roadmap

Robots have different genetic make-up and, hence, it is imperative to choose the right one to meet your business challenges.

Robots on the cloud can be great. However, you may want to evaluate the larger and immediate automation opportunities that are available on-premises. Further, certain robot frameworks may not align well with the service oriented architecture (SOA) based IT roadmap of your organization.

In any case, it is wise to choose a solution that can be flexibly deployed and utilized based on your need. For instance, you can re-configure your robots during a migration or de-commission them when your SOA framework takes-off. Thus, contracts and deployment models are key considerations to ensure that your automation plan aligns well with your long-term IT strategy.

## Check 7: Ease of evaluation

Good solution providers offer the option to try-before-you-buy for a marginal fee. This is possible because of their flexible deployment models.

Leading automation solution providers offer this flexibility when it comes to trial and evaluation, thereby delivering non-disruptive and quicker proofs-of-concept in as less as 2-3 weeks.

While licensing, implementation and maintenance costs are assured within any automation offering, it is also important to investigate the architecture of deployment and the underlying technology. This will significantly impact the hardware and software costs associated with the implementation. Leaders in the automation industry are able to design novel solutions based on different implementation models such as client-server, on-premises, cloud-hosted, desktop-based approach, etc.

Hiring the right robot for your job description can be just as demanding and detail-intensive as hiring the right people for your organization. It is a balancing act that can ensure that short-term tactical moves pay off against your long-term strategy. The time you invest in identifying the problem statement and creating a list of solutions will pave the way for your robots to become an integrated and integral component of your workforce.

The author **Nandakumar**, is an avid automation enthusiast leading EdgeVerve's automation efforts for manufacturing and retail clients in North America.

---

### About EdgeVerve

EdgeVerve Systems Limited, a wholly owned subsidiary of Infosys Limited, defines, develops and licenses innovative software products and cloud hosted business platforms. We focus on driving revenue growth, cost effectiveness and profitability for global corporations and their business ecosystems across across the world. Visit [www.edgeverve.com](http://www.edgeverve.com) to know more about our innovations in banking, financials services, insurance, retail, CPG, life sciences, manufacturing and telecom.



---

For more information, write to [edgeverve@edgeverve.com](mailto:edgeverve@edgeverve.com)

[www.edgeverve.com](http://www.edgeverve.com)