

Mech-A-Change – Supporting documentation for RPA journey

A case study on Robotics Process Automation to develop customised feasibility assessment framework



Background

The client, a leading Asian investment bank, pioneered the Robotics Process Automation (RPA) initiative across its operations before this technology was adopted across the organisation globally. PwC India had been appointed as implementation partner to identify automation opportunities, setup governance and automate processes.



Engagement overview

PwC was asked to do an automation feasibility assessment of all the processes being performed at the client's India centre. This entailed covering teams such as Finance, IT, Operations, Risk, Compliance, Global Markets, Legal and other Admin teams. The ask was also to ascertain the automation quotient of the process, recommend suitable tools and create a book of work that would eventually be automated.

We were also entrusted with the responsibility to set up the Governance Model for the client to ensure compliance for internal operational risk and regulatory requirements, set up the change management model, disaster recovery and business continuity plan for the digital workforce, define roles and responsibilities for various teams involved in day-to-day running and maintenance of the software BOTS. Our role also included BOT design, development and help bring the software BOTS into production for the client.

In summary, PwC was responsible for :

- Automation feasibility assessment of activities performed by 3500 full-time equivalents (FTEs)
- RPA vendor selection
- Setting up of RPA governance framework for the investment bank
- BOT design, development and deployment

Our solution

- We developed customised feasibility assessment framework that was shared with the business to fast track the automation assessment.
- We established the governance framework that catered to the RPA implementation guidelines and aspects of risk, compliance, business continuity, disaster recovery, defect management and change management.
- We created client specific solution design templates and handover documents to document the automation requirements.
- We set a scalable technology infrastructure and virtual desktop infrastructure (VDIs) for DEV, user acceptance testing (UAT) and production were put in place instead of desktop.
- We created a BOT development framework to ensure a standard approach to development and testing.

Entire scope of work

Standardised yet configurable frameworks

Agile approach

Globally replicable governance model

Effective collaboration

Reporting and governance

Continuous capacity creation for business

Client benefits

PwC enabled the client with relevant RPA Infrastructure, RPA Operating Guidelines, product knowledge of an RPA vendor, RPA SDLC templates and supporting documentation to support the RPA journey

Client now has better visibility on automation opportunities and process standardisation opportunities within their business processes

Regular dashboards and scrum meetings are held to ensure that management is able to take relevant and quick decisions

An ongoing model of BOT implementation has been developed to bring in additional capacity for various business functions

Fulfilling the PwC Purpose of helping clients in their transformation journey – strategy through execution

Additional benefit for the client is that their India office will be positioned as the RPA Centre of Excellence globally.

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