

Unifying Human and Digital Workforces:

Autonomous Automation is Key to a Better Customer Experience



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Robotic Process Automation Software

Delivering the **world's most successful digital workforce.**

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EXECUTIVE SUMMARY

Consumer digital devices and new technologies such as AI and Voice Recognition are driving expectations for enhanced customer experience with enterprise applications. Customers are now expecting more engagement via self-service applications across omnichannel resources, and they want the option for immediate human interaction if there are exceptions during those engagements.

The integration of TrustPortal with Blue Prism meets these customer experience expectations by combining the power of Robotic Process Automation (RPA) with dynamic human-to-robot and robot-to-human interactions. Blue Prism, is the only company unifying the human and digital workforce, so Enterprises can have the best of both worlds: A choice between autonomous or assisted automation for a better customer experience. Users can now have a 'conversation' with a robot in real-time to resolve complex issues – and avoid duplicate data requests. Enterprises can now expand processes that can be automated across all interaction channels and multi-platform processes.



I. Changing Customer Expectations

Customers are demanding real-time engagement and convenience they've come to expect from a technologically-driven world, but the current customer experience is not meeting expectations.

New services that take advantage of technology for smart phones and tablets have come from some of the most valuable companies on the stock market because their customers place high value on these services. Think real-time status updates, instant messaging, ordering anything online, sharing payments, rideshares, buying music or movies, booking accommodations, reserving flights, and home delivery.

Customer expectations have also transformed over the last few years, which is not only driving economic changes, but also how customers expect to interact with the companies they deal with every day.

Customers are also demanding service improvements from such key industries as banking and insurance, as well as more accessible online services from government agencies – and that includes human support at the touch of a button.

II. Delivering a Better Customer Experience is Critical

The bottom line is that customers are demanding improvements in real-time, increased engagement, and more options for communication – bringing the concept of “business self-service” to the forefront.

A recent *Harvard Business Review* Analytics Services study showed that most (73%) of business leaders agree that delivering a reliable and relevant customer experience is “critical” to managing business performance in today's market. And nearly all (93%) expect customers to become even more demanding over the next two years.

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Yet only 15% rated their company's ability to deliver superior customer experiences as “very effective,” while 32% said their efforts are “not very effective.” Another 53% rated their work as “somewhat effective.”

However, increased pressure to deliver personalized, real-time experiences is already spurring transformation in a variety of industries — and automation is emerging as the solution of choice for enterprises worldwide.

III. The Power of Digital Transformation & Autonomous Automation to Drive the Customer Experience

In addition to enterprise digital transformation, automation is also driving the kind of personalized, real-time services that customers are demanding. Companies are looking for leading technologies that are easy to deploy and maintain – not only to improve customer experience, but also to spur changes in the business.

Voice recognition tools like Alexa and Siri are driving wide-ranging usage for a multitude of services. Chatbots are enabling connection to human workers and are beginning to be connected to specific system processes. Mobile apps and web portals are improving for every type of organization. Extending end-to-end use cases accelerate user adoption and improve customer engagement.

The right kind of automation is key – one that combines both the power of RPA with a dynamic, digital front-end that brings the option for human interaction into the equation.

Both enterprises and governments have invested heavily in new platform technologies and business process improvements to deliver some of the changes customers want. However, the organizations driving this are often beaten by nimble and agile start-ups that have the customer insight, funds, and focus to deliver new ways of working.

Businesses and governments are enabling self-service automation and human engagement in a real-time and cost-effective manner. And, they are using customer experience as the strategic indicator to ensure customers are not forced down the wrong engagement channel.

IV. Human Interaction: an Integral Part of the Customer Experience

The reality is that customers want human interaction for critical business process interactions or failure points – both of which are an integral part of the customer experience. Consider that:

- Customers expect 100% self-service and demand human engagement when other channels or services fail.
- Voice recognition is only just starting to touch business use cases and new developer kits will start driving voice enabled services.
- Chatbots that offer an instant message engagement is often a communications channel of choice for millennials.

Organizations know they need to adapt to deliver self-service capabilities. Even more critical is that most digital transformation programs are slow and don't deliver what customers want. This is driving the RPA, AI and digital automation market to new heights, with various industries [increasingly adopting process automation solutions](#).

The offer of self-service and cost reduction are too compelling for companies to ignore and, now that hundreds of processes can be automated, both business and IT are recognizing the need for a new agile approach. But most of these approaches are centered around desktop automation, or small implementations of non-core processes.

With labor productivity improvements expected to account for more than 55% of global GDP gains from AI by 2030¹, businesses need to be prepared to deliver change at this scale. To do that, and to also satisfy the customer experience, the right kind of automation is key – one that combines both the power of RPA with a dynamic, digital front-end that brings the option for human interaction into the equation.



¹ Source: PWC - The macroeconomic impact of artificial intelligence – FEB 2018

V. Blue Prism & Trustportal: Engineering a Better Customer Experience

Businesses need to engineer the human both in and out of the automation process for customers to get a better overall experience. In many RPA deployments, automation providers are focused on back office automation – often in batch or trigger mode and working away at boring task-based processes in a methodical manner to help save time.

In *Attended Automation* scenarios, the employee and the robot are working on the same machine & sharing the exact same ID, while in *Autonomous Automation* (AKA “lights out”) situations, the robots are pre-programmed to do work without the assistance of a live customer service representative.

However, by understanding the **complete user experience**, we can reinvent all the digital and human contact points. And that’s where **Blue Prism** – together with **TrustPortal** – have introduced a new category that gives organizations the best of both worlds.

Blue Prism’s *Autonomous Automation* RPA platform works in concert with TrustPortal’s intuitive front-end interface – essentially handing off work between a person and a robot when the situation (or customer) calls for it. The robot handles the work on the back end, while the user can decide if it synchronous or asynchronous.

Understanding where AI can deliver change – and how software robots can act as humans to deliver consistent processes and support the human workers – is key to large-scale transformation and a better customer experience. For example, TrustPortal conducted detailed studies with several global clients and found that:

- Digital platforms can enable 25-30% self service improvements
- However, by combining this with RPA, we see 70-85% productivity improvements in end-to-end processes



And, the wide range of use cases that can be automated is only limited by the imagination and process variation across all organizations. The integration of Blue Prism’s intelligent automation expertise and TrustPortal’s digital platform gives enterprises:

- **Increased Efficiency:** Digital interaction with legacy systems is often technically or cost-prohibitive. With TrustPortal/Blue Prism, any process can be digitized and automated end-to-end.
- **Cost Savings, Better Service:** Increased efficiency translates into a significant reduction vs. the cost of manual processes – and services that are delivered more quickly, more accurately, and with higher customer satisfaction.
- **Security & Compliance:** Leading encryption technology ensures that only authorized “key” holders can access data and that all data held in TrustPortal is secure.
- **Easy Integration:** Add technologies in response to customer demand – including real-time engagement through web, mobile, chatbot and voice channels.

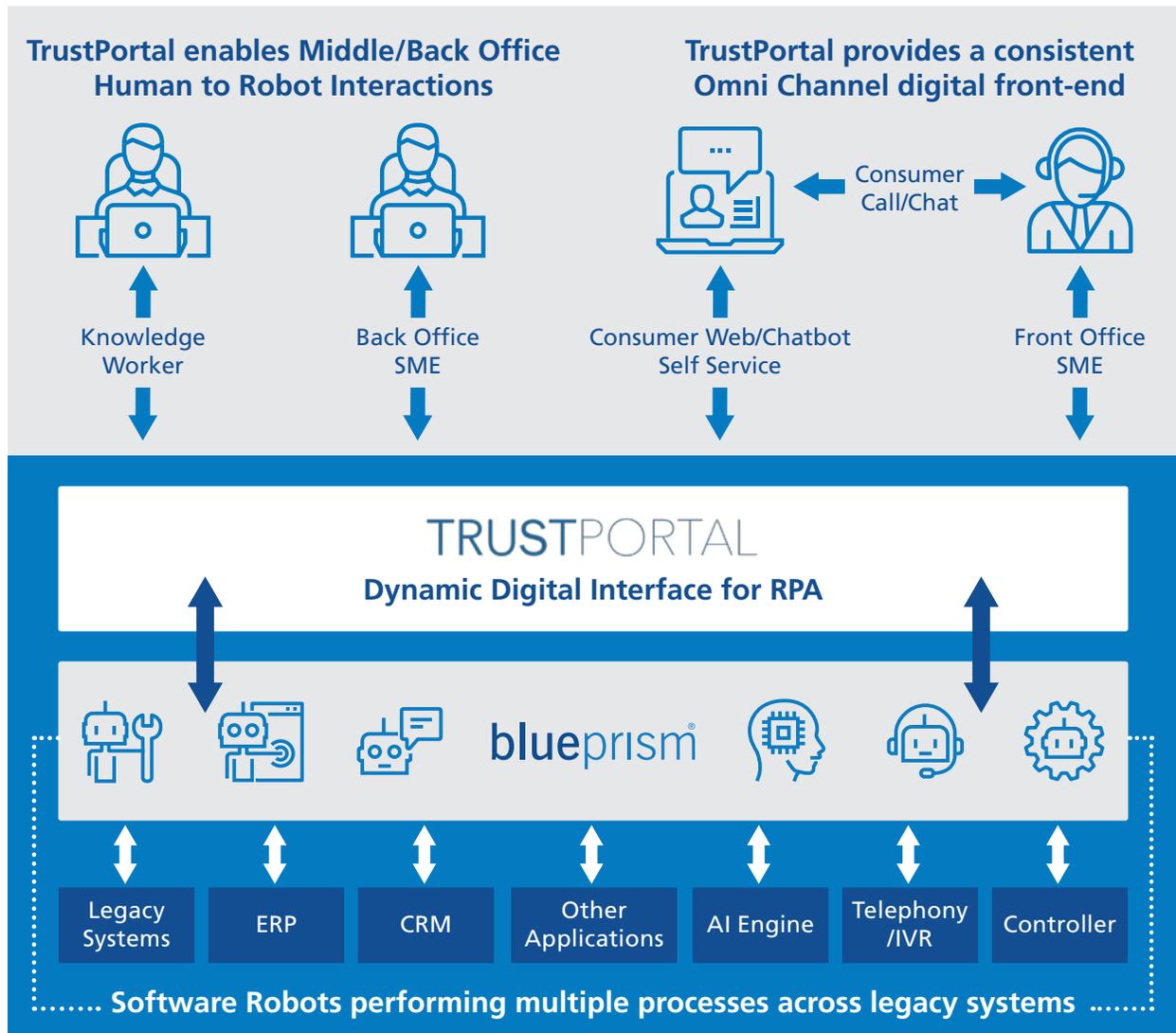
VI. The Human-To-Robot Connection: a Single Customer View

The common element that delivers large scale efficiencies in human productivity and wide scale RPA is where there is a dynamic, real-time, Human-to-Robot interface.

TrustPortal provides secure Human-to-Robot conversations, enabling end-to-end process automation. Through dynamic interactions with the Blue Prism platform, we can create a human and digital workforce that communicates in real-time to support dynamic hand-off tasks within a process.

In the diagram below, customers get instant access to identity and security questions and then a view of their information, product and services.

The ability to leverage robot processes to build a common data set and use Human interaction to verify or approve streamlines the contact – and demonstrates to the customer that the business has their full interests and information on hand.



Blue Prism enables multiple system access and dynamically creates the data set and questions for the human to verify, ensuring that the process and configuration is in one place. And, internal staff don't have to worry about coding or simple process flow definition.

Customers can use the TrustPortal mobile app, AI-enabled chatbot, web portal, or contact center portal to ensure consistent access to the data and process/ interaction updates. Advantages include:

- TrustPortal can use customer data to drive multiple robot processes to retrieve information from multiple systems and present data set to the human to review.
- This process complies with GDPR and allows the customer to check and correct any data inaccuracies.
- This core dataset can be held for future customer engagement.

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VII. AI & Voice Chatbot Capabilities for Business Self-Service

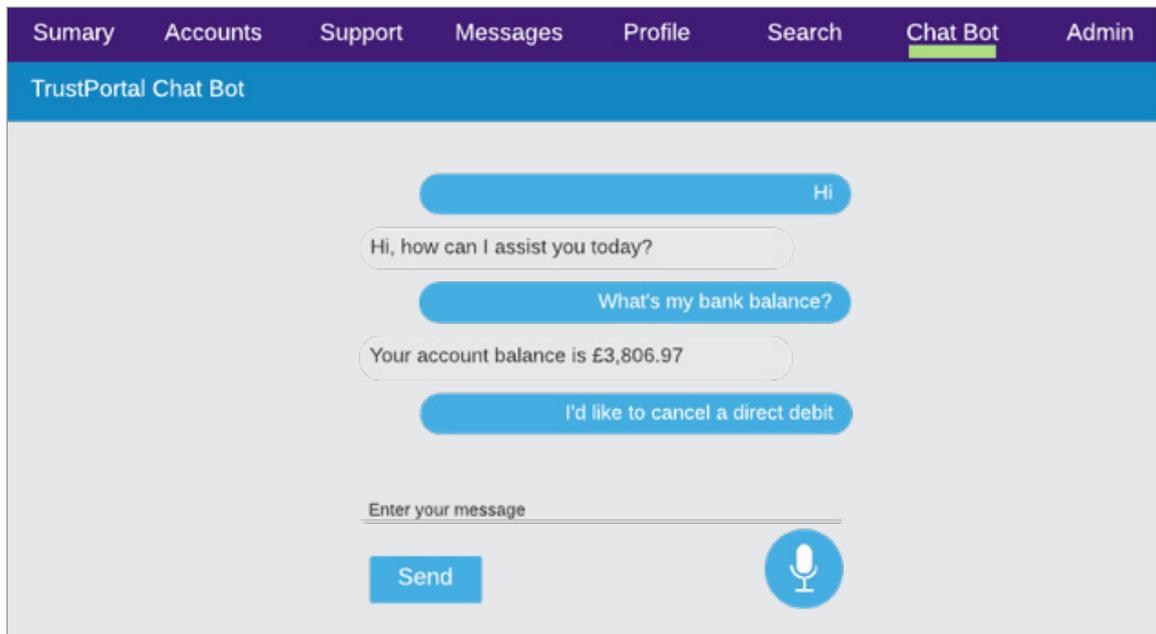
Businesses know that they need to adapt to address changes in customer demand for chatbots and are concerned with the instant need for humans to react and respond.

The real business benefit is enabling real self-service processes in a timely response. The new TrustPortal Chatbot solution offers immediate delivery using the latest Google AI and Voice libraries and is now available within a standard SaaS deployment, including:

- TrustPortal-embedded chatbot enabling users to use the identification and verification and access to their user profile and data set
- Google AI and voice recognition to understand the customer request (we can also connect to other services as required)
- TrustPortal secure connection to Blue Prism robot controller and queue prioritization management
- Real-time secure caching of customer data, which is then delivered back to the customer
- Accurate time delays shared on information retrieval to improve customer expectations of processing time for end-to-end updates
- Messaging back to customer process completion within context of conversation

VIII. Trustportal & Blue Prism: Better Customer Experience, Richer Engagement

The TrustPortal and Blue Prism integration means that organizations can now build a customer portal in days. Organizations can also leverage concurrent robot processes within a conversation to deliver as real-time an experience as possible. The diagram below shows a customer of the chatbot.



Should organizations require longer end-to-end processes, the customer can initiate and authorize a process, get updates on expected processing time, and await an offline update via TrustPortal messaging, text, or email.

TrustPortal works with Blue Prism to enable prioritized tasks across multiple robots into multiple systems. If the robot process has any queries, then it will dynamically create the data set and questions for the human to verify.

The Blue Prism platform instantly passes this request to TrustPortal, creating a dynamic dialogue. The dynamic form creation is also configured within the Blue Prism processes. TrustPortal can also enable real time chatbot via close integration with Blue Prism

Robot Controllers and Objects to enable multiple robotic processes at once. Enterprises benefit from:

- **The combination of RPA with a dynamic front end**
 - Enable employees to interact w/ customers across all interaction channels and multi-platform processes
 - Extend Back/Middle office robotic process by introducing complex issue resolution by employees
 - Expand processes that can be automated beyond those for unattended robotic interactions

- **A fully-encrypted, dynamic platform**

- Dynamic form creation based on rules and interactions streamlines the customer experience to avoid duplicated data requests
- Users can have a ‘conversation’ with a robot in real-time

Together, Blue Prism and TrustPortal offer a unique opportunity for organizations to quickly deliver higher levels of customer experience through digital engagement and end-to-end process consistency.



About Blue Prism

As the pioneer, innovator and market leader in Robotic Process Automation (RPA), **Blue Prism** (AIM: PRSM) delivers the world's most successful Digital Workforce with software robots that automate repetitive administrative tasks and meet the requirements of the most demanding IT environments. Blue Prism provides a scalable and robust execution platform for best-of-breed AI and cognitive technologies and has emerged as the trusted and secure RPA platform of choice for the *Fortune 500*. For more information, visit www.blueprism.com.

About TrustPortal

TrustPortal is a dynamic software company focusing on innovative developments in the RPA industry. With proven industry-wide solutions, TrustPortal is well positioned to become a world leader in enabling Robot-to-Human (R2H) digital services. TrustPortal's secure and scalable solutions deliver new levels of productivity, cost savings and interaction simplicity to enterprise-wide automation strategies. Visit www.trustportal.org

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