

# Building A Center Of Expertise To Support Robotic Automation

Preparing For The Life Cycle Of  
Business Change

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## Table Of Contents

Executive Summary .....	1
What Is Robotic Automation .....	2
Establish A Robotic Automation Center Of Excellence .....	4
Understand Where You Are On The Robotic Automation Journey.....	5
Overcoming Key Challenges On The Robotic Automation Journey.....	6
Key Recommendations .....	10
Appendix A: Methodology.....	11
Appendix B: Demographics .....	11
Appendix D: Endnotes.....	11

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## Executive Summary

In today's challenging economic climate, enterprises struggle to respond to the changing needs of their customers while still running efficient and effective operations. To remain competitive, business leaders often demand the organization operates with far fewer people — whether it is government or a large corporation, personnel cuts of 30% to 40% are an unpleasant fact.

To respond to this conundrum, technology plays an increasingly important role — it helps automate processes and deliver work to the relevant worker. However, there is a catch. Legacy and heritage applications that support existing propositions and core business processes can act like a millstone, impeding the ability of the organization to adopt new ways of doing business. On the one hand, we need the benefits of automation, yet on the other, we don't dare change these existing applications for fear that something might break.

This is where robotic automation comes to the rescue. Robotic automation refers to a style of automation where a computer mimics a human's action in completing a task — effectively a computer drives application software in the same way that a user does.

Blue Prism commissioned Forrester Consulting to evaluate the challenges of creating an effective robotic automation service. Forrester hypothesized that while robotic automation was quite different from traditional business process management (BPM), creating such a capability had very similar challenges to those faced by BPM programs. Furthermore, while creating a standalone robotic automation group might be the start point, to survive and thrive in the wider organization, this group needs to be chartered effectively from the get-go; and that charter should be integrated into wider business improvement efforts. Over time, robotic automation becomes another tool in the change management toolbox, enabling automation of repetitive processes yet avoiding the pain of systems change and complex integration.

To validate this hypothesis, Forrester conducted in-depth interviews with a dozen organizations. We found that these early users of robotic automation achieved significant economic benefits, but they ran out of steam when they tried to move past the initial business scope. However, when deployed as a part of a broader process improvement program, they continued to deliver benefits.

**Legacy and heritage applications can act like a millstone, impeding the ability of the organization to adopt new ways of doing business.**

### KEY FINDINGS

Forrester's study yielded three key findings:

- › **Robotic automation complements BPM efforts.** To become agile and efficient, enterprises need both BPM suites and robotic automation. Savvy enterprises use people, robots, and BPM systems to get the work done. Adding a robotic workforce into the mix of people and process automation tools gives a broad range of benefits.
- › **A center of excellence (COE) provides an effective organizational form.** Delivering on the promise of robotic automation implies developing a range of competencies and scaling that across the organization. A COE provides a better way of developing the necessary knowledge and capabilities.
- › **Take a phased approach when developing your robotic automation capability.** For long-term success, firms do best when they prove the value of the approach using a focused project or two before signing-off on the enterprise-wide business case. Of course, once proven, managers need to plan for the deluge of opportunities that will inevitably present themselves.

## What Is Robotic Automation?

Robotic automation provides a way of reducing operating costs while also facilitating agility as the organization responds to customers' evolving needs.<sup>1</sup> Robotic automation involves the provision of software tooling that enables organizations to automate existing user actions — as if the user were moving through and across their current raft of applications.<sup>2</sup> There are many opportunities for robotic automation in major businesses, including:

- › **An alternative to outsourcing.** The outsourcing of non-core or utility processes appears to provide a universal panacea, delivering drastic cost reductions.<sup>3</sup> However, outsourcing service providers govern these relationships with tight contractual terms, such that all exceptions revert to the organization to handle, and even the smallest changes or variations in processes can lead to big cost penalties. As a result, the promised cost reductions never quite materialize.
- › **An alternative to offshoring.** Another strategy associated with cost reduction is to create a dedicated resource pool in a low-cost labor economy. Many offshore arrangements function more like captive outsourcing providers. Despite the cost advantages of offshore resources, a fully loaded robotic automation “virtual worker” is typically around one-third the cost of a similar resource in a low-cost labor market. While this tactic offers the short-term opportunity to pursue labor arbitrage, it does not create a sustainable advantage and the downside is that this can significantly reduce an organization's ability to adapt.
- › **Dealing with the long tail of change.** In most businesses, there are just too many demands on the IT function. Inevitably, managers dedicate their scarce IT resources to high-priority items. They weigh up value and benefits delivered of each project. Nevertheless, as the manager of one operations manager put it, “The dirty interface between these two systems continues to be a problem and consumes resources for no value, with employees providing swivel chair integration.”
- › **Overcoming peaks in demand.** A virtual FTE delivers significant cost reduction — about one-ninth of an onshore worker. Rather than incurring the additional people costs of a predictable spike in demand, it's best to explore the opportunities to delegating the routine and repetitive work to a virtual worker who can put in a 24-

hour day without complaining. Indeed, once you do this, you will then be able to focus on developing the people you have.

- › **Automating repetitive and tedious work.** Robots can undertake non-critical activities or tackle highly repetitive and tedious work. Using robotic virtual FTEs for these sorts of activities enables organizations to proactively address operational deficiencies, which in turn can lead to cost savings and/or a reduction to inbound calls.

A good example of this is the reaction of UK banks to their liability around the professional personal indemnity (PPI) miss-selling. To handle the very large volume of claims, robots applied a set of rules to ensure they were treated fairly and consistently, routing work items to the correct team and retrieving information from the various banks systems to speed up assessments.

- › **Driving operational agility.** Organizations can quickly assign virtual workers to new process tasks as business needs and priorities change. Moreover, following M&A activity, firms need to integrate their processes and systems. In these situations, robotic automation can provide quick and accurate “process bridges” between applications.

The key point to understand is that robotic automation doesn't replace existing applications; instead, the software works with those systems and their user interfaces to perform the work.<sup>4</sup> While robotic automation may appear superficially similar to BPM suites, the mechanisms goals are quite different (see Figure 1). Indeed, robotic automation efforts complement the use of BPM suites and human resources to get work done. The trick is to put them together in the right combination to achieve your strategic goals.

**FIGURE 1**  
**How Robotic Automation Differs From Business Process Management Suites**

Aspect	Robotic automation	Business process management
Business goal	Focuses on replacement of FTEs with a “virtual worker”; cost reduction and enabling the long tail of change.	Re-engineering of the underlying process to drive efficiency and create a more consistent customer experience.
Technological goal	To automate processes without changing, replacing, compromising or adding maintenance overhead onto existing applications; cost reduction and enabling the long tail of change.	Creation of a new application.
Process conception	Automation of repetitive tasks. Simple workflow details what the software agent does as it goes through applications.	Comprehensive process models manage work items through entire business.
Integration method	Presentation layer integration reuses existing applications user interface, leveraging existing web services if needed.	Data passed between new application and back-end systems, bypassing the established user interfaces.
Testing required	Given that robots have the same capabilities as existing users, there is no requirement for additional system testing.	Extensive additional testing required as data layer integration creates brittle interfaces between applications.
Accessibility	Once set up by IT, business analysts and administrators can self-serve.	Software developers needed to configure complex development user interface.

Source: Forrester Research, Inc.

However, while robotic automation technology has subtle distinctions with BPM-oriented business improvement efforts, robotic automation programs can run into similar organizational challenges:

- › **Individual lines of business (LOBs) are most interested in a short-term fix.** Typically, they are looking for a Band-Aid that ameliorates their immediate problem, with benefits delivered in the next quarter or two. From the perspective of the silo, they see little benefit in collaborating with other departments. As a result, when these projects complete, the benefits are not visible to other functions and the knowledge associated with the

how those benefits were achieved is lost to the wider enterprise.

- › **Each project has significant organizational change elements associated with it.** Robotic automation efforts can take on the appearance of a workforce reduction exercise. Therefore, it’s important to manage the change and communication carefully. In each operational area that’s affected, there’s a different battle for the hearts and minds of managers and employees.
- › **The work associated with creating the business case for one function doesn’t necessarily apply to the next.** Their processes are usually different and they will have a different mix of knowledge workers and support staff.

Moreover, uncoordinated projects make it hard to share technology resources and grow skills and knowledge. The expertise and focus required for long-term success becomes fragmented and is difficult to maintain. And even with a dedicated group, recruiting suitable resources still can run into all sorts of problems.<sup>5</sup>

- › **Robotic automation projects are ultimately business-driven, but IT must set up the underlying facilities.** IT has a significant role to establish and maintain the underlying infrastructure for robotic automation. Quite apart from the IT governance angles and securing access, a typical robotic automation project will need to leverage the existing networking infrastructure to access the existing applications, which may require encryption; along with set up of the virtual resource agents and to ensure appropriate process logs are maintained.
- › **Robotic automation implies developing skills in the business and IT.** In order to maximize the benefits, organizations need to invest in building the related skills. Over time, this reduces the reliance on external support and consultancy, allowing firms to more cost-effectively identify, and deliver on, opportunities for automation.

Without planning, these sorts of issues make it difficult to create a sustainable robotic automation strategy. By its very nature, robotic automation efforts will make existing functions look more efficient. Ultimately, that function is able to handle more repetitive work with fewer resources. While delivering a step change in productivity, achieving another step change over and above the immediate efficiency improvement is challenging. It's how you prepare for this sort of nuance — communicating the benefits effectively — that will make difference in achieving long-term success for your robotic automation program.

## Establish A Robotic Automation Center Of Excellence

To overcome these challenges, well-informed organizations take a center of excellence (COE) approach. Rather than limping from one project to the next, they see the wider opportunity and plan accordingly. In a sense, this project-by-project mode is the precursor to the creation of a COE. In its purest form, a COE is an organizational unit that provides a set of clearly articulated, business-related services in support of the enterprise's core objectives. It helps other business units and functions achieve their goals. A COE helps organizations by:

- › **Ensuring the capability is set up appropriately in the organization with effective governance and controls.** Rather than struggling to charter each project one at a time, the COE helps establish the capability with a rollout plan across the enterprise.
- › **Establishing effective project governance.** In some businesses, the business unit or function that shouts loudest gets its project approved, regardless of the value or benefits delivered. A COE can provide a neutral point to coordinate business improvement opportunities. This typically involves linking those opportunities back to a performance management framework and establishing good governance practices over project selection.
- › **Delivering and tracking benefits over time.** For example, over the last four years in a relatively mature \$35 billion chemicals business, their BPM COE has improved productivity by about \$1 billion per year. This figure, celebrated by the CEO in communication with stockholders, is based on a large number of small projects, each of which is tracked and governed from the COE.
- › **Assessing methods, tools, and approaches.** The COE provides the best home for organizational knowledge around the business capability. In the case of robotic automation, the challenge becomes embedding those skills needed into the business units themselves, developing the mindset and expertise of business analysts, business architects, and business administrators.
- › **Coordinating technology vendor management.** While different business units may make use of technology, having a central group to coordinate purchasing decisions makes a lot of sense from the perspective of the organization as a whole. The COE becomes the natural focal point to negotiate better rates and share resources.

## Understand Where You Are On The Robotic Automation Journey

Most organizations going down the robotic automation path are on a journey — while the long-term goal might be apparent, how to get there and the challenges on the immediate road ahead are usually far less clear. Therefore, learning from other travelers that have been down the road before can help you avoid obstacles and chart a route that moves the organization forward. It's best to think about your own journey and figure out where you are against the following phases of organizational development:<sup>6</sup>

- › **Phase one: assessing robotic automation.** The first step is to develop an understanding of what this technology can do and how it works.<sup>7</sup> Firms will want to identify a few “low-hanging fruit” or “quick-wins” — i.e., where the benefits are significant and the level of investment low — as well consider the overall size of the opportunity. Rather than establishing a COE straight off, project teams usually focus on a promising candidate to understand the challenges, opportunities, and benefits.<sup>8</sup>
- › **Phase two: chartering the COE and setup.** Once the initial tactical experiments are bedding down, the organization is probably ready to start considering how it will establish the COE. Having understood the issues and considered the needs of all stakeholders, the core challenge is to create the charter for the robotic automation team appropriately with suitable oversight and executive attention.<sup>9</sup>
- › **Phase three: sustain and scale.** There's a big difference between your stance when setting up for initial project success and when you are dealing with the deluge. Predictably, as managers become aware of the power of the approach, they will want to deploy the approach within their own fiefdom.<sup>10</sup> As the manager of COE in one large bank put it:
 

“You need to clearly articulate how you will triage the pipeline. . . . you start having to beat the bushes and then end up dealing with the flood.”
- › **Phase four: embedding robotic automation in the business.** It can take several years of successful project delivery before you get to the next level. In a sense, your objective is to grow a satellite robotic automation group in each function. Having developed as an internal consultancy, the robotic automation group may now be subsumed into a wider process improvement COE (it may

have been a part of one all along). Either way, in the end, there is a lot of overlap between a group focused on robotic automation those focusing on continuous improvement and Lean Six Sigma.

## Overcoming Key Challenges On The Robotic Automation Journey

For every organization, the journey it is on is different. Each business has its own particular culture and history; each has its own governance and functional structure, each with its own performance challenges. However, as organizations move through the phases — and particularly at the transitions from one phase to the next — there are common challenges.<sup>11</sup>

### PHASE ONE: ESTABLISHING ROBOTIC AUTOMATION

The key objective is to prove the value of robotic automation in order to win support from the executive and gain buy-in for the creation of a COE (see Figure 2). Moreover, these quick-wins can deliver early benefit, which in turn can fund a broader strategic program. Those charged with establishing the capability want to know how to build the business case, what the road map looks like, and how to engage their colleagues.

The first step is to carry out a tactical project to develop skill and experience, while also quickly demonstrating a clear business benefit. That way, instead of the usual resistance to change, business execs and line of business (LOB) managers queue up for their chance to drive massive improvements in their own business area. The problem then becomes one of managing demand. The initial challenge involves identifying the proverbial low-hanging fruit and then managing the scope, budget and timeline to ensure a successful delivery.<sup>12</sup>

For example, in one telecommunications organization, the executive in charge put it like this:

“When vetting opportunities, you need to know the size of those ideas. How much of that opportunity meets our cost benefit objectives; or is it driven by some change imposed by the regulator? You need to know the management information around those processes. I was lucky in that I had good information. Many do not have that luxury. So when we looked at work coming from an offshore provider, I was able identify the range of benefits. In the end, if you can’t quantify the benefits, then where is the business case? The business loses interest.”

Assuming you have done most things right, you’ll want to focus now on building a more focused robotic automation capability.

**FIGURE 2**  
**Typical Challenges During Phase One**

Critical challenge	Resolution
How can I effectively evangelize to execs and to the rank and file?	At this point, you need to demonstrate that robotic automation projects are entirely manageable and achievable. Senior managers will be wary of another “silver bullet” that fails to deliver on the promise. Set expectations appropriately for the long-term journey ahead.
What considerations are there in selecting the initial project?	Typically, there is a significant problem to address, but take care that it is not too big and too complex. Often it is better to choose a relatively small self-contained project to prove the viability of the approach. Project success will help win the hearts and minds of skeptical managers and will help iron out the internal kinks. The selected project should be important enough to avoid being seen as irrelevant. It will also need to deliver a key benefit to a defined group of staff and allow for rapid implementation.
What does the road map look like? What are the milestones?	Focus on communicating the long-term vision, building a set of agreed stage gates based on the phases set out in this paper. During this phase, the key objective is to achieve initial project success, on time and within budget.
How do I build the business case within the organization?	At this point, it is often not appropriate to establish a pan-organizational business case. You first need to prove the value. Base your initial business case on the identified project(s) for phase one, but highlight the broader opportunity. Make sure you undertake a baseline assessment of current costs and outline approach.
What technological resources will I need for the first robotic automation project?	Your first automation project will need a small technical team to establish the environment, including set up of virtual machines and databases. You’ll also need to establish security and governance policies over models, data and third-party applications, as well as core project management and operational scheduling.

Source: Forrester Research, Inc.

## PHASE TWO: CHARTERING THE COE, ROLES AND RESPONSIBILITIES

Having executed a project or two to prove the value, you’re now charged with creating a strategic capability for the organization (see Figure 3). At the core of this, you will want to focus on how that group is chartered and how it interacts with business units and departments. You’ll need to find the right resources and consider how they are deployed and the management of projects. The size of your COE will depend

on the scope and appetite for robotic automation.<sup>13</sup> Alongside that, you will need to clarify and configure the tools you will use to support your robotic automation strategy and clarify the methods used in service delivery.

**FIGURE 3**  
**Critical Questions During Phase Two**

Critical challenge	Resolution
How do I build the enterprise business case for robotic automation?	Having proved the value at a project level, you now have the solid internal proof points for a broad organizational program. Whilst you may have estimated the benefits and challenges during phase 1, you can validate the organizational opportunities. Ensure that you highlight the change management issues and risks, along with mitigating factors.
What are the proven tactics for measuring the success of robotic automation efforts?	Develop a benefits register to track the reduced operating expenditure of business units and departments and value delivered to the firm. To support this, it's absolutely vital that you ensure that a baseline assessment is undertaken for each project area.
How do we deal with the plethora of potential projects?	Given initial project success, you will now have more opportunities than you have resources available. Ensure that you select projects that: a) contribute to the overall business strategy, and b) have committed business partners. In order to take the politics out of the discussion, assess business impact/benefit against the complexity and cost.
What does the road map look like? What are the milestones?	Start off by designing a set of “services” that the COE will provide to the organization. Clearly define your service delivery model, the scope of services provided, the stages involved in that delivery, and the role requirements. Clarity is the key. You'll also need to think about the competencies needed for those services.
What are the business-level responsibilities associated with robotic automation projects?	At this stage, it's important to clarify exactly how you will engage with the business unit and what resources/commitments are expected on their side. For each project, you'll need a committed business sponsor, process owners, and one or more subject matter experts (SMEs).
What internal responsibilities will I need in the robotic automation COE?	Project manager/business analyst to manage robotic automation projects, paying special attention to change management issues in the business, managing expectations. They will gather requirements and become the business interface of the COE, working with process owners to prioritize the work moved to robotic automation. Developers will need to work with business analysts and SMEs to build out processes, setting up any web services calls and integration needs. Technical resources will overcome networking issues, ensuring the deployment of the virtual robots in the data center. This role may also take responsibility for prioritizing, scheduling work, and sharing robots across projects.

Source: Forrester Research, Inc.

### PHASE THREE: USING THE PERFORMANCE FRAMEWORK TO SUSTAIN AND SCALE

Now that the COE is established, it becomes a question of ensuring that it delivers on the strategic imperatives of the firm. Our research shows that as organizational improvement efforts mature, they start to focus more on producing better customer outcomes.<sup>14</sup> It's not that cost reduction is no longer an issue, it's more that the emphasis changes to creating a sustainable organization, which ultimately is about driving agility and creating more loyal customers. Robotic automation also has a strong part to play in driving those outcomes — it helps ensure that the constraints of existing systems do not hold back the organization.

You should now be focusing on how you develop and brand the services you provide to the enterprise — exactly where and how do these teams deliver value; what's the experience that your internal customers will receive? You'll need to figure out how to develop your people — how their competencies evolve, what levels of maturity are needed, and what's the development plan to progress from one level to the next.

As one COE leader in a major insurance group put it:

“Highlighting the value of delivery teams is a constant challenge for the COE leader. We've just done that for XYZ Co. . . . putting together a good business case for functional managers to help them understand the benefits and how they can take part in our robotic automation initiative . . . it's no longer just about tools and methods; it's now about the interaction model and the change management aspects. Change takes times. It's a heuristic process — you adapt and learn, and try something new. The group starts showing the traits of becoming a learning organization. Our next challenge is to embed that within the wider enterprise.”

Identifying projects and balancing the portfolio of change projects becomes a key challenge. Just like a consulting business, within the COE, you'll need to ensure that you balance the work you take on and your available resources. It is here that the work you have put in on chartering your COE will pay off. Finding appropriate projects and managing the demand become an order of magnitude easier when there is a clear mandate from business leaders. You'll need to develop a performance framework — something that defines your strategic intent, your expected outcomes, and

the benefits delivered. If you do it right, you get active feedback into the decision-making processes of the business leaders themselves. This type of artifact can then influence the tactics you are applying in scaling your robotic automation program.

### PHASE FOUR: TURNING ROBOTIC AUTOMATION INTO BUSINESS AS USUAL

Ultimately, robotic automation becomes an important tool to complement continuous improvement and business process automation efforts. The challenges evolve as the business itself embraces the opportunity for robotic automation to change the way in which it serves its customers.

But it also means changing the business mindset — how business architects and strategists respond to a new business opportunity, and how they factor robotic automation into their toolkit.

As one manager put it:

“When coming up with a new business proposition, the prevailing mindset was that the back office would handle exceptions. Now, we want them to think robotic automation rather than back office. This represents a mindset change for business managers. We want them to think first that robotic automation can handle this exception. For us, that means there's an education process; one that spans the organizational strategists, business development, and project managers — those involved in developing propositions for the market. We help them understand that robotic automation is part of the toolbox for operational managers. When it is not possible to create an end-to-end solution to the problem [with say a BPM suite or system of record] you then look at robotic automation to handle the challenge, and only if that can't handle it do you get to add to the outsourced/offshored/back office resource overhead.”

## Key Recommendations

To set up your robotic automation effort for the long term, our research uncovered the need for the creation of a center of excellence (COE). If such a group already exists focused on BPM, think about how robotic automation works to complement the process automation efforts already underway.

Key ingredients for the successful realization of the COE include:

- › **A compelling road map vision for the long haul.** You need to think about how your team will not only come into existence, but the sorts of stages and support it will need over time. Moreover, without a clearly articulated vision of how the team adds value to the business, you'll struggle to gain suitable investment and resources. You need to think about the stages your group will go through.
- › **An effective engagement model.** At the heart of this is the charter and governance model for the activities of the unit. That charter will need to explore how the team finds its work and decision-making around the work that it addresses. Of course, that will evolve as the unit matures and the context of the business challenge evolves.
- › **Development of a service portfolio.** With the COE focused on assisting other parts of the business to achieve their goals, the service portfolio sets out standard offerings to the business, making it easier to sell and articulate that value proposition. The services of the COE represent an encapsulation of how the unit delivers value, how it delivers the capabilities of the available resources, and the experience delivered to business units.
- › **A robust performance management framework.** As such, it provides the basis for comparing and contrasting potential projects, capturing management information and key process indicators around the current state and future benefits. It also underpins the ability to track the benefits delivered. Moreover, with better governance around project set up and expected benefits, our research shows that project success is far more likely.<sup>15</sup>
- › **A focus on skills and competencies.** When building your services, think about the responsibilities needed. How those responsibilities collaborate to achieve the goal. Then describe how the skills and competencies of your resources — and those within the business units you serve — map onto those responsibilities. Work out how you are going to grow those skills and competencies in the business, such that they become part of business as usual.

## Appendix A: Methodology

In this study, Forrester conducted detailed interviews with 12 large organizations in seven countries to evaluate best practices and pitfalls associated with the creation of organizational centers of excellence (COEs). Forrester focused on those running COEs. Participants were questioned on the responsibilities and services of the COE, how they were chartered, and the benefits derived by the organization and the challenges they encountered. Respondents were offered a copy of the report as a thank-you for time spent on the survey. The study began in November 2013 and was completed in December 2013.

## Appendix B: Demographics

**FIGURE 4**  
**Interview List**

Job title	Industry
COE manager	Chemicals
CEO	BPO
Service manager	Banking
Global transformation manager	Insurance
Senior development manager	Electrical utility
Customer support manager	Telecoms
COE manager	Telecoms
Process excellence manager	Life sciences
Head of business architecture and change management	Energy and utilities
Global process manager	Logistics
Robotic automation manager	Banking

Source: Forrester Research, Inc.

## Appendix D: Endnotes

<sup>1</sup> In one large energy utility, robotic automation is delivering about \$6 million per annum in savings. With a relatively mature robotic automation function, one major telecommunications provider estimated that for every \$1 spent on robotic automation,

it receives \$8 in reduced operating expenditures and resources. Other benefits include delivering a better overall customer experience as a result of fewer errors and timely delivery of customer-related information.

<sup>2</sup> Users who work across several applications at once, cutting and pasting from one to another and perhaps storing the results in a spreadsheet or Access database along the way are often said to be performing “swivel chair integration.”

<sup>3</sup> As businesses review their operations, they will usually undertake a detailed review of their organizational capabilities, assessing which ones are core and non-core, utility or differentiating. Their underlying objectives may include a reduction in operating costs, an increase working capital, error reduction, or enhancement of compliance.

<sup>4</sup> Source: Charles Sutherland, “Framing a Constitution for Robotistan,” HfS Research.

<sup>5</sup> For example, in one major business, with a robotic automation group delivering multimillion dollar benefits, the head of organizational change put it like this: “We have had to get others in to assist us. The key constraint is around the resource budget. We have a chicken and egg situation. Rather than looking at the operational savings and calculating the benefits, we only get to hire based on the resource budget. Although we are making significant savings, it’s not enough to get this onto the budget radar for the board of directors to consider.”

<sup>6</sup> These phases might also be thought of as a maturation process for the robotic automation strategy with the organization.

<sup>7</sup> Rather than labeling this phase as a “pilot project,” we recommend the use of the phrase “tactical experiment.” The underlying reason is that the word *pilot* says to many people in the organization that it may or may not succeed. As a result, they do not give it their full attention and it increases the chances that the robotic automation program will fail. On the other hand, when we use the language of tactics and experimentation, it says to employees that this is something we are setting out to understand and learn about.

<sup>8</sup> The team should pay special attention and keep notes on what’s needed to make this project a success. Identifying a suitable project is outside the scope of this article. Nevertheless, it’s incumbent on all participants to prepare for the next phase by capturing all aspects of the project and feeding it back into the preparation for phase two.

<sup>9</sup> This is as much about handling the inevitable politics in advance as it is about creating roles and responsibilities.

<sup>10</sup> You will need to teach them how to fish, to then fish with them. But at the same time, you will need to be selective on who you fish with.

<sup>11</sup> Here we have combined our recent quantitative research into change programs with the qualitative research undertaken in support of this Thought Leadership Paper. Source: “Focus On Customer Value To Grow Organizational Maturity,” Forrester Research, Inc., January 2, 2014.

<sup>12</sup> It’s also vitally important that team members, IT, and business managers adopt the right frame of mind in this phase — the goal is to learn and uncover the organizational challenges.

<sup>13</sup> You’ll want to make sure you recruit the right people. They need to be self-starters with a passion to improve the organization and make things easier for others. A useful phrase from one of our interviewees — “Think will and skill — you can train for skill, but you need find the will.”

<sup>14</sup> Source: “Focus On Customer Value To Grow Organizational Maturity,” Forrester Research, Inc., January 2, 2014.

<sup>15</sup> In our recent survey of organizational change programs, we looked at the project success of respondents that had relatively mature business architecture practices — scoring 3 or above in project governance. Of those, 84% reported that projects met or exceeded their expectations. Only two of these organizations experienced project failure; and just four respondents felt that although the initially scoped project had failed, it was considered a success because it delivered other benefits.