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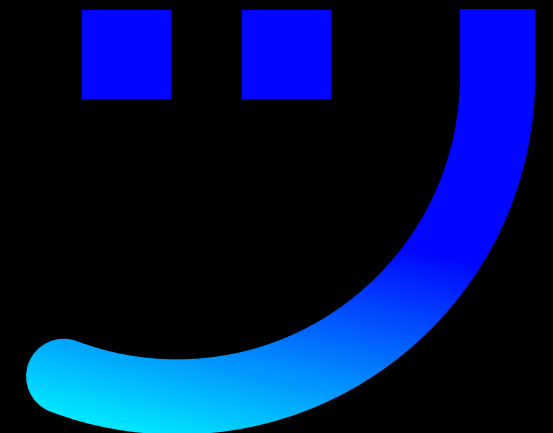
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THE 5 MUST-HAVES OF ATTENDED AUTOMATION

Discovering the true value of the partnership between employees and robotic desktop automation

WHITE PAPER



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From Process Automation to Strategic Automation

Robotic process automation (RPA), also known as unattended automation, has been widely embraced on a global scale in sectors as varied as telecom, financial services, government, and retail. Automating repetitive or routine tasks is now a common solution for streamlining and optimizing back-office business processes.

And the numbers demonstrate why. The introduction of RPA into an enterprise produces, on average:

- 50% faster processing time
- 25% greater efficiency
- 100% accuracy
- Savings in labor, HR, and training
- Infrastructure savings

In addition to clear productivity and efficiency gains, companies can quickly and easily scale up or down in response to changing capacity or growth. Need more hands or more processing power? Just add more bots.

However, the automation journey need not end there.

The next step is attended RPA, also called attended automation or robotic desktop automation (RDA), and it brings the power of automation into front-office interactions. However, attended automation bots need to have richer capabilities than their process automation siblings, as they operate in tandem with a dynamic human workforce.

Attended RPA bots assist agents in real time with everything from necessary background information on a given customer alerts to situation-specific scripts, next-best-action guidance, identification of sales opportunities, and more. This improves their quality of service, helps them meet all compliance requirements (such as reading disclaimers or obtaining confirmation before moving on to the next action), makes adjusting to changes easier, and reduces training time. The bots also automate tasks like data searches, completing fields in a form, updating databases, creating call summaries, sending default emails and other after-call work, as well as triggering unattended automation to complete additional back-office tasks.

While unattended automation is designed to drive productivity, measured in handle time and efficiency KPIs, attended automation expands the impact of automation to include boosting employee potential and increasing customer engagement. This is reflected in more strategic KPIs like first contact resolution, training time, employee retention, customer experience, compliance, and up-sales.

For maximum success with those KPIs, in line with the shift toward prioritizing CSAT and ESAT, your attended automation must have the following five capabilities.

Must-Have 1: Interactive, Customizable User Interface

Interactive screens, displayed on the employee's desktop in specific predefined scenarios, are essential to attended automation. They show the agent the next best action, with appropriate contextual information, scripts, and options when needed. This might include text fields that are automatically or manually filled in, tabs for multi-step processes, quick-links, drop-down menus, and whatever else would assist the user best.

Customizability and flexibility are essential to the bot's interactive screen. The UI can be simple or very sophisticated, depending on the use case and desired level of guidance, with a look-and-feel that suits the business and the type of user. Moreover, as desktop settings will vary depending on individual preferences, attended automation technology should function equally well at any size and resolution, and from any location on the screen.

The benefit of this must-have includes a greater likelihood of adoption by users and reduced frustration, which ultimately improves productivity.

Must-Have 2: Automated Desktop Triggers

Real-time triggering is another key capability distinguishing the more intelligent attended automation solutions in the market. The bot monitors the employee's desktop and provides assistance exactly when it is needed, as the employee is working, in response to a wide range of actions and scenarios. A bot can, for instance, prompt employees with relevant sales promotions or offers based on a customer's unique purchase history, as well as provide sales scripts and help complete the order, freeing the employee to quickly move on to the next task.

Attended automation can be configured to activate in response to employee's desktop actions such as creating a new item, changing a field value, clicking a button, receiving a digital communication, and the like. If the automation solution includes real-time speech analytics capabilities, it can be triggered by specific language or sentiment during customer interactions. For example, robotic guidance for upselling to a customer may be automatically initiated when the agent reaches a predefined stage in the interaction, when a specific screen is accessed, or in response to something the customer said. This elevates the more common version of desktop automation, in which the agent must manually trigger the guidance workflow from a preset list of activities or an API, which is much more limited in terms of value and more likely to be overlooked.

Automated desktop triggers are the essence of the partnership between employees and their attended bots, with a significant impact on agent adoption and performance.

Must-Have 3: Operational and Business Desktop Insights

Employee desktops are a veritable gold mine for analytics. With the right monitoring, and collection tools, they can provide a wealth of data on applications used, processes executed, bot triggering, customer behavior and operational bottlenecks. For the individual agent, you can choose to track keystrokes, field entries, buttons clicked, average handle times and so on. Attended automation bots installed on employee desktops are best positioned to collect all this information, making them an invaluable tool for better understanding your business, your employees, and your customers.

The combination of real desktop data and AI provides bulletproof insights into automation and optimization opportunities. You can quickly identify and eliminate frequent, repetitive, or error-prone processes without any wasteful guesswork.

- Improve service quality by identifying top performers and sharing best practices across your organization. This level of analysis can also provide insights into how to better guide your agents in getting the most out of their attended automations.
- With rich desktop data on frontline interactions and smart analytics, you can identify customer trends, profiles, preferences, and segmentation. This improved understanding of your customers' needs ensures them a better experience throughout their journey with your company.
- Track how automations and guidance flows are being used in practice by agents, including performance analyses, which helps to identify any bots that should be modified or eliminated.

An integrated business intelligence tool can then be used to display out-of-the-box or customized reports based on the data collected.

Must-Have 4: Frictionless Automation

People are unpredictable – and an enterprise-grade RDA should be able to handle the inevitable complexities this entails. A few key examples to consider when selecting an attended automation are:

- When multiple windows, screens or instances of the same application are open simultaneously on the employees' desktop, the solution must ensure that the right automation is initiated in the right location, with the right customer information.
- A similar but critical feature is the capability to perform an automation in the background while concurrently providing real-time agent guidance.
- On typical employee desktops, many application windows are minimized or otherwise hidden from view. An effective attended automation can continue running even when the application it needs to interact with is minimized, allowing the employee to continue working on something else in an open window on the desktop.
- An employee may close an application and inadvertently shut down an attended automation mid-course. The RDA solution should be able to detect the exact point at which screen connectivity was lost and enable the automation to resume with little-to-no downtime when the app is next opened.
- Attended automation robots should have the capability to escalate complicated customer queries from a chatbot, as well as exceptions or process errors, to a human employee.

With these capabilities, the RDA solution can essentially provide frictionless automation – no matter what you throw at it.

Must-Have 5: A Single Platform for All Bot Types

An intelligent unified framework is crucial as the central orchestrator of all the multi-faceted automation capabilities your organization adopts.

A single, common design platform for the development of attended and unattended bots makes it easier to train in-house developers. It is also easier to support use cases incorporating both RPA and RDA, as the bots can be developed together and more naturally integrated.

One control room, at any scale, for monitoring, managing, and analyzing all your automations, is necessary for ensuring their continuing effectiveness. This centralization facilitates version management, upgrades, restarts, shutdowns, and remote configuration changes, as well as rapid scalability in response to seasonal changes or peak periods. In addition, with all the activities of the robotic workforce recorded in one location, tracking down a process error or meeting audit requirements can be easily and quickly accomplished.

Managing attended bots, specifically, is among the more complex tasks and is made more effective and streamlined by a centralized platform. As the bots are spread across employee desktops enterprise-wide, there can be tens of thousands of them on thousands of workstations with varying profiles.

Taking the unified framework further, it is advisable to establish a comprehensive suite of all the key automation elements: bots (both RPA and RDA), a design tool, the control room, an automation server, task mining and desktop analytics. The suite provides significant advantages for intuitive integration, user training, development, and scalability for all its components, supporting the most complex deployments from a single platform. There is a notable cost savings in consolidating all the automation capabilities, as opposed to obtaining them from multiple vendors.

Value and Scale: Attended Automation is a Game Changer

As advanced as robotic automation is, humans are not going anywhere. The next step in RPA evolution is the augmentation of human potential, initiative, and creativity with attended automation – on an unprecedented scale.

Productivity improves, as employees get more done when robots take over routine tasks and processes. Less time is wasted, and data capture errors are minimized. Attended automation takes this to the next level, with real-time assistance that helps employees to engage with their customers more effectively.

The result is increased employee satisfaction, as they can focus on aspects of their work requiring judgment, empathy, and consulting expertise. The customer, in turn, enjoys more personalized service and has an elevated experience throughout their journey.