

# Automate Daily Tasks with Robotic Process Automation



# Common Daily Tasks:

- Extract and enter data from forms
- Credit Application
- Logging in to multiple systems
- Fraud reporting
- Downloading reports from websites
- Change of passwords
- Certification processes for specific industry
- Build your own automation

# By Practitioners, For Practitioners



## Clay Richardson

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Member Since:

2005

Clay Richardson is a Faculty Member of DBizInstitute.org, a Digital Business Professional (DBIZP) and the co-founder of Digital FastForward. He has spent most of his career helping leaders build and execute strategies around new disruptive technologies.

Formerly with Forrester Research, a leading market research firm, Clay oversaw research and client advisory projects focused on digital innovation, digital automation, design thinking, and lean startup practices. Clay is a frequent keynote speaker at digital innovation events and conferences.

# By Practitioners, For Practitioners



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Cornelius Pone is a Faculty Member of DBizInstitute.org, a Digital Business Professional (DBIZP) and Co-founder of Digital FastForward, focusing on helping clients apply creative thinking to complex technology challenges.

Focused in the emerging technologies, including robotic automation, machine learning, internet-of-things, and responsive-web development.

Member Since:

2017

# What is Robotic Process Automation?

Robotic process automation (RPA) is the application of technology that automates workflows of administrative tasks and processes, leveraging artificial intelligence and machine learning to complete and manage more complex work and tasks.

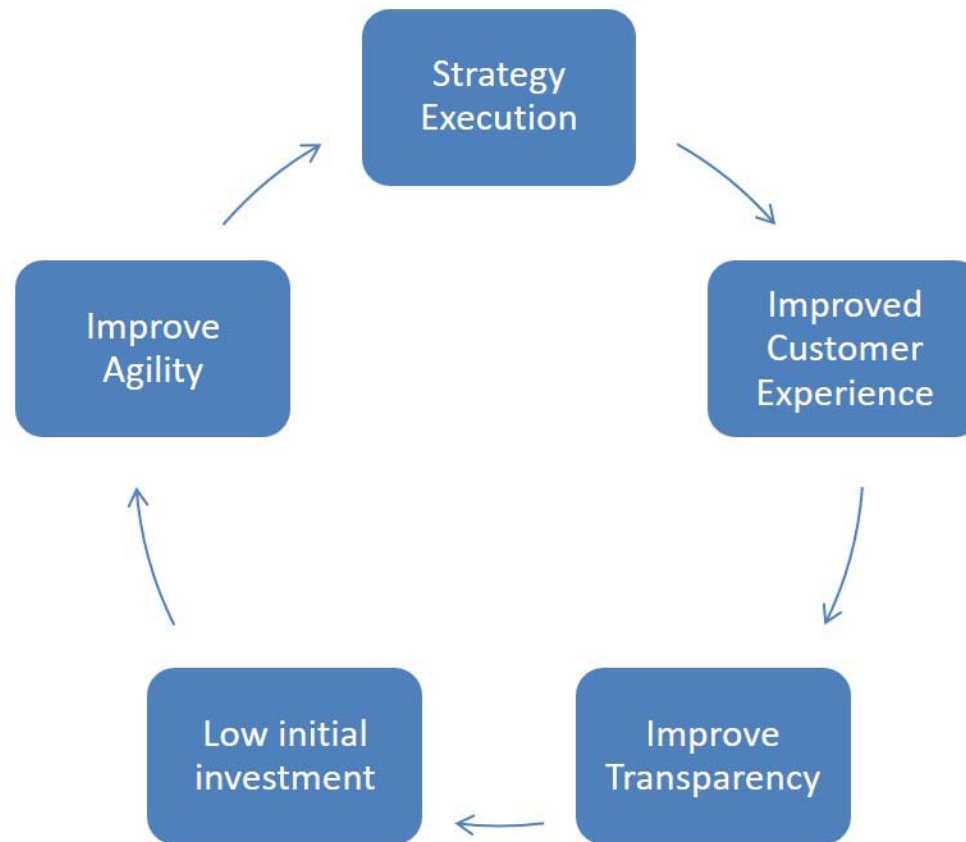


# How it Helps / Benefits

Implementing Robotic Automations into the daily workflow helps:

- Reduce risk
- Increase compliance
- Reduce errors and rework
- Reduce redundancy and variability
- Reduce amount of training and retraining

# Value Proposition



# Use Cases

- Logging In To Multiple Systems
- Download Website Reports
- Extract & Enter Data From Forms



# Logging In To Multiple Systems

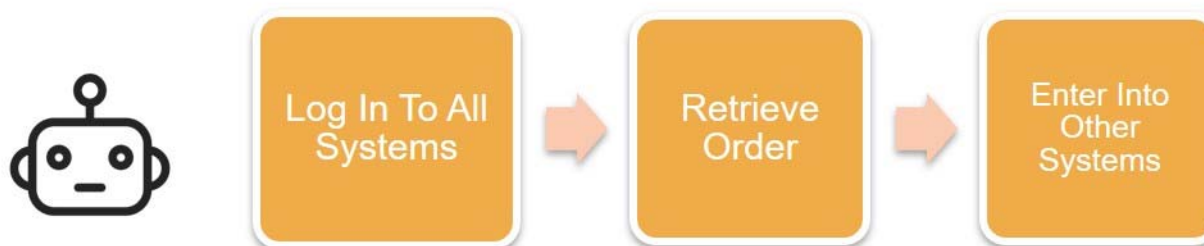
- Challenges:
  - Call center agent needs to login to multiple systems to begin work each day.
  - It's a time consuming task
- Solution:
  - Automate filling in data to save time and eliminate errors

# Logging In To Multiple Systems

## Before



## After



# Download Website Reports

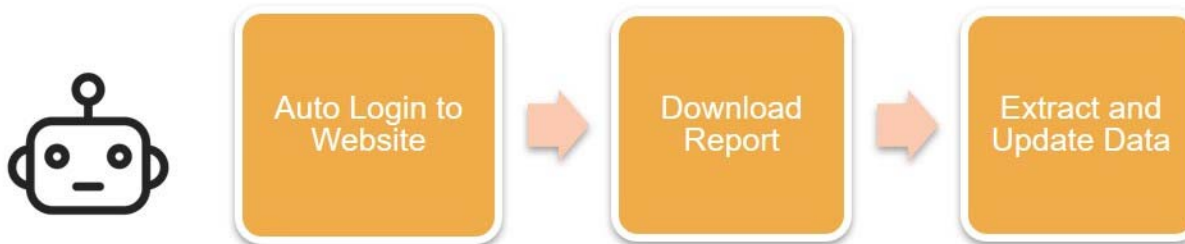
- Challenges:
  - Accounting staff needs to log in to hundreds of websites on a daily basis
  - Need to download financial reports from each website
  - Takes 2 – 3 hours each day to download
- Solution:
  - Automate logging in to website and download reports

# Download Website Reports

## Before



## After



# Extract & Enter Data From Forms

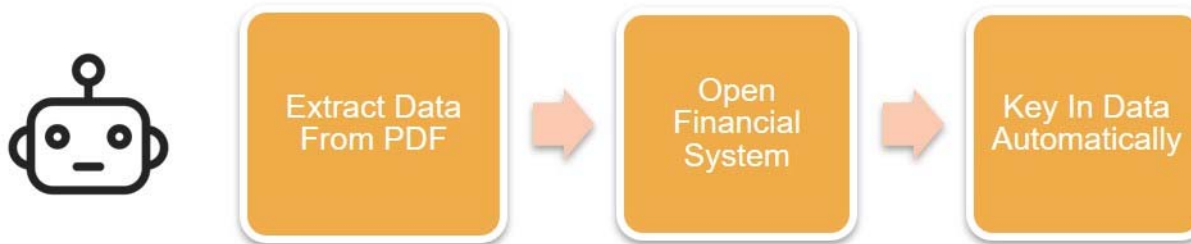
- Challenges:
  - Need to retrieve data from PDF forms and enter into source system
  - It's a time consuming task, and potential for data entry errors
- Solution:
  - Automate filling in data to save time and eliminate errors

# Extract & Enter Data From Forms

## Before

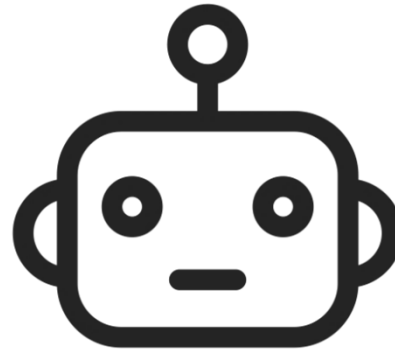


## After





# Learn to build your own bots



# Robotic Processing Automation (RPA)

- Our RPA course will teach you to do the following:
  - Understand RPA and RDA
  - Use cases for RPA/RDA and how they fit with Artificial Intelligence and Digital Technologies
  - Design for customer and user engagements
  - Security and Governance for Bots
  - Where and when to deploy RPA
  - Create your own Bot



# Digital Business Learning Path





## Comprehensive Curriculum

- **Core Courses**

- DBiz101: Introduction to Digital Business
- Design Thinking Applied
- Robotic Process Automation
- Digital Customer Experience

- **Recommended Electives**

- Agile Business Analysis 101
- Process Modeling Analysis and Design
- Advanced Facilitation Skills
- Organizational Change Management

	DBInstitute.org <sup>®</sup>	BPMInstitute.org <sup>®</sup>					BAInstitute.org <sup>®</sup>
	Digital Business	Agile Business Analysts	Business Process Analysts	Business Process Management	Digital Decisioning and Analytics	Operational Excellence: LSS + BPM	Business Architecture
<b>RECOMMENDED CORE</b>	Digital Business 101	BPM 101					BA 101
	Design Thinking Applied	Process Modeling, Analysis and Design: As Is, To Be				OpEx: 101	Building a Business Architecture: Part 1
	Robotic Process Automation (RPA)	Process Measurement and Metrics				Lean Six Sigma and BPM	Building a Business Architecture: Part 2
	Digital Customer Experience	Establishing Business Process Governance & Centers of Excellence				Lean Tools in Action	Launching Your Business Architecture Practice
	Digital Business	Agile Business Analysts	Business Process Analysts	Business Process Management	Digital Decisioning and Analytics	Operational Excellence: LSS + BPM	Business Architecture
<b>RECOMMENDED ELECTIVES</b>	Process Modeling, Analysis and Design: As Is, To Be	Agile Business Analysts 101	Methodologies and Approaches for BPM	Customer Experience Modeling, Analysis and Design	Decision Management and Business Rules 101	Process Modeling, Analysis and Design: As Is, To Be	Establishing Business Architecture Governance and Centers of Excellence
	Agile Business Analysts 101	The Agile Business Analyst	Advanced Facilitation Skills	Organizational Change Management	Improving Decisions with Predictive Analytics	Process Measurement and Metrics	The Business Architecture Playbook
	Advanced Facilitation Skills	The Practice of Agile Business Analysts: Part 1	Process Modeling With BPMN: Part 1	Process Modeling With BPMN: Part 1	Process Modeling With BPMN: Part 1	OpEx: Tools of the Trade	Business Architecture / IT Architecture Alignment
	Organizational Change Management	The Practice of Agile Business Analysts: Part 2	Process Modeling With BPMN: Part 2	Process Modeling With BPMN: Part 2	Decision Modeling With DMN	Organizational Change Management	Organizational Change Management
<b>CERTIFICATES</b>							

# Digital Business Certificate Program

## DBIZP<sup>SM</sup> Certificate of Training Program

- **8-Course, 16-credit program**
  - Recommended Core courses
  - Recommended Elective courses
  - Customize Your Learning Path
- **Flexible Delivery Methods**
  - Face To Face
  - In-House
  - Live Online
  - On-Demand
- **DBiz Practice Areas**
  - Provides coverage of all critical knowledge areas



# Expanded Certificate Program



- Digital Business
- Business Architecture
- Business Process Management
- Agile Business Analysis
- OPEX: LSS+BPM
- Digital Decisioning and Analytics

# Flexible Delivery Methods

## On Demand



**Complete your BPM Certificate 100% online**  
Choose from our most popular On Demand courses available 24/7/365 from your PC, phone or tablet.

## Live Online Package



**Instructor-Led Online Courses**  
Live online courses allow you to interact with instructors and fellow students. You may also choose to take On Demand courses.

## Face-to-Face Events



**Our most flexible package**  
Register for any delivery method you wish. Attend any of our face-to-face events as well as register for eLearning courses as it fits your schedule.

## Group Training



**Customized Training for Your Team**  
Group Training available both In-House and Online. Known for our customization capabilities, each course customized for your needs.

# NEW: Virtual Training



# Visit Digital Business Institute

**DBizInstitute.org**  
The Peer-to-Peer Exchange for Digital Business Professionals

## Digital Transformation

We provide the knowledge transfer and skills development you need to succeed in the digital market place.

- Earn Your Certificate**  
Studies show certificate holders earn 20% more.
- Custom Training tailored to your group's needs**  
Customized to your industry, company, roles and projects.
- On-Demand Certificate Package**  
Complete your BPM Certificate 100% online 24/7/365 from your PC, phone or tablet.
- eLearning Certificate Package**  
Attend Live Online courses - interact with instructors and fellow students.
- Face-to-Face Certificate Package**  
Our most flexible package allows you to register for any delivery method you wish.

# Next Steps

## Join DBizInstitute.org

- Existing Members: Add Digital Business to your subscription preferences

## Attend Digital Business Training

- Face To Face or Virtual
  - **New York City: November**
  - Chicago: April 2019
  - San Francisco: June 2019
  - Washington, DC: September 2019
- Live Online Training
  - **Q4 2018 Session starts in November**

## Earn Your Digital Business Certificate

# Complimentary Consultation

- View the Interactive Learning Paths Online
- Call for a consultation
- Key Contacts:
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Phone: 508-475-0475, ext. 10  
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Phone: 508-475-0475, ext. 15  
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