



PA
TEAM

NICE

The Importance of Desktop Process Mining for the Success of RPA in Your Organization

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Who We Are



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agenda

- The challenge behind process automation
- Process Mining vs Desktop Process Mining (aka Task Mining)
- A practical use case
- Q&A

Thousands of Processes Across the Enterprise



HR

- New joiners and leavers
- Payroll variation checking



Procurement

- Invoice processing
- PO processing
- Inventory management



Contact Centers

- Customer data management
- Contact processing



F&A

- GL & reporting
- AR & cash management
- AP & expense reporting



Industry Specific

- Claims processing
- Policy servicing and reporting
- Card activation
- Fraud claims discovery

Huge Variation in Processes

Handle Time

Short



Long

Complexity

Simple



Complex

Frequency

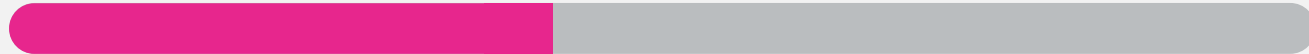
Rare



Frequent

Importance

Trivial



Significant

Variance

Seasonal



Evenly distributed

Error-Prone

Low



High

'THE' Question Enterprises ask

Where do I start?



#1 Success factor

automation project success is
driven from selecting the right
processes to automate



Process Mining



Master Chef

Desktop Process Mining



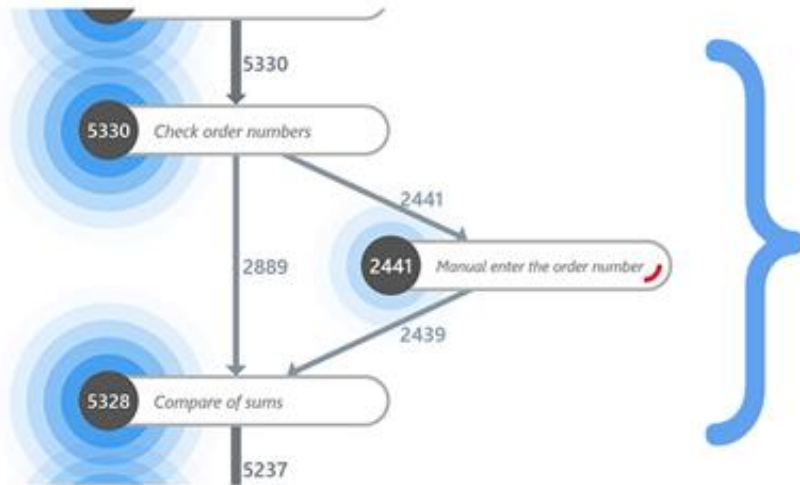
Hell's Kitchen

Automation Discovery vs Process Analysis

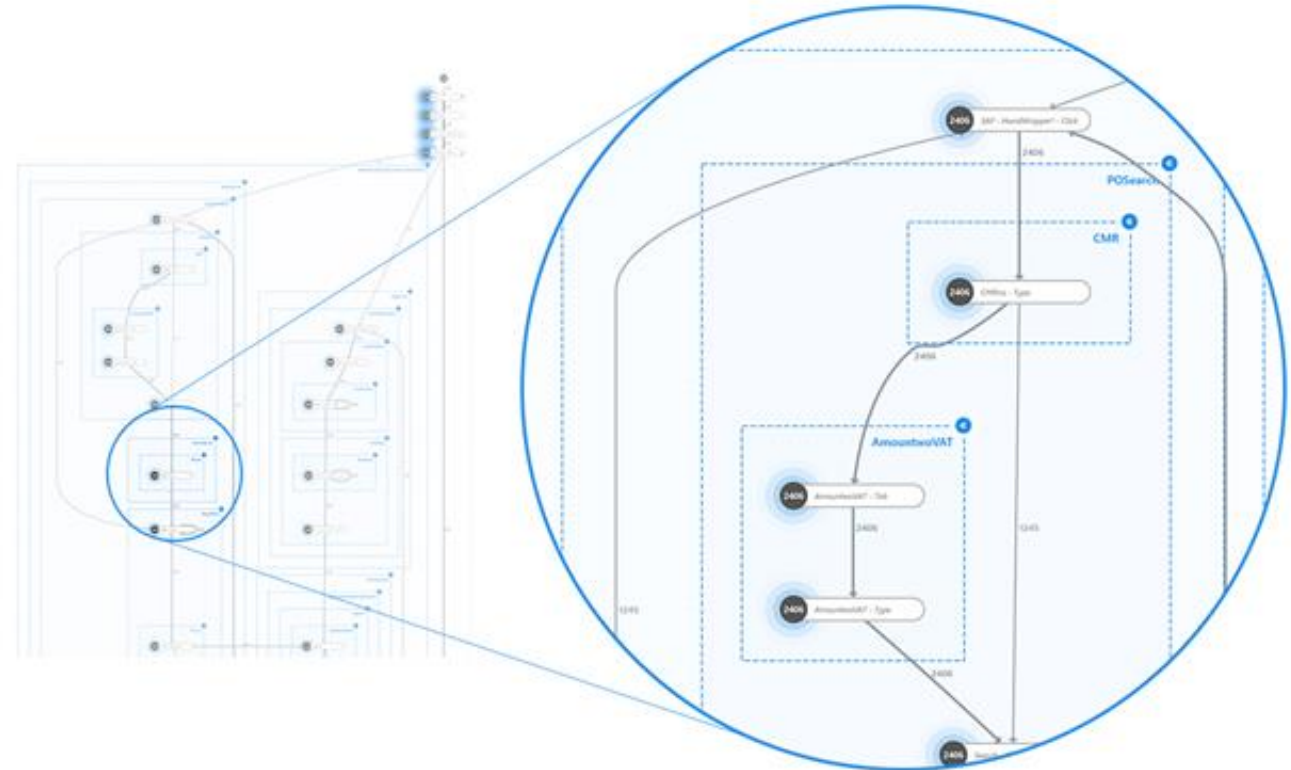
	Desktop Process Mining/Task Mining	Process Mining
Value Prop	Discover actionable automation opportunities	Analyze a specific process
Business Challenge	Open Question: 'What should we automate?'	Specific Question: 'How can we improve a specific business process?'
Relevant Market	Plug and play - Any organization who wish to start or boost automation journey	Organizations who can supply 3rd party event logs and describe the process in details

Best When Combined

Process Mining



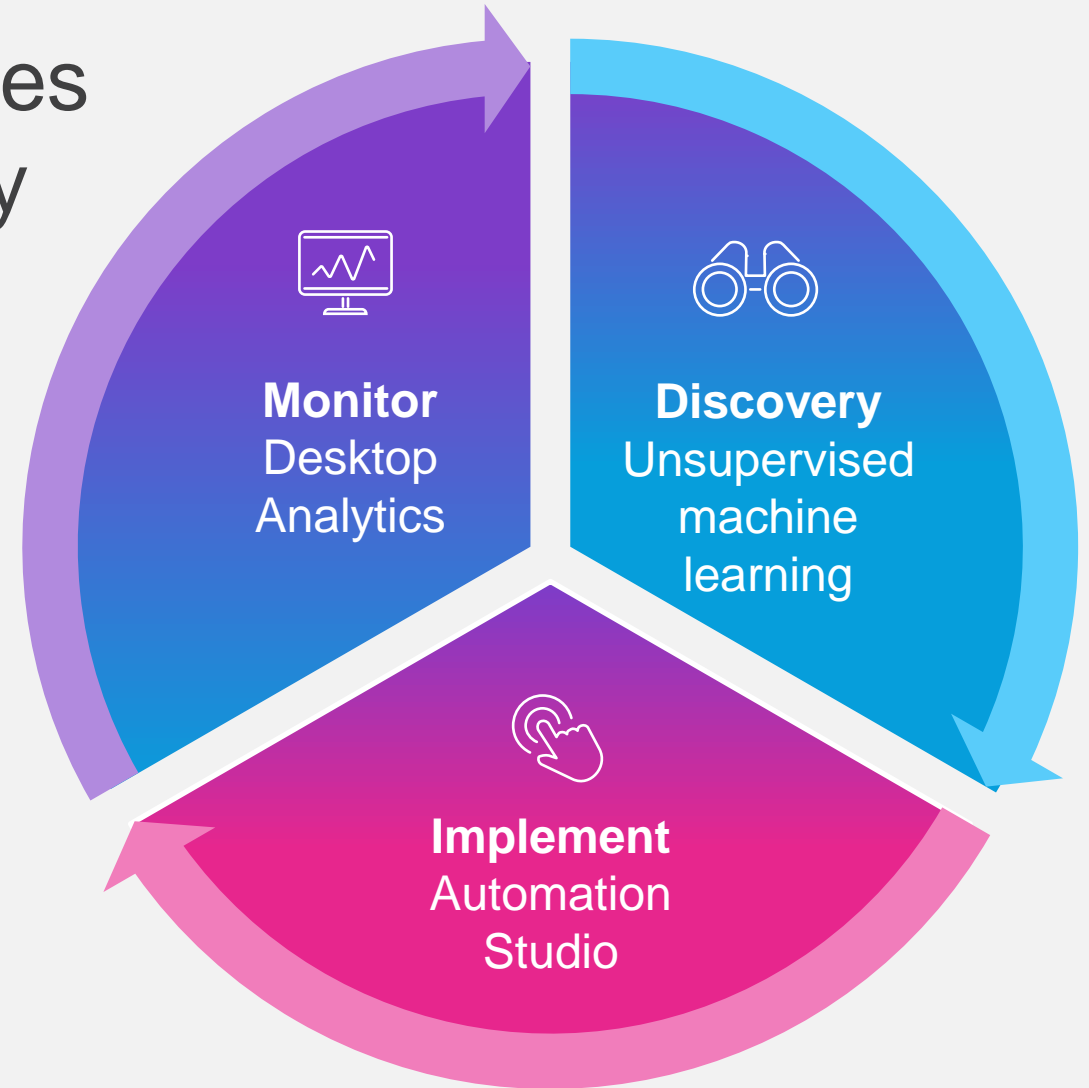
Desktop Process Mining / Task Mining



NICE Automation Finder Provides Intelligent Automation Discovery

Identification of processes with the highest ROI potential for automation based on:

- Frequency
- Process handle time
- Type of manual actions



AI- Based Discovery of New Processes to Automate

Automation Finder leverages unsupervised machine learning to identify more automation candidates

AUTOMATION PORTAL

Thomas Brown (User)

NICE

Automation Insights

TEAMS

Not Specified

Add / Remove

APPS USED

Not Specified

Add / Remove

Clear

Clear

SUMMARY

36 USERS

1 TEAMS

3,103,177 ACTIONS

JAN 1, 2020 – JAN 14, 2020

VIEW BY:

PROCESSES

ROUTINES

Showing 1 - 5 of 5 Processes

Search

PROCESS NAME	SCORE	TOTAL TIME	APPLICATIONS	UNIQUE USERS	# ROUTINES
Quote to Order Entry	82	361:12:32	Excel, Salesforce, Outlook, FairBilling, Oracle	27	10
Modify Credit Limit	79	324:15:09	Excel, FairBilling, Word, Oracle	25	9
Billing Cycle Update	61	289:27:43	FairBilling, Excel, Outlook, Stiky Notes	28	17
Get Policy Coverages	53	256:21:56	FairCRM, Notepad	21	8
Ship to Receive	37	196:02:25	FairPortal, Outlook, Word	22	7

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8 ITEMS PER PAGE

1 - 5 OF 175 ITEMS

Create New Automation Flows in a Click & Shorten Time To Automation Development

Automation Finder

AUTOMATION PORTAL Thomas Brown (User) **NICE**

Reports Portal > Copy/Paste Excel into Contact Edit ~ Salesforce >

Awiliams - 19/01/19 3:09 PM

Create Automation

ACTION	START TIME	ACTION COMPONENT	WINDOW
Left Click	19/01/19 03:09:34	New Customer Mailing Addresses	New Customer Mailing Addr
Keyboard Input [Ctrl-C]	19/01/19 03:09:35	D31	New Customer Mailing Addr
Left Click	19/01/19 03:09:39	Contact Edit ~ Salesforce	Contact Edit ~ Salesforce
Keyboard Input [Ctrl-V]	19/01/19 03:09:40	MailingStreet	Contact Edit ~ Salesforce
Keyboard Input [Ctrl-C]	19/01/19 03:09:44	E31	New Customer Mailing Addr
Keyboard Input [Ctrl-V]	19/01/19 03:09:47	MailingCity	Contact Edit ~ Salesforce
Keyboard Input [Ctrl-C]	19/01/19 03:09:49	F31	New Customer Mailing Addr
Keyboard Input [Ctrl-V]	19/01/19 03:09:55	MailingState	Contact Edit ~ Salesforce
Keyboard Input [Ctrl-C]	19/01/19 03:09:59	G31	New Customer Mailing Addr
Keyboard Input [Ctrl-V]	19/01/19 03:10:02	MailingCountry	Contact Edit ~ Salesforce
Keyboard Input [Ctrl-C]	19/01/19 03:10:04	H31	New Customer Mailing Addr
Keyboard Input [Ctrl-V]	19/01/19 03:10:07	MailingCountry	Contact Edit ~ Salesforce

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Automation Studio

AUTOMATION STUDIO BETA YB Yaron Bialy **NICE** inCo

Excel into Salesforce

OBJECTS WORKFLOWS

STEPS ASSETS

Search for...

Excel into Con...

Start → Open Excel → Read Address Data → Open Salesforce → Go to 'Edit Contact' → Fill Address → End

Assign Mailing Street
fx Assign Mailing Street into Value of First Name

Assign Mailing City
fx Assign Mailing City into Value of Last Name

Assign Mailing Zip
fx Assign Mailing Zip into Value of Company

Assign Mailing State
fx Assign Mailing State into Value of Mailing State

Assign Mailing Country
fx Assign Mailing Country into Value of Email



Automation Finder in practice

The Challenge



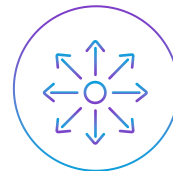
A large global logistics company.



Uses several RPA tools as well as NEVA for several years.

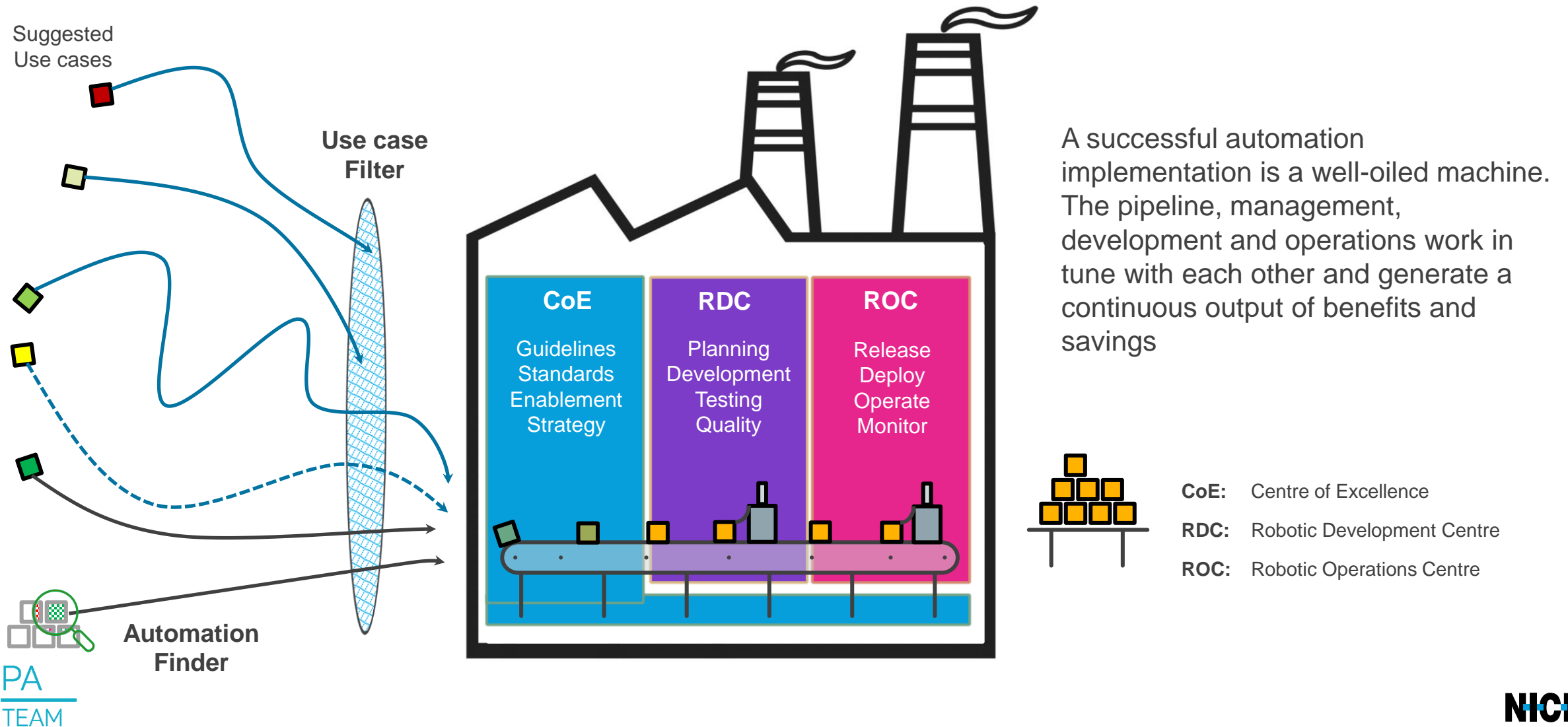


COVID-19 accelerated work-from-home and the need for digitalization.



Automation pipeline generation also needed a revisit.

The Road to Success: Automation Factory



The Goals of Automation Finder

Pipeline

- Build a pipeline for after the initial automations

Compare

- Find potential differences between teams/units across countries

Monitor

- Monitor the impact of automation/solutions on processes

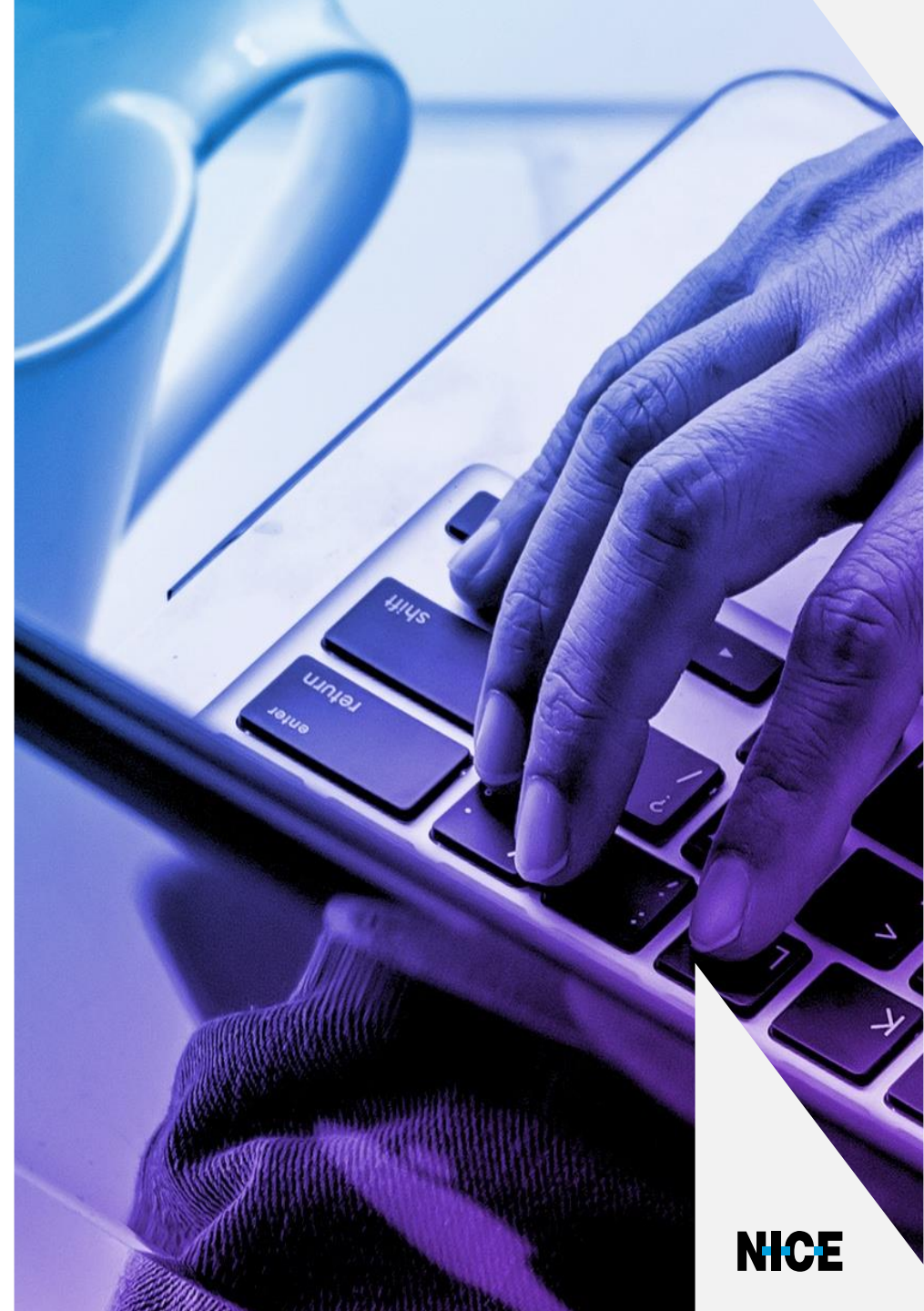
The Approach

Step 1

- We started with a production pilot
- Both IT and business involved
- Analyzed the results and found initial use cases.

Step 2

- Rollout to more sites and countries (200 users)
- Train business on how to analyze
- Enable CoE on pipeline management

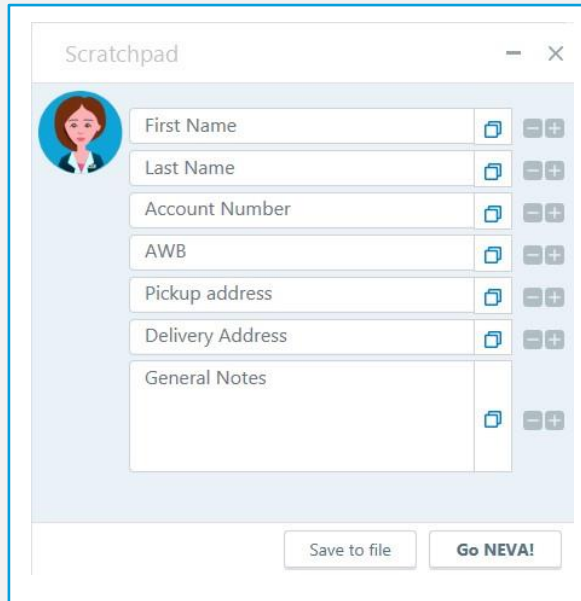


Initial Outcomes

Several use cases were found in the initial runs, highlighting two findings:

Call Notes

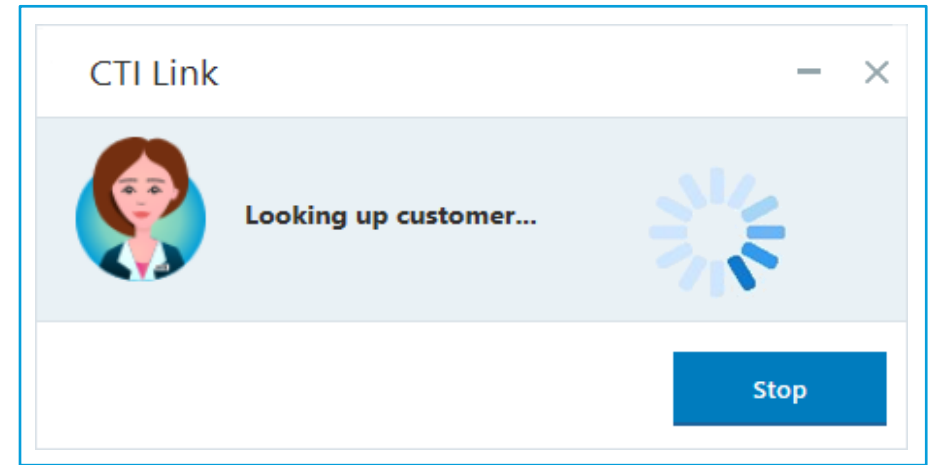
- As a call starts, NEVA provides a notepad area.
- The agent uses it to take call notes
- Once call ends the agent saves the notes or automate the after-call-work using NEVA.



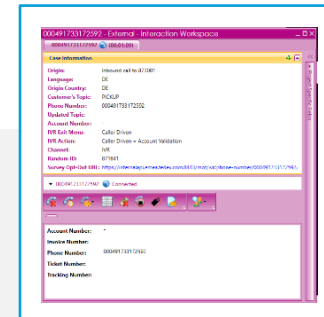
The screenshot shows a window titled "Scratchpad" with a list of input fields for call information: First Name, Last Name, Account Number, AWB, Pickup address, Delivery Address, and General Notes. Each field has a copy icon and expand/collapse controls. At the bottom, there are "Save to file" and "Go NEVA!" buttons.

CTI Link

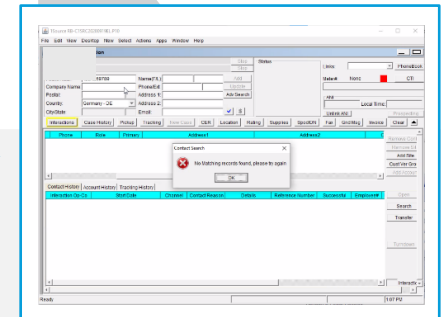
- NEVA recognizes a new call and populates caller details in the CRM



The screenshot shows a window titled "CTI Link" with a loading spinner and the text "Looking up customer...". A "Stop" button is visible at the bottom right.



The screenshot shows the NEVA interface with a list of call details including Origin, Language, Origin Country, Customer's Topic, Phone Number, Standard Topic, Account Number, RTR Bill Message, RTR Action, Channel, Replication ID, and Source. A "Go NEVA!" button is visible at the bottom.



The screenshot shows the CRM interface with a contact search result. The contact details are displayed, including Name, Address, and Phone Number. A "Contact Search" dialog box is open, showing a message: "No matching records found, please to open".

What's next?



Continuing Automation Factory set-up



Automation Finder now is part of the toolbox



Identify, and build new automations found



Roll-out automations to entire agent population

Getting Started with Automation Discovery



1 Select **20-25 Users** from same team



2 **Install** the RPA client on user desktops and collect data for 2-3 weeks



3 **Analysis**
Collected data is uploaded to the AI Server for analysis



4 **Viewable Results** In Automation Finder Portal + short review session with SME

3 Key Takeaways

- Selecting processes for automation should be a fact-based exercise
- Desktop Process Mining/Task Mining is there to answer '*what should we automate*' while traditional Process Mining will help to *analyze* your processes
- DPM is an ongoing practice, allowing you to grow your automation footprint – for both unattended as well as desktop automations

Next Steps

Talk to us:

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Get more info:

www.nice.com/rpa/automation-finder

<https://www.rpatoday.net/nice/>



Thank You

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