

Building and Scaling Robots that Deliver Impact: The Leap From RPA to Digital Process Automation

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Pegasystems

PW 18



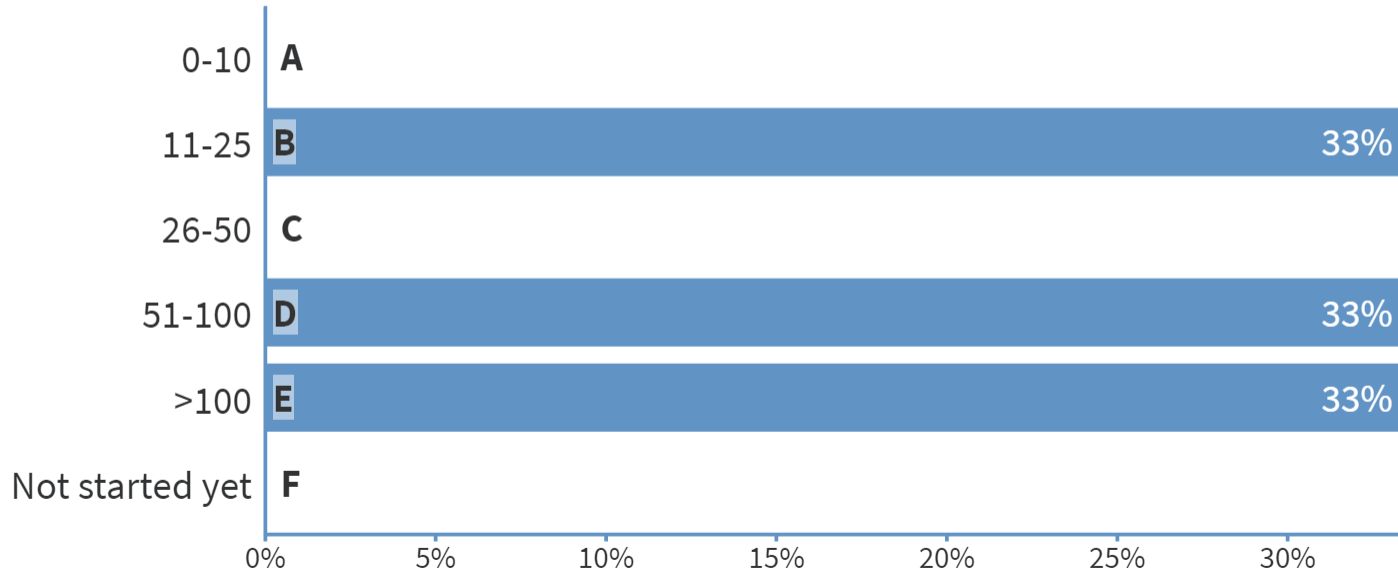
**Limitless possibilities.
Real results.**

Audience Participation Question

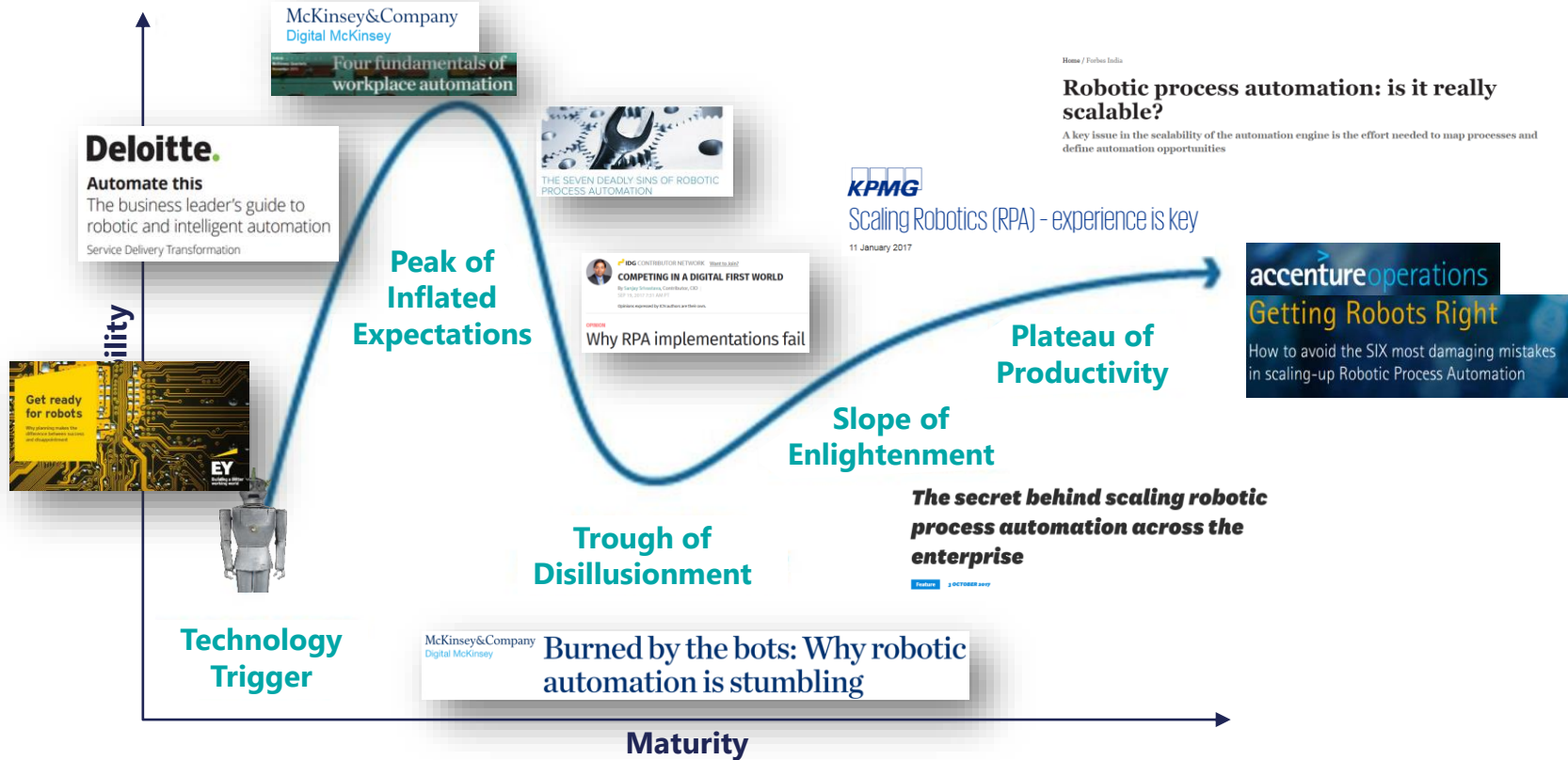
How many bots are deployed within your organization

Respond at [PollEv.com/scottmerritt010](https://poll-ev.com/scottmerritt010)

Text **SCOTTMERRITT010** to **22333** once to join, then **A, B, C, D, E...**



RPA Hype Cycle... Where Are We Now? Are We Scaling?



Is RPA Scaling?

77%

1-10 bots Deployed

IAFS benchmarking report 2018

78%

< 50 bots Deployed

2018 HfS Research



Al Ochoa, Senior Advisor, Digital Labor – Southern California Edison

Company Highlights

SCE is one of the largest electric utilities in the United States and a longtime leader in renewable energy and energy efficiency. With headquarters in Rosemead, Calif., SCE serves approximately 5 million customers in a 50,000 square-mile area of central, coastal and Southern California.

Robotics Engagement Overview

- **When your journey began:** 2015
- **Automation Products Deployed:** RPA, RDA, OCR, ICR Pilot
- **Application integrations:** 15
- **Delivery type** Operational Driven currently running agile process
- **Key benefits:** Cost, Quality, reduced training effort, reduction in safety incidents standardization



Team / COP Makeup

- COP consists of Operations skilled employees and technically skilled developers
- Team supports Customer Service Organization which consists of the Billing Org, Call Center, Customer Product and Services
- The SCE Digital Labor Team owns overall RPA and RDA responsibility for Customer Service,

#1 Piece of Advice for Someone on This Robotics Journey

“Focus on high repetitive work first and leave the complex decision making to your employees.”
“This is less threatening and helps change culture in the Org”

Tali Zidon, Global Head – Advanced Automation, Morgan Stanley

Company Highlights

- Morgan Stanley (NYSE: MS) is a leading global financial services Firm providing investment banking, securities, wealth management and investment management services. With offices in more than 41 countries, the Firm's employees serve clients worldwide including corporations, governments, institutions and individuals.
- Tali Zidon is an Executive Director at Morgan Stanley based in New York and Global Head of Advanced Automation for Operations, responsible for Automation including Robotics, Workflow Orchestration and other Strategic Programs.



Robotics Engagement Overview

- **When your journey began:** Mid-2017
- **Automation Products Deployed:** Pega Robotics
- **Application integrations:** A handful in production, multiple in the pipeline
- **Delivery type** Ops Driven, Agile, RPA, Other Automation tools
- **Key benefits:** Headcount reduction, risk reduction

Team / COP Makeup

AvA CoE Defines, Provides and Advises on:

- Strategic Vision and Approach
- Governance Guidelines and Implementation Standards
- Training and Education
- Best Practices around automation tools and technologies
- Architectural standards
- Infrastructure management utilities
- Centralized IT Services, Common Reusable Components
- Implementation partner management & support

#1 Piece of Advice for Someone on This Robotics Journey

“Ensure you understand the capabilities, select the right use case(s), and properly think through your infrastructure before implementing”

Rakesh Padmanabhan, Head of Technology – Robotics, Workflow, and AI ANZ Bank

Company Highlights

- ANZ is one of the 5 largest listed companies in Australia and number one in New Zealand
- ANZ's market capitalization is AU \$93.4 billion
- ANZ operates in 34 markets with ~46,000 employees
- ANZ serve retail, commercial and institutional customers through consumer and corporate offerings

Robotics Engagement Overview

- **When your journey began:** 2014
- **Automation Products Deployed:** Pega Robotics, Automation Anywhere, and other AI, ML and cognitive tools
- **Delivery type:** Ops/Business and Technology collaborated, Agile, Process improvement and RPA, Distributed and Central
- **Key benefits:** Cost, Quality, error reductions, better staff engagement, faster turnaround and better time to market, standardization



Team / COE Makeup

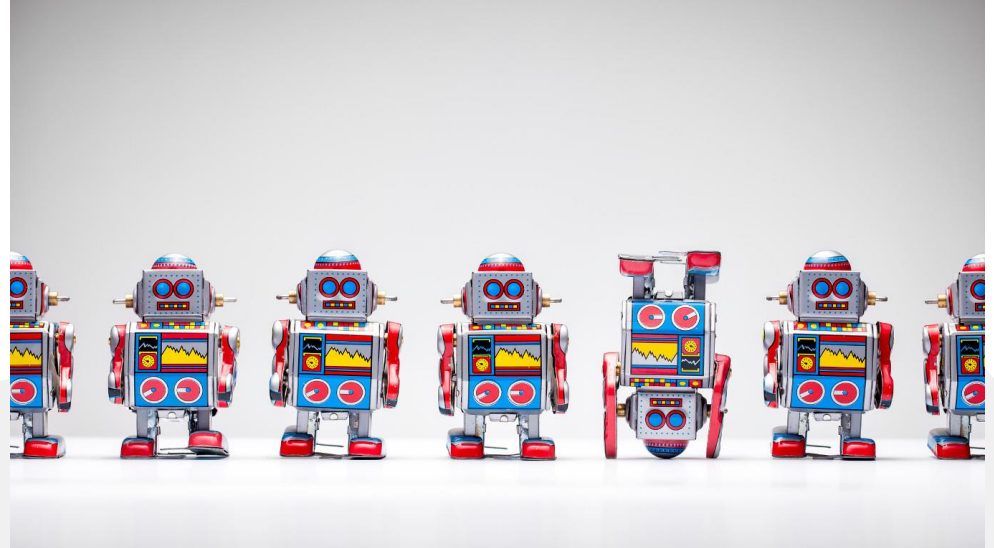
- We are a technology team with majority of our developers having a strong Operations background
- We support both a full service development model as well as a distributed execution model
- Our developers are cross trained on multiple RPA tools
- There is joint ownership between business and technology on benefits realization, execution strategy and governance

#1 Piece of Advice for Someone on This Robotics Journey

"Don't move bottleneck downstream but target to eliminate it with continuous improvement"

Getting Robots Right – Mistakes Impacting Scale

- “Robots are the whole solution”
- “I can do this without involving IT”
- “If I can do one robot, I can do 1,000”
- “Let everyone do their own”
- “Robots are ‘set-and-forget”
- “People strategy can come later”



Source: *Getting Robots Right How to avoid the SIX most damaging mistakes in scaling-up Robotic Process Automation* (Accenture, 2016)

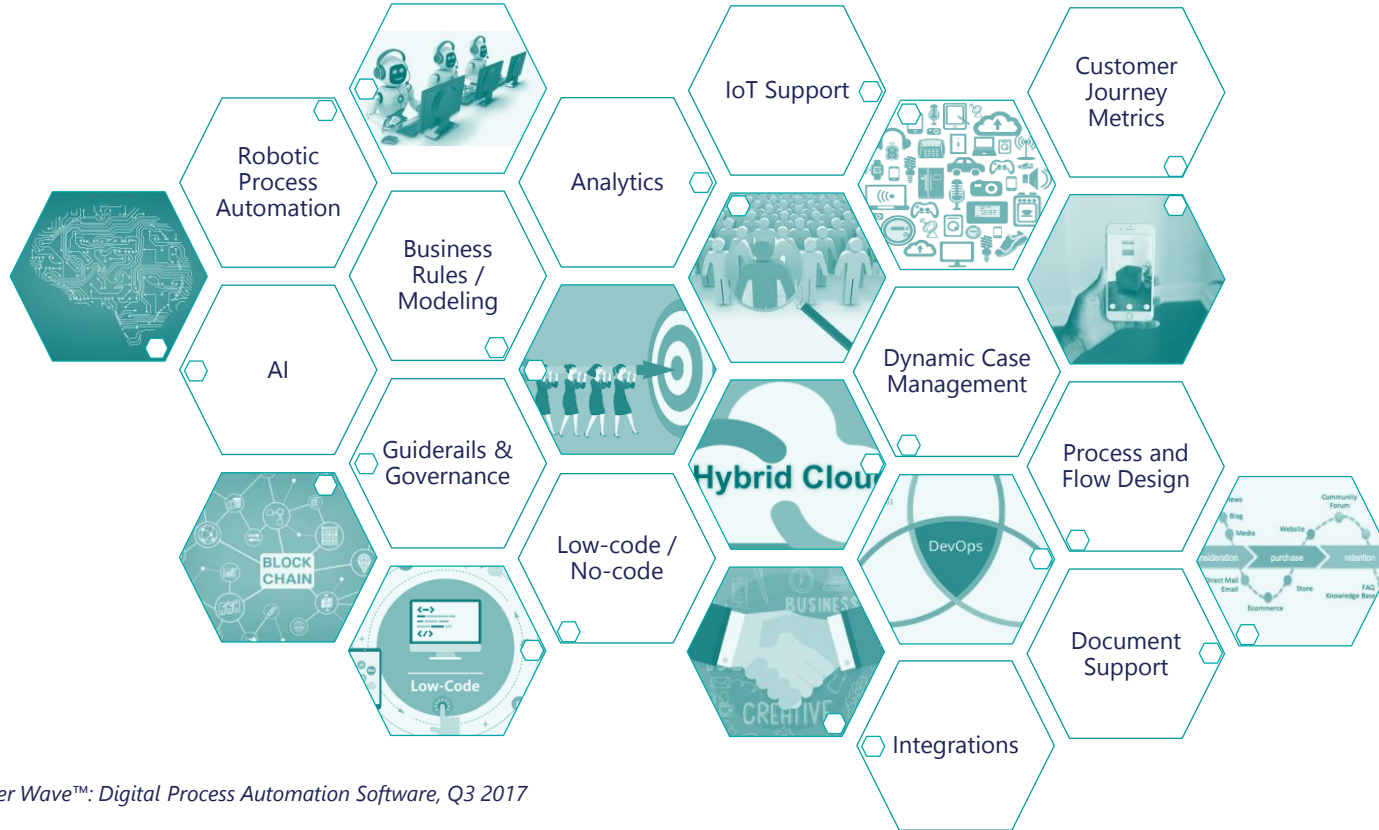
Your Recipe for Digital Automation Success?

“RPA is not substituting one ingredient for another.
It is part of a shift to a whole new recipe.

The most transformative benefits come from mixing the right combination of RPA tools, process engineering and human talent – all within a long-term shift towards superior experience and greater automation.”

Source: *Getting Robots Right How to avoid the SIX most damaging mistakes in scaling-up Robotic Process Automation* (Accenture, 2016)

#DigitalProcessAutomation "DPA"

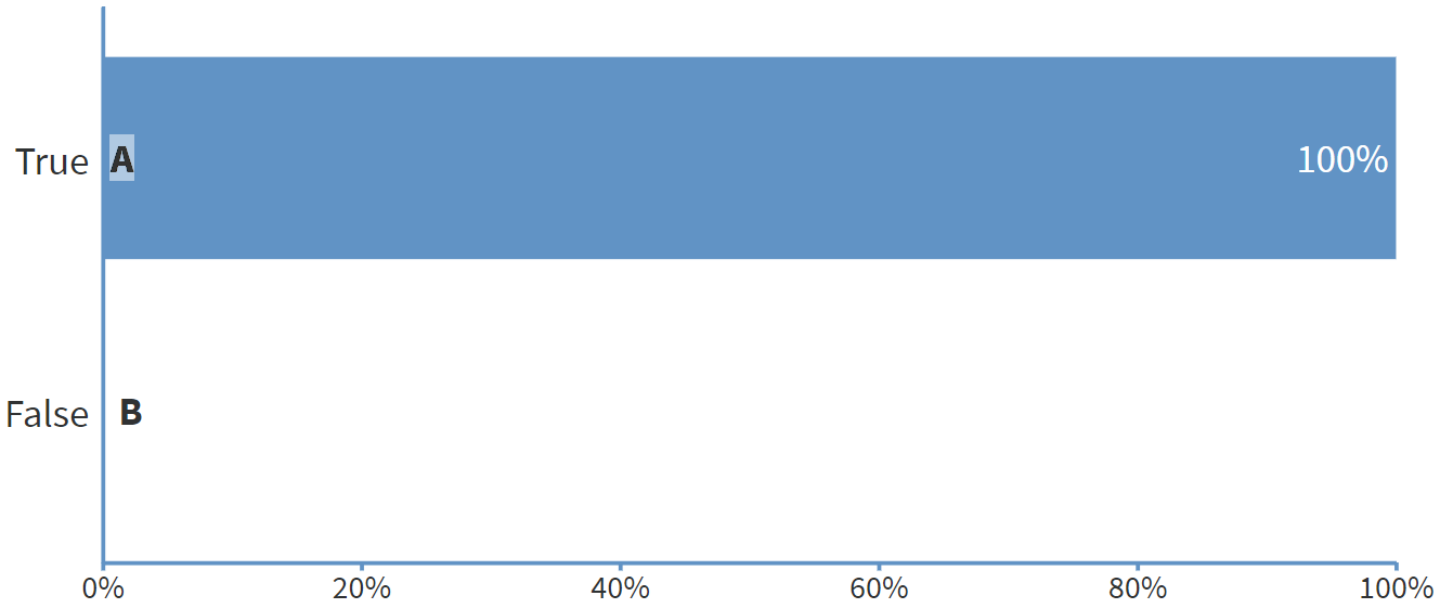


Source: *The Forrester Wave™: Digital Process Automation Software, Q3 2017*

Audience Participation Question

Organizational silos are impacting your ability to drive digital process automation

Respond at PollEv.com/scottmerritt010 Text **SCOTTMERRITT010** to **22333** once to join, then **A or B**



Poll Everywhere

Q&A



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