

ROI and Change Management within Digital Process Automation Journey

Jeff James
VP, Business Excellence

Mark Lown
AVP, Lean Solutions and Business Process Automation
Sun Life Financial



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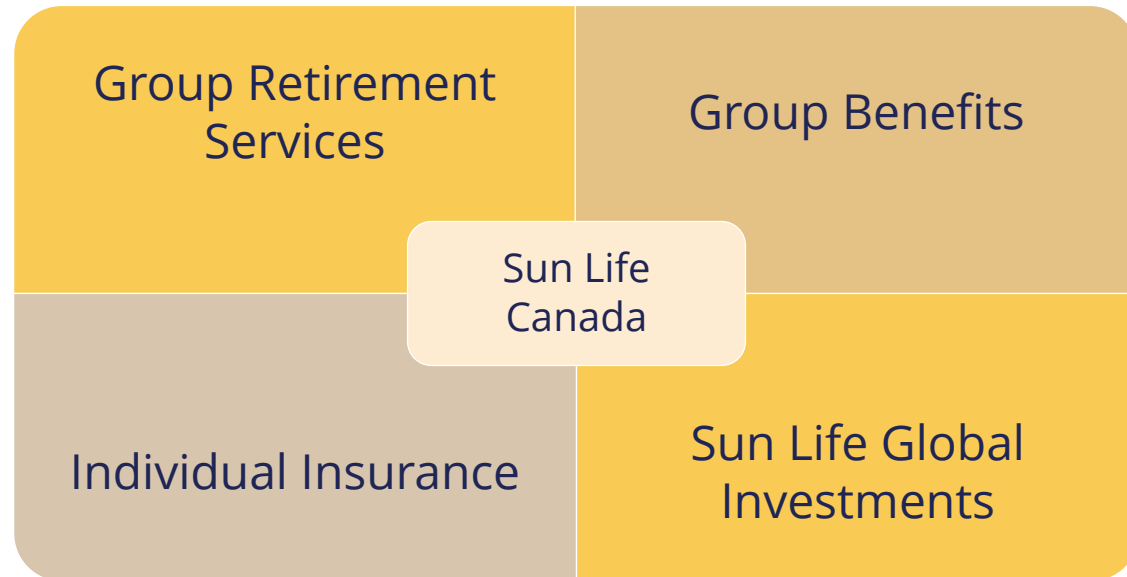
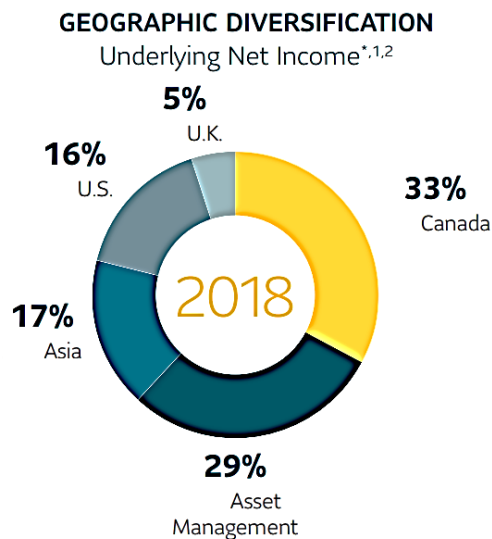
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Sun Life Canada

Sun Life Canada is a leading provider of insurance and wealth solutions in its home market, providing products and services that deliver value to over six million Canadians through our group and individual businesses. We are the largest provider of benefits and pensions in the workplace, and provide a wide range of products to individuals via retail channels.



PEGA Journey

2016: PEGA Proof of Concept

1 simple process; 1 business area, 10 users

- Simple call center automation, focused on proving out technical capabilities and value

2017: PEGA RDA Pilot

2 production automations, 150 users, 1 business area

- Upskilled existing Micro Automation development team, using agile development methodology
- Launched Robotics Centre of Excellence
- Educated Business Units on how to identify opportunities

2018: RDA Full Deployment & DPA Pilot

12 production automations, 1,600 users, 9 business areas

- Scaled to 3 Agile development teams
- Integrated enterprise support
- Continue to cultivate the funnel of automation opportunities
- Launched pilots for PEGA DPA

2019: DPA

20+ production automations, Scaling of PEGA Enterprise DPA

- Scaling of PEGA DPA from pilot to multiple operations
- Continue to leverage RDA

Henry Bot: A Sun Life Success Story

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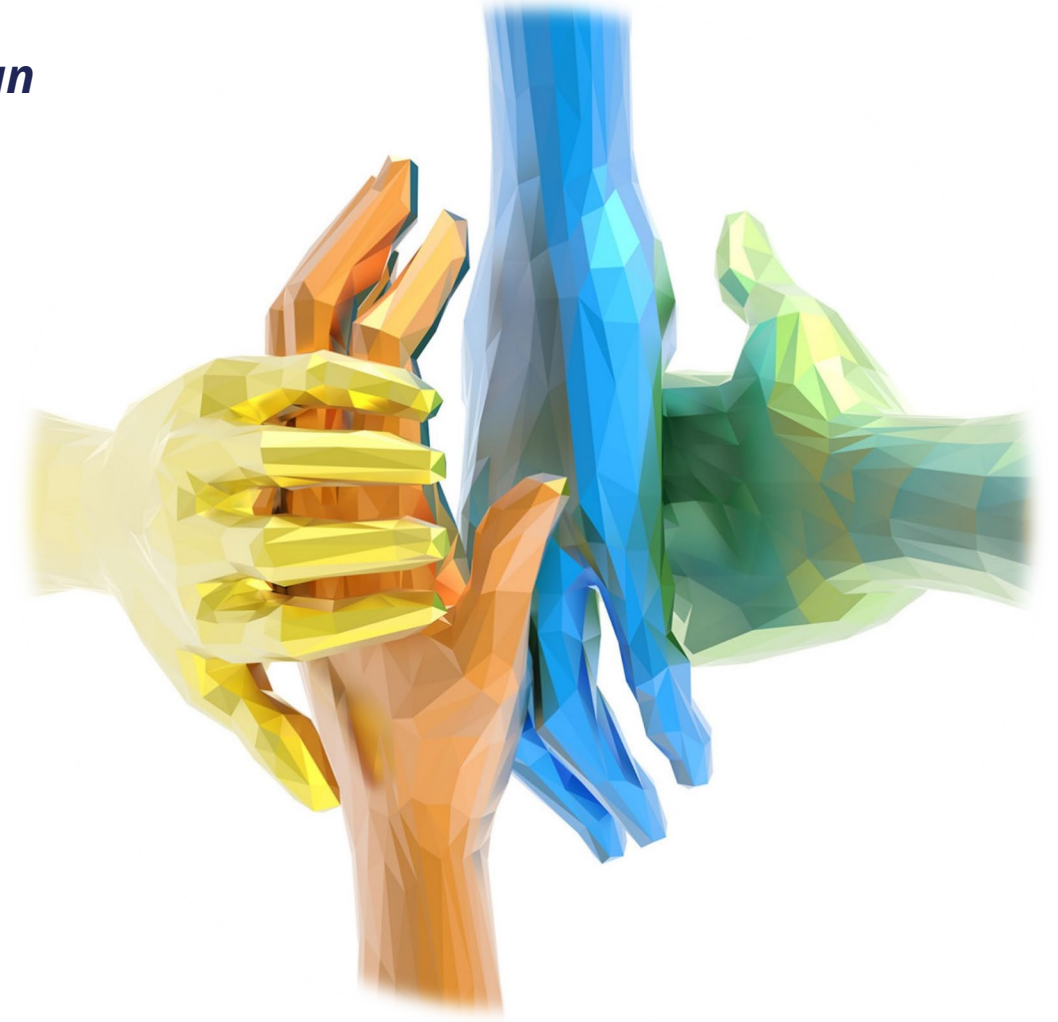


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Change Management

Critical for success of Robotic Automation Program within an organization, like any other initiative

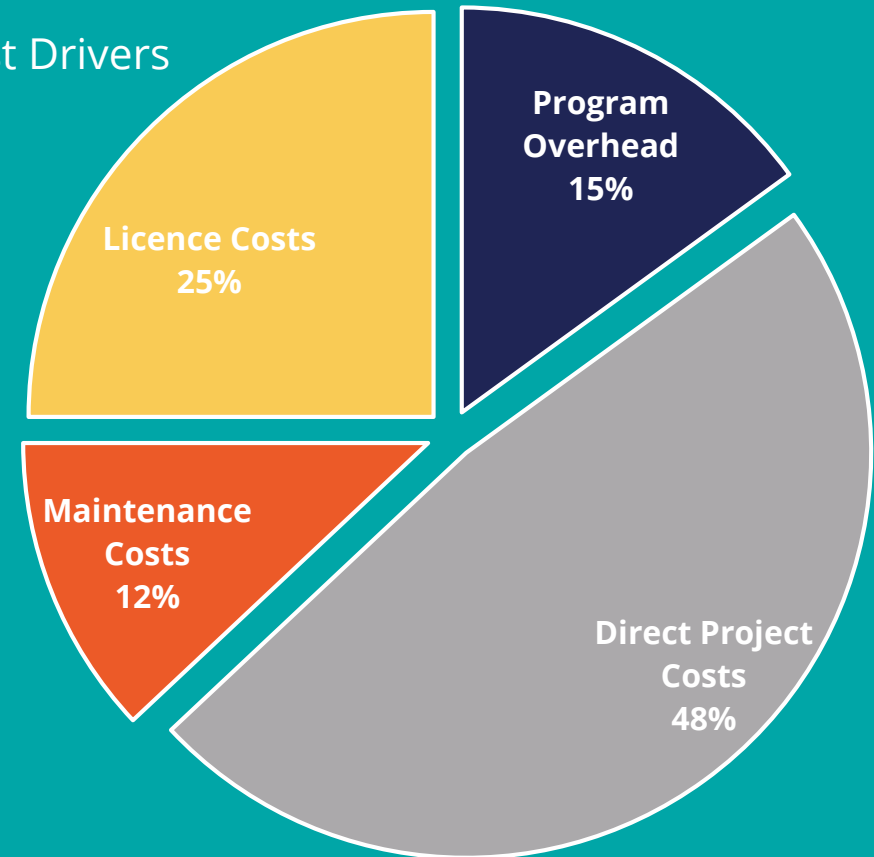
- **Leadership support**
 - Sponsorship & Communication
 - Benefit realization
- **End user buy in very important**
 - Trust the bot
 - Early adopters and process champions
 - Training on new process
- **Support from IT and other enablement team**
 - Business led development while using IT infrastructure
 - Fast paced deployment (Agile vs Waterfall)



ROI Drivers

- Return drivers
 - Eliminating manual effort
 - Improving over 1.4 million client interactions per year (% of volume)
 - Eliminating errors and error handling
 - Improving employee onboarding
- ROI discipline throughout automation lifecycle
 - Target criteria for intake
 - Oversee development & maintenance
 - Measure and improve performance

- Cost Drivers



Return on Investment

Intake & Prioritization

Development & Implementation

Maintenance & Support

Change Management

Intake & Prioritization

Having the discipline to automate the high value opportunities

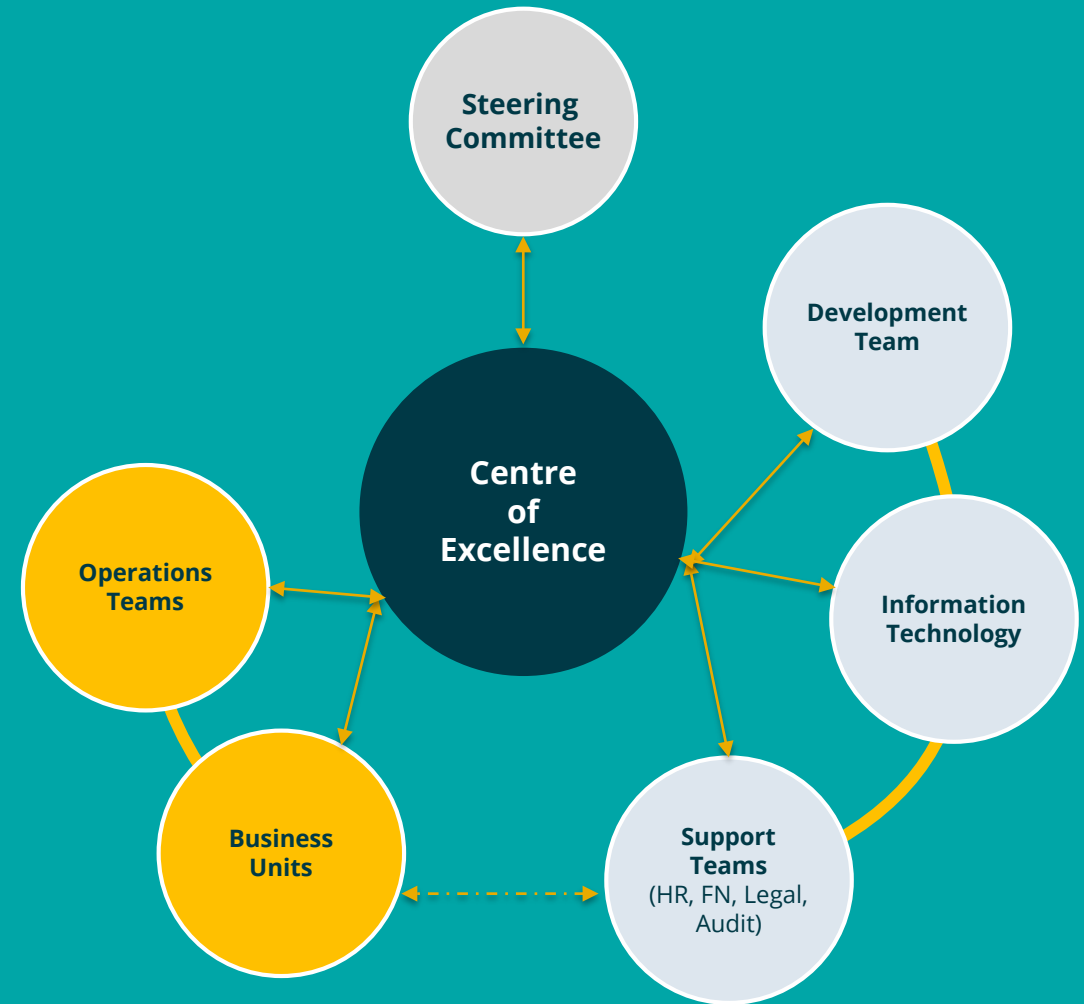
- 6 - 25% of identified opportunities convert to suitable candidates for automation
- Build the capability to evaluate business process and robotic automation as a solution v. process changes, and traditional automation
- Assess holistic benefits and apply a payback hurdle: <1.5 years
- Maintain a pipeline 6-8 months in advance to maximize development utilization



Development & Implementation

Success is maximizing business case value v. 100% automation

- Get the Product Owner thinking about adoption and benefit measurement early
 - Value driven backlog prioritization
- Manage performance drivers e.g. % of sprints where product backlog is completed
- Ensure Change Management activities are happening throughout the development cycles



Maintenance & Support

Work to minimize a stand alone Process Automation maintenance legacy

- Leverage and integrate with existing support models:
 - IT: tier 1 support, incident Management, vendor management
 - Business: risk management, business continuity
- Understand upcoming environment changes and its impact to existing robots
- Proactively plan capacity for maintenance and incidence management vs. new development and enhancements



Target Dev Capacity Allocation



Key Learnings

- **The right solution**

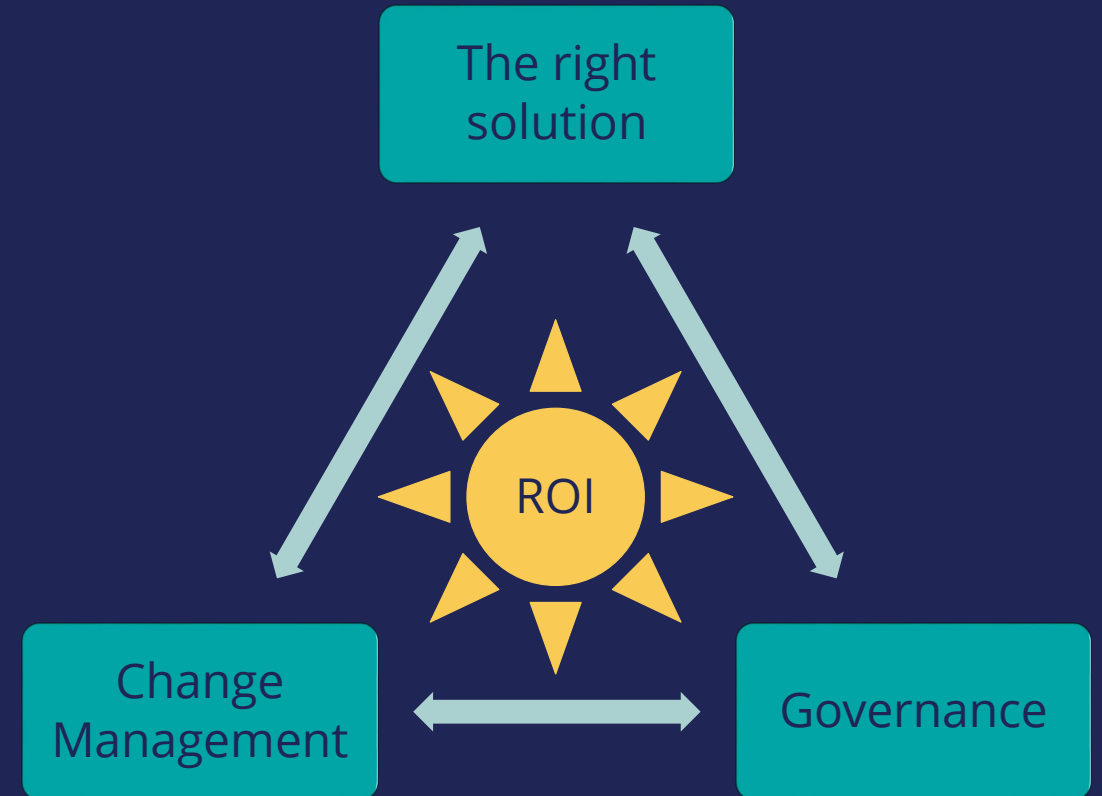
- Using the right tool (Lean, Macros, Robotics, Reporting, IT)
- Value driven solution design and development (80/20)

- **A Centre of Excellence aligned to the business**

- Critical to developing and supporting a fully integrated deployment
- Accountable for in-take, assessment and prioritization (connected to the Lean practice)
- Measures and manages ROI

- **Change management is key**

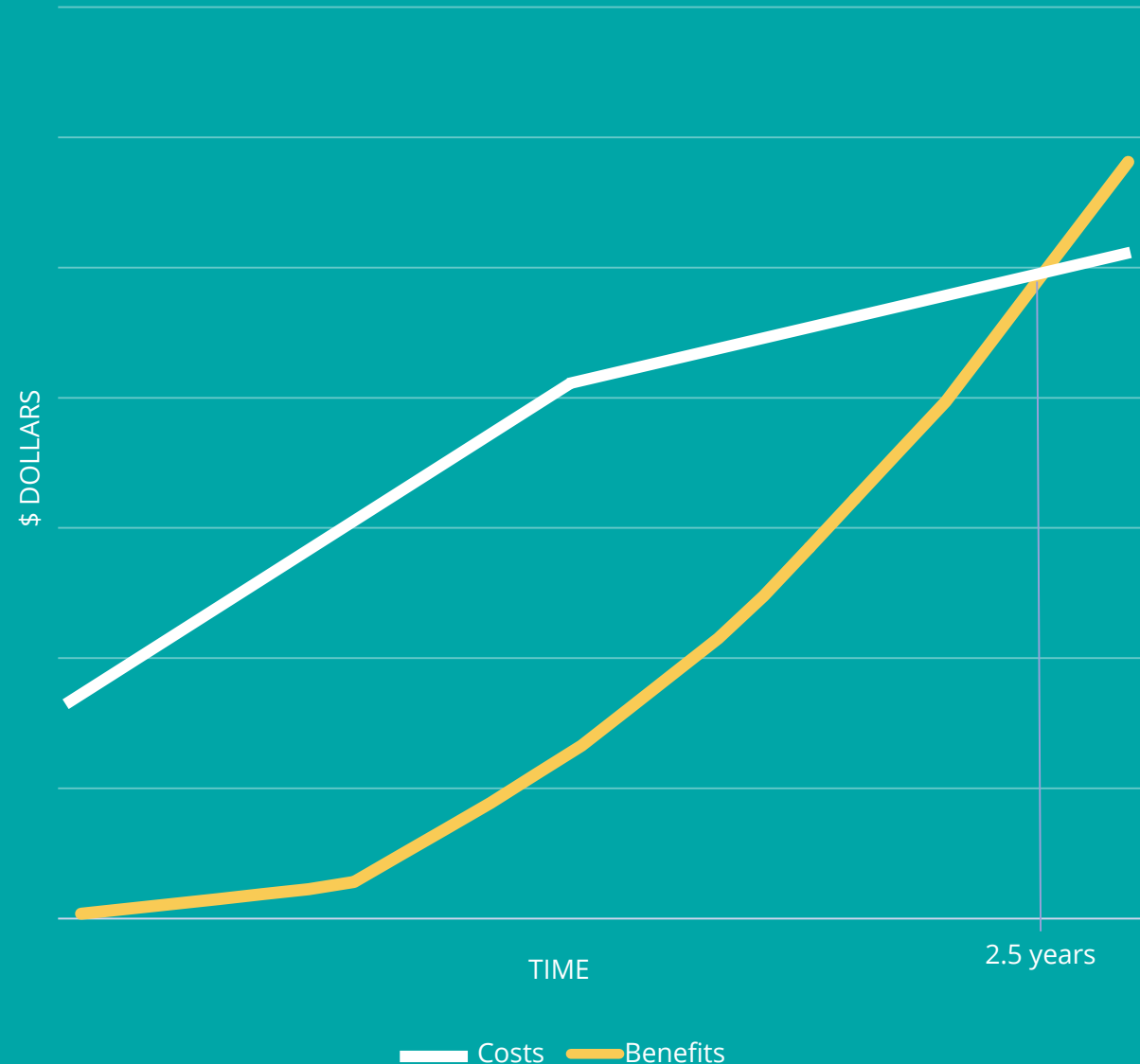
- Executing using agile and RA tools
- The promise of better performance doesn't guarantee user adoption
- Engagement from key business stakeholders is critical



Our Results

- **Program payback of 2.5 years**
 - Setup costs
 - Consulting fees
 - Initial licence costs
 - 12-16 month payback on individual bots
- **Adoption:**
 - 100% of our Client Care Centre
 - 9 business units across Sun Life Financial Canada
 - 2 million+ transactions
- **Improved process and efficiencies through scaling**
 - Refine project selection criteria
 - Reduce costs by bringing dev teams in-house
 - Multiple bots on a single desktop
 - Leveraging existing code wherever possible

Program Payback



Closing Comments – Video

Any advice for teams
pursuing Robotic Automation?





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