

## A five-step process to developing an automation strategy



### **Assess for automation opportunities**

- Which processes are good candidates for automation?
- Which processes would be suitable to pilot?
- How should the process owners be engaged to try automation?
- What are the impacts of proceeding with the pilot?



### **Build your business case**

- Why does automation support your business needs?
- What are the benefits?
- What are the pain points being alleviated?
- What are the metrics to determine whether automation is valuable?
- What is the strategy for re-deploying existing resources after automation?



### **Determine the optimal operating model**

- Which operating model works best for your organisation?
- Do you have the right team to support the solution and carry out responsibilities (e.g., assessing new processes for automation and testing the automated jobs)?
- Who will manage and monitor the software robot?



### **Identify your automation partner(s)**

- Who are the main vendors in the RPA space?
- Who are the providers who cater to your business needs the most?
- Which sourcing option do you want?
- How should you compare the pricing models in order to understand what you are paying for?



### **Plan the automation roadmap**

- How long should your pilot be?
- What are the stages after the pilot?
- What is your strategy for scale?
- How will you ensure impacted stakeholders understand the what, why, and how of automation?

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