



Wilson Perumal
& Company



**OFFERING
INTRODUCTION**

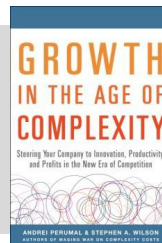
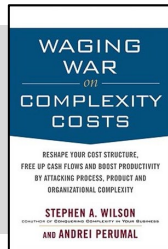


PROCESS AUTOMATION

REFOCUS EMPLOYEES ON VALUE-ADD WORK

Wilson Perumal & Company at a glance

- Focused on complexity, helping clients compete in a complex world
- Boutique, strategy & ops consulting firm with ~40 full-time consultants
- Founded 2009 by Stephen Wilson and Andrei Perumal
- Value & results oriented: focus on profit, growth and working capital outcomes
- Publications: 2 books published by McGraw-Hill and significant work with The Wall Street Journal
- Our clients are leading corporations and private equity firms
- Consistently recognized (e.g., 2019 Best Small Strategy Firm to Work For)



Executive Summary

- Rapid changes in the business and technology landscapes have led to process inefficiencies
 - Covid-19 has introduced new challenges and exacerbated existing ones
 - A remote workforce and other paradigm shifts require rethinking processes
- Process Automation can yield significant ROI, but has its own risks
 - Our clients have enjoyed over 40% ROI in the first year as well as significant long-term and intangible benefits
 - When done incorrectly, process automation can fail to provide value, drag on indefinitely, entrench existing issues, and wreak havoc on adjacent processes
- WP&C can guide your company's process automation initiatives
 - We offer solutions ranging from a remote two-week assessment to a full 16-week end-to-end solution including pilot execution, & training
 - Our approach ensures that the right processes are automated in the right way, minimizing risks and avoiding costly pitfalls
- We have been chosen by some of the world's largest clients because we focus on organizational and process design along with technology

Rapid pandemic-related changes have introduced and exacerbated risks, inefficiencies, and other challenges

REMOTE WORKFORCE

- Increased cyber security risks and unreliable internet connections
- Mundane repetitive tasks are especially difficult outside the office environment*
- Recruiting, onboarding, and typically in-person functions need to be rethought

HOME-BASED CONSUMPTION

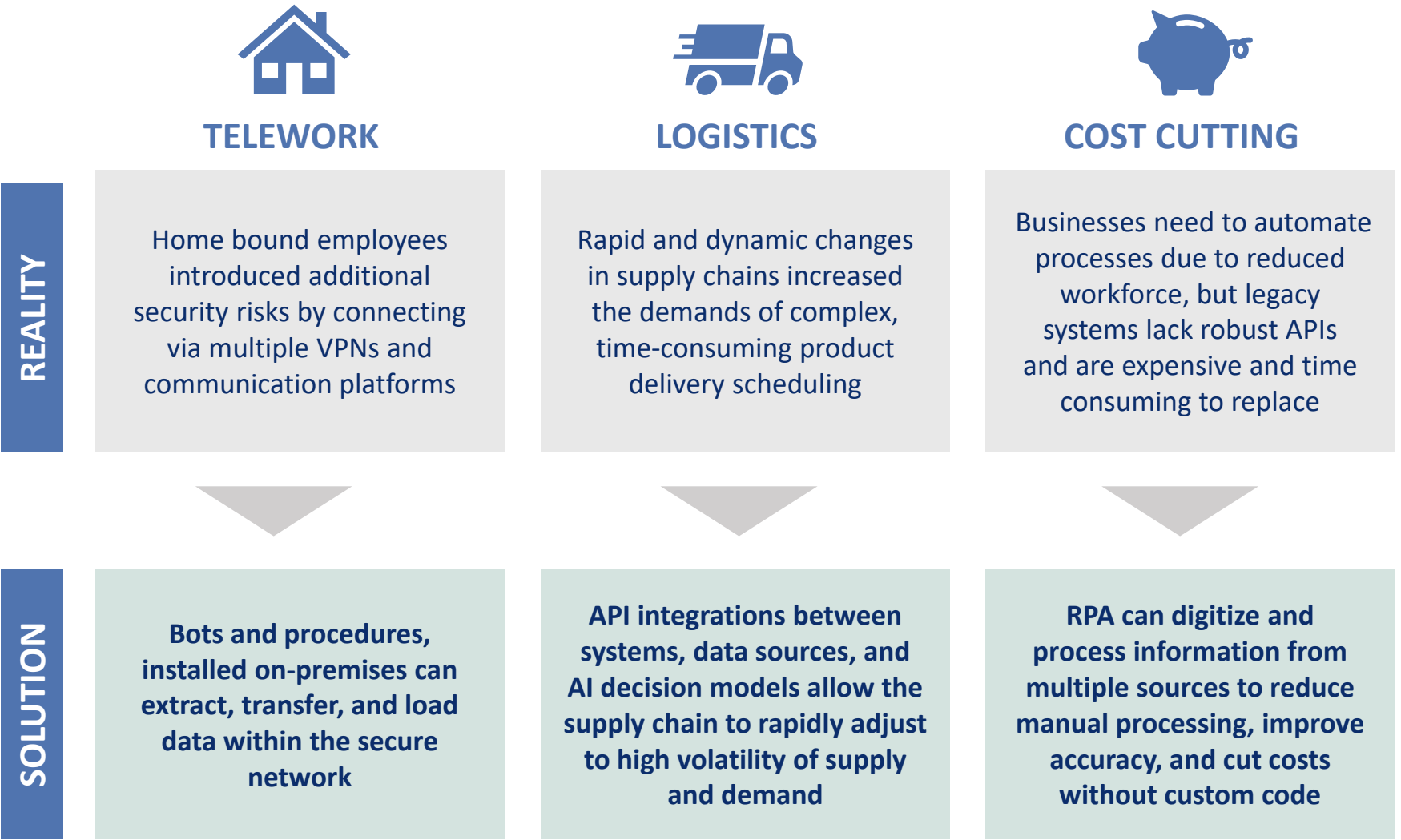
- Online retailers, grocery distributors, and high demand products need to scale their processes to handle increased demand
- Rapid changes to supply chains have led to an increase in manual processes

COST CUTTING CLIMATE

- Headcount reductions necessitate increased workforce efficiency
- Workarounds required in lieu of legacy system overhauls/upgrades

* <https://www.sciencedirect.com/science/article/abs/pii/S0167268112000893>

Process automation can increase efficiency and mitigate risks that have emerged in the wake of COVID-19



Robotic process automation, for example, delivers immediate ROI and lasting business value

IMMEDIATE VALUE

- **Reduction in cost and hours** → *Digital RPA workers complete tasks significantly faster and at far less cost than humans*
- **Decrease human error** → *75% of all manually entered data is incomplete, inaccurate, or ambiguous¹*
- **Increased value from human capital** → *Bored employees are twice as likely to leave their jobs²*

LONG-TERM VALUE

- **Improved employee morale** → *“This is the part of my job I hate the most” – Subject matter expert for RPA target process at WP&C client*
- **Better customer satisfaction** → *Auto insurers are using RPA to gather DMV records for new applicants, getting premium offers to customers more quickly³*
- **Quicker executive decision making** → *Process automations surface accurate information to executives more quickly*

First year ROI of previous WP&C RPA project is estimated at over 40%¹

1. <https://www.scu.edu/ethics/focus-areas/internet-ethics/resources/the-human-cost-of-computer-errors/>
2. <https://www.inc.com/gene-hammett/your-employees-are-bored-heres-how-to-change-that.html>
3. <https://medium.com/@vratulmittal/rpa-re-inventing-the-insurance-industry-f3eb5d6ac05d>

Despite its effectiveness, process automation introduces additional challenges and risks to your business

THERE ARE MANY WAYS TO AUTOMATE PROCESS

- Overhauling and upgrading legacy systems
- API & Programmatic Integration
- Robotic Process Automation (RPA)
- Chat Bots
- Knowledge Bots
- AI/ML Models

EACH REQUIRES TRADEOFFS

Full featured	↔	Low cost
Stability	↔	Immediacy
Scalability	↔	Flexibility
Root problem	↔	Patching

EACH CREATES COMPLEXITIES

- Changes in roles, tasks, and functions
- Need for re-engineered processes
- Impact on customer/supplier interactions
- IT & Security considerations

Understanding process and organization, along with technology, is required to execute process automation correctly

WP&C's range of solutions helps navigate process automation and minimize associated risks

RAPID REMOTE ASSESSMENT

- Narrow focus on specific department or function
- 3-5 potential pilot processes pre-determined
- Immediate results required

2-week assessment

- Assess applicability of various process automation approaches
- Identify no regret pilot process
- Identify best fit technology providers

4-6-week pilot execution add-on

- Set success criteria
- Execute pilot and measure results

END-TO-END PROCESS AUTOMATION GUIDANCE

- Broad cross-organizational focus
- Indefinite potential processes
- Ambiguous starting point
- Need for self-reliance

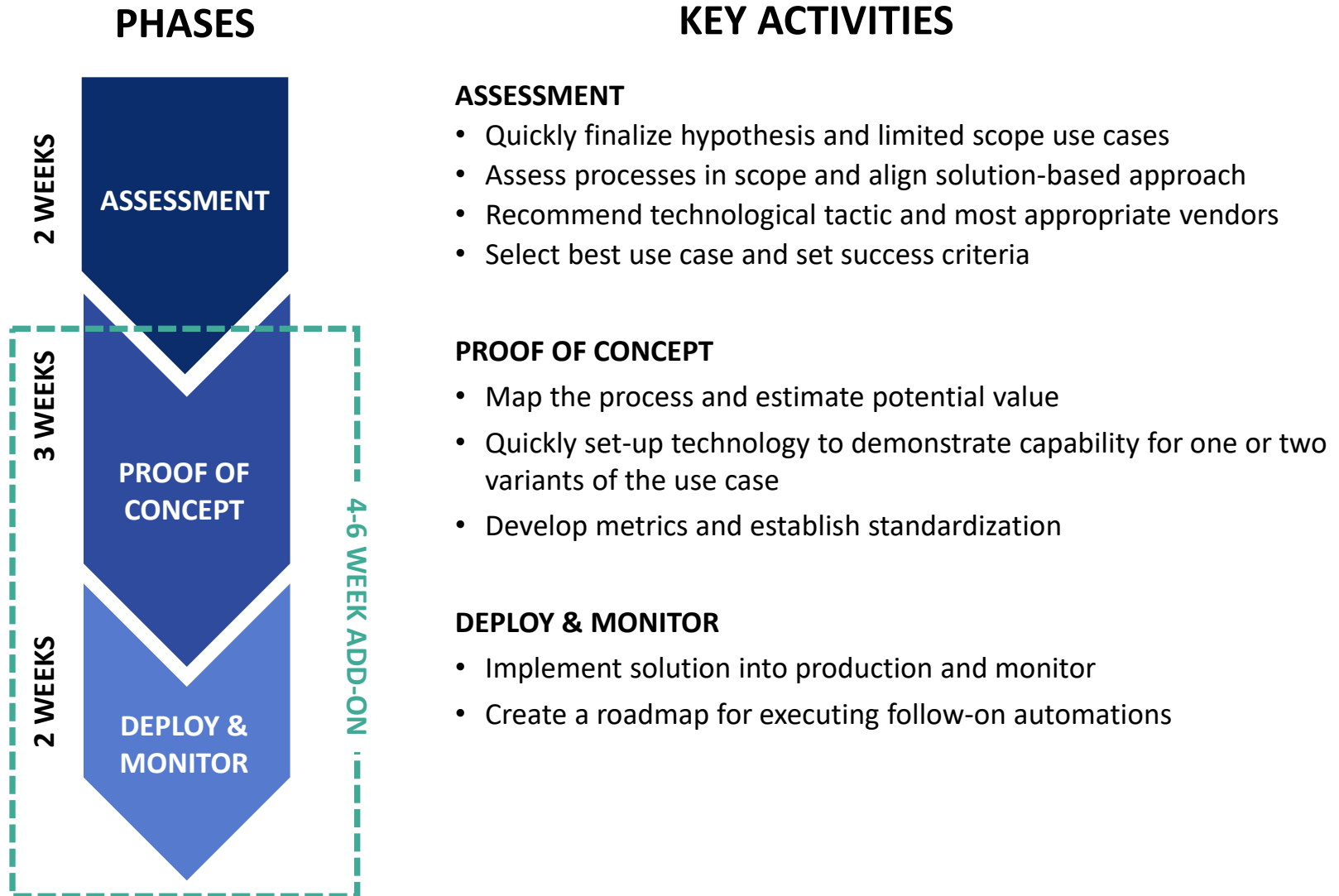
4-6-week assessment

- Assess how process automation fits within the company's tech and org structure
- Identify and map processes, and recommend specific automation approaches
- Select no regret pilot processes
- Identify best fit technology providers

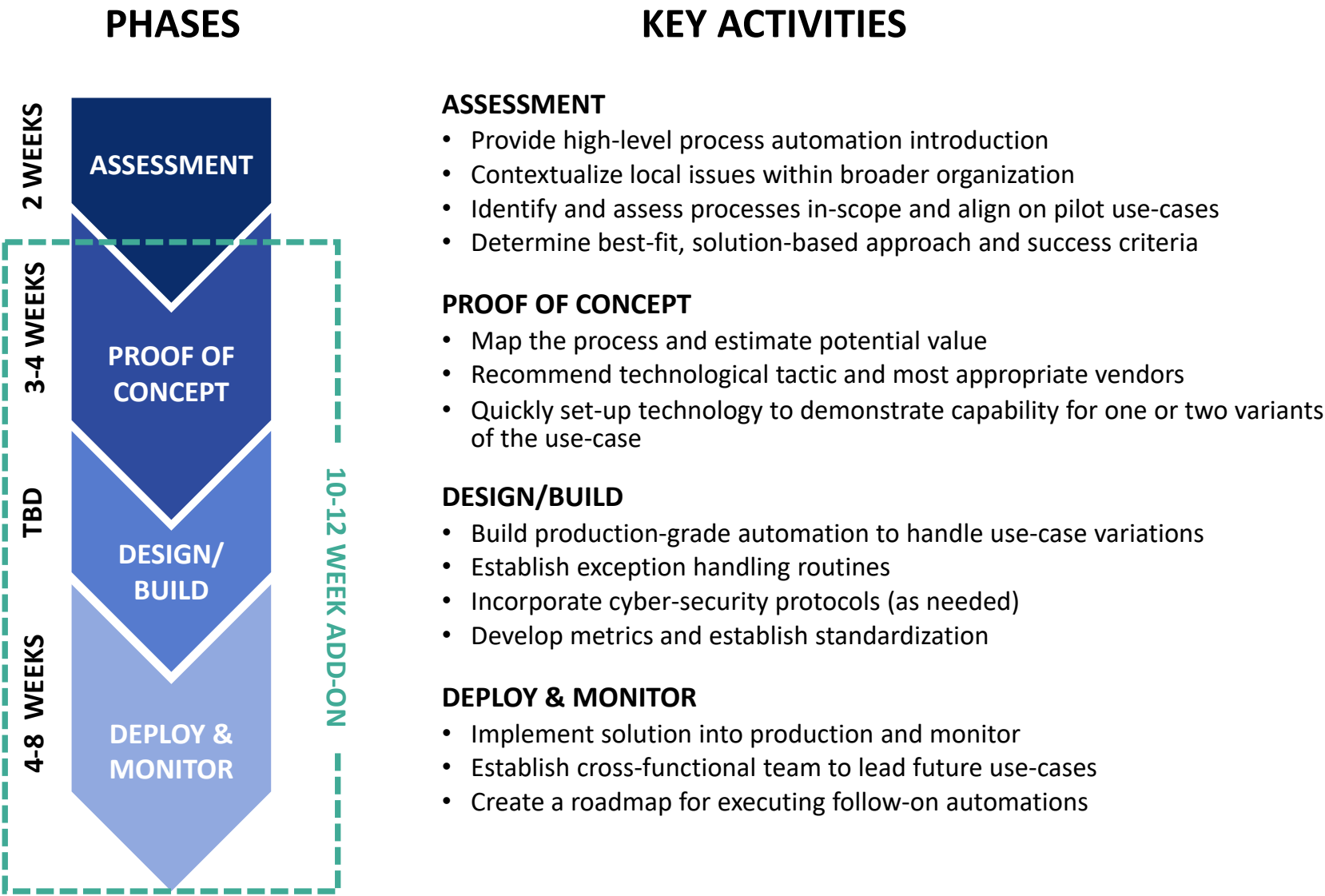
8-12-week production implementation and capability transfer

- Set success criteria
- Execute pilots and measure results
- Train staff to transition company to self-reliance

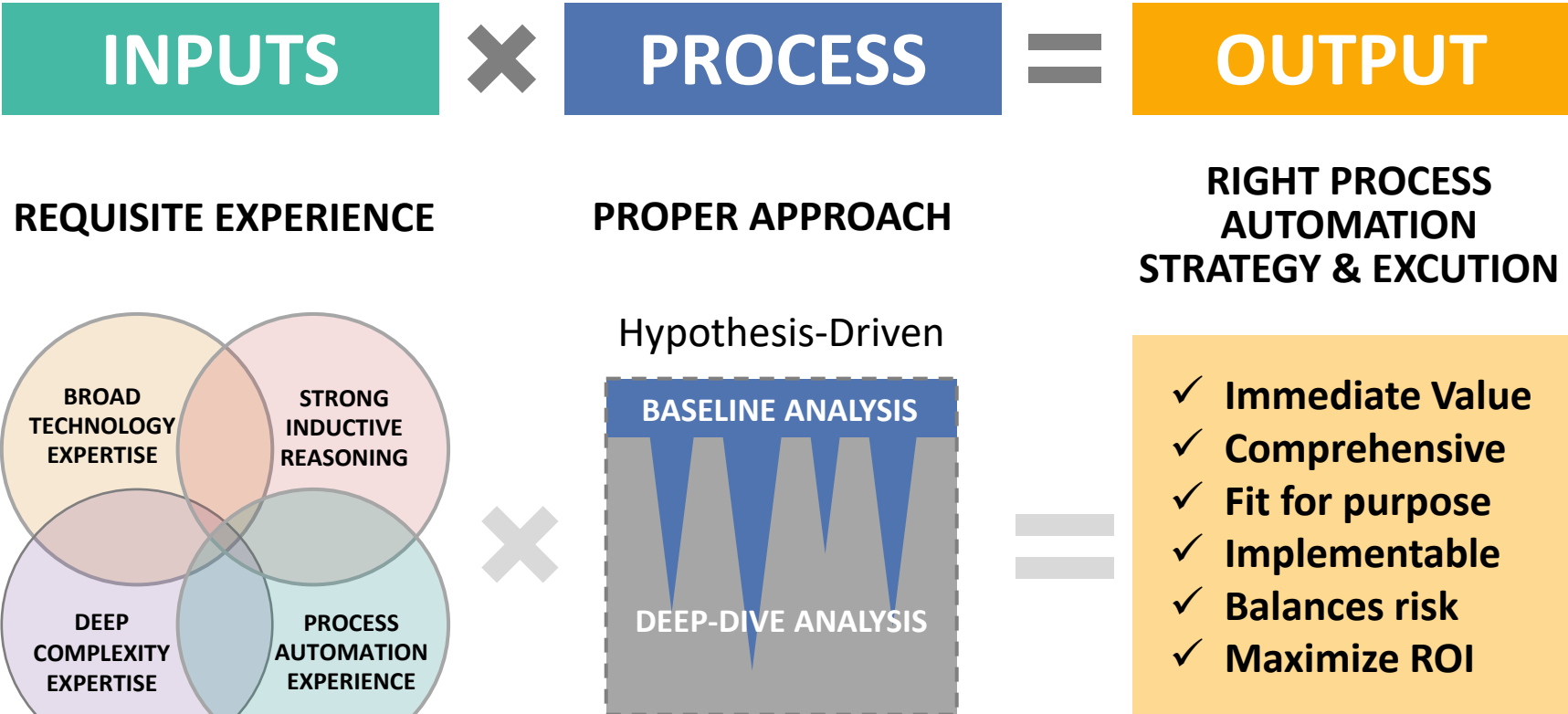
Our rapid remote assessment will ensure your company starts off process automation right



Our end-to-end process automation guidance will ensure your staff has mastered process automation



Our combination of expertise and top down approach makes us the ideal partner for process automation



WP&C is the right partner for process automation

Our hypothesis-driven approach is the right approach for developing a strategy in a complex environment

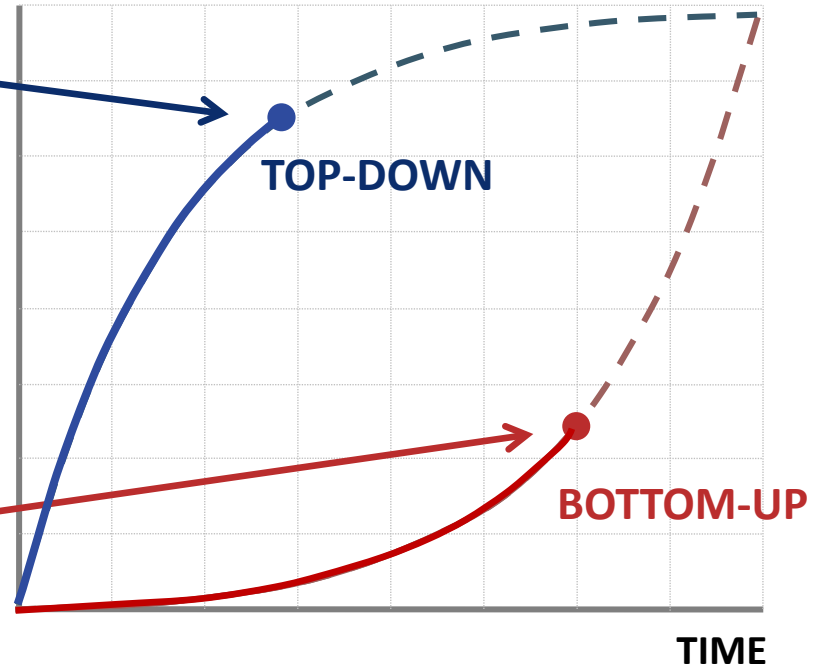
WHERE OUR APPROACH TAKES YOU

- More informative / faster results
- Top-down / focused on the linkages
- Clarity first, precision second (clarity determines where we must get precise)
- Directs effort to most valuable activities
- Most appropriate for strategic issues/questions

WHERE TRADITIONAL APPROACHES TAKE YOU

- Takes longer and is less informative
- Reductionist, bottom-up approach
- Inflexible (doesn't adjust well to new information)
- Easy approach to lay out, but builds clarity/insight very slowly
- Cumbersome, feels like boiling the ocean, usually falls under its own weight
- Not well-suited for strategic issues/questions in complex environments

CLARITY



Technology strategy requires a different set of skills than technology implementation (system integrators tend to be very poor at tech. strategy)

WP&C's unbiased expertise helps companies choose the best-fit technology for process automation

ROBOTIC PROCESS AUTOMATION

PROGRAMMATIC AUTOMATION

DEFINITION

RPA uses virtual workers to complete tasks at the GUI level (e.g. clicking, typing, copying & pasting, etc.), allowing repetitive, mundane tasks that do not require human judgement to be automated.

Programmatic automation uses scripts, procedures, APIs (application programming interfaces), and data feeds to automate tasks and interactions between business systems, databases and the cloud.

PROS

- New virtual workers can be spun up at any time
- Almost no coding required – anyone can do it
- Avoids IT bottlenecks
- Can work with any desktop program

- Well-developed custom code is stable, fast, versatile
- Addresses the root of a problem
- Documented, managed, and supported by IT
- Solution can span multiple departments

CONS

- GUI dependent, processes slower and less stable
- Often a “Band-aid” entrenching the root problem

- Requires specialized skills, robust APIs, and an SDLC process
- Department is at the mercy of IT to launch and support

WHEN TO USE

- There is limited control of upstream processes
- Legacy systems lack robust APIs
- The problem is limited to one department
- There is a need for speed
- As a temporary solution

- The whole process can be re-engineered
- There are robust APIs and modern systems
- The problem affects many departments
- There is time available to solve the issue
- As a permanent solution

Our wider business experience beyond technology helps companies avoid common pitfalls

PROCESS AUTOMATION IS NOT JUST ABOUT TECHNOLOGY

COMMON PITFALLS

- Too much focus on technology component of solution
- Prematurely committing to a technology vendor

WP&C VALUE PROPOSITION

- Balanced focus on process, strategy, and technology
- Independent, unbiased advisor

IMMEDIATE ROI AND LONG-TERM VALUE BOTH MATTER

- Long-tailed projects that take years to deliver value
- Using process automation as a “Band-aid”

- Quickly add value—previous projects have yielded ROI in less than a month
- Holistic assessment of interconnected issues

UNDERSTANDING ORGANIZATIONAL COMPLEXITY IS KEY

- Adding technology can obscure a deeper problem
- Poor organizational integration

- Understand when automation is right tool for right job
- Deep expertise in organizational complexity

Achieved 40% ROI by introducing RPA

We quickly introduced RPA to a global wholesale durable distributor responsible for over \$50 billion of durable goods, achieving 40% ROI with a pilot automation

THE CHALLENGE

- Organization spends too much time performing manual tasks prone to errors
- Insufficient time and budget to hire a team of software developers to automate the processes programmatically

OUR APPROACH

- Identified processes with the greatest potential ROI from automation through stakeholder interviews and surveys
- Assessed client's specific security, technology, and organizational needs, and selected the best fit technology provider

RECOMMENDATION

- Launch RPA pilot with most potentially valuable process: QA inspections in which manual entry errors resulted in over 24K problematic records
- Establish success criteria to determine next steps

TRANSITION

- Trained client to surface and select use cases and helped establish an internal center of excellence to manage digital workforce
- Sourced a contracted RPA developer to make the client self-sufficient to pursue future use cases

RESULTS

40% ROI from RPA: *executed pilot in under one month using a three-person team, working closely with client technical and functional teams; pilot automation completed process 7 times faster than human workers and yielded 40% ROI*



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CONTACT US

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RESOURCES

Technology Strategy

COVID-19 Insights

Cost Reduction