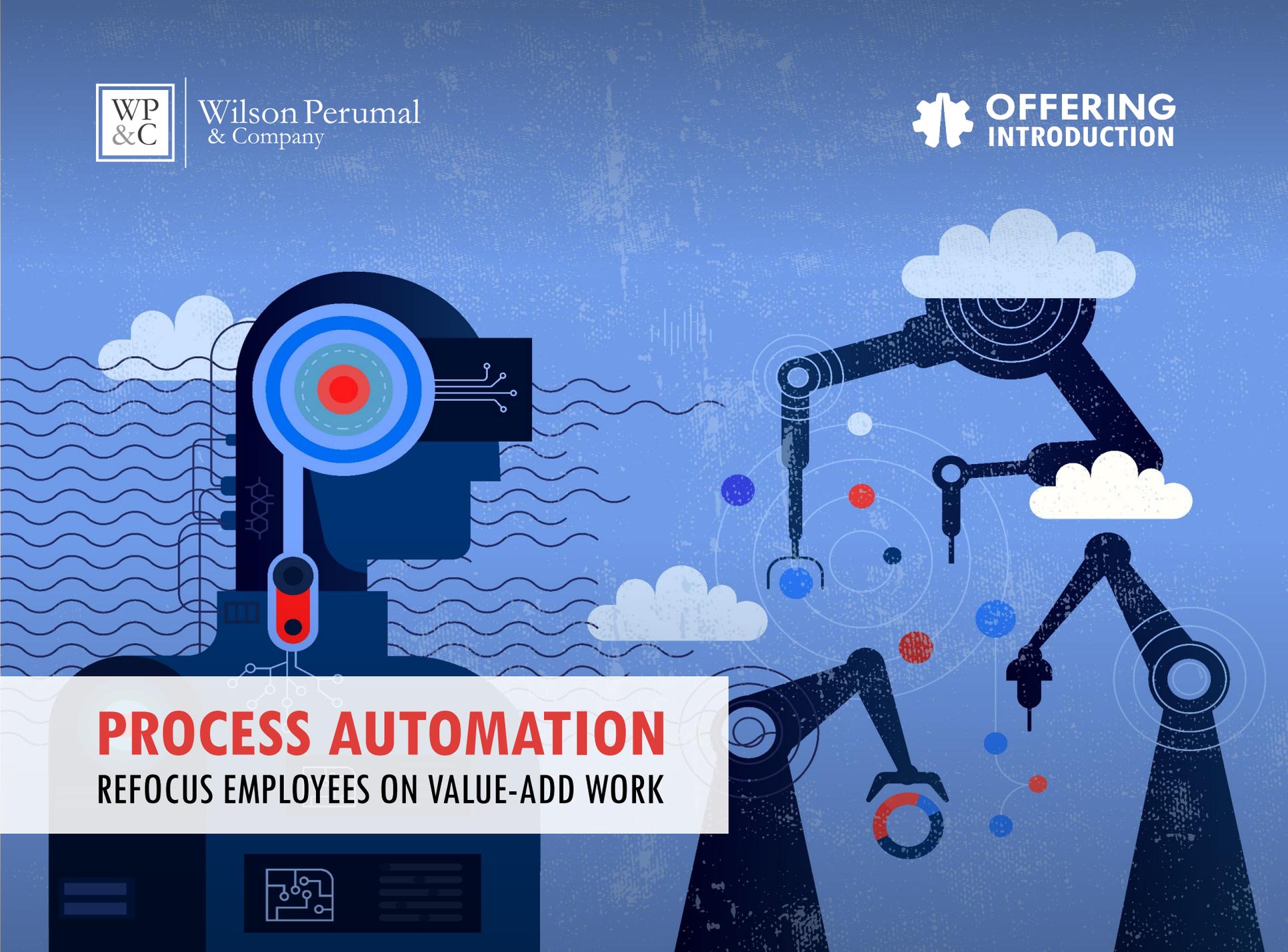




Wilson Perumal
& Company



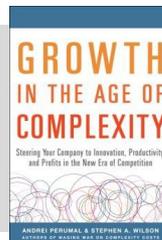
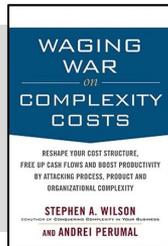
OFFERING
INTRODUCTION

A stylized illustration on a blue background. On the left, a dark blue silhouette of a human head is shown in profile, facing right. Inside the head is a target with concentric circles in blue, green, and red. To the right, several dark blue robotic arms are depicted, some holding colorful spheres (blue, red, white) and others holding a pie chart. The background features white clouds and wavy lines. A white banner is overlaid at the bottom left.

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



TELEWORK



LOGISTICS



COST CUTTING

REALITY

Home bound employees introduced additional security risks by connecting via multiple VPNs and communication platforms

Rapid and dynamic changes in supply chains increased the demands of complex, time-consuming product delivery scheduling

Businesses need to automate processes due to reduced workforce, but legacy systems lack robust APIs and are expensive and time consuming to replace



SOLUTION

Bots and procedures, installed on-premises can extract, transfer, and load data within the secure network

API integrations between systems, data sources, and AI decision models allow the supply chain to rapidly adjust to high volatility of supply and demand

RPA can digitize and process information from multiple sources to reduce manual processing, improve accuracy, and cut costs without custom code

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

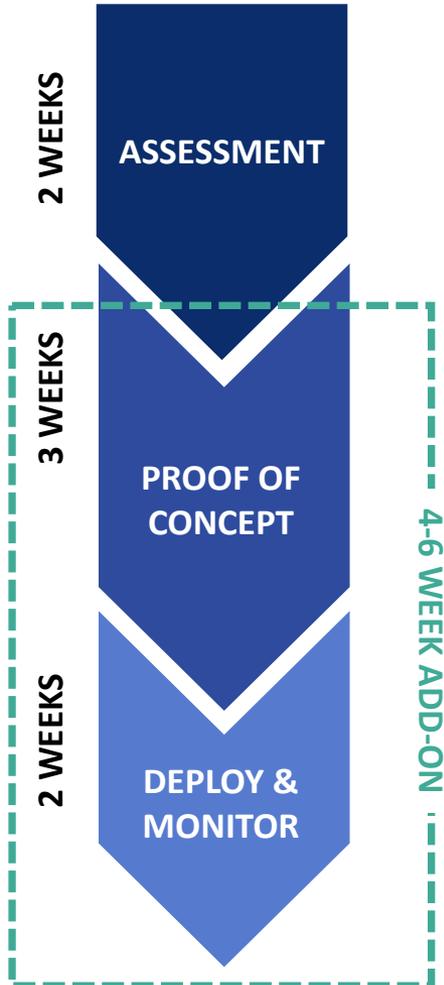
8-12-week production implementation and capability transfer

- 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

PHASES

KEY ACTIVITIES



ASSESSMENT

- Quickly finalize hypothesis and limited scope use cases
- Assess processes in scope and align solution-based approach
- Recommend technological tactic and most appropriate vendors
- Select best use case and set success criteria

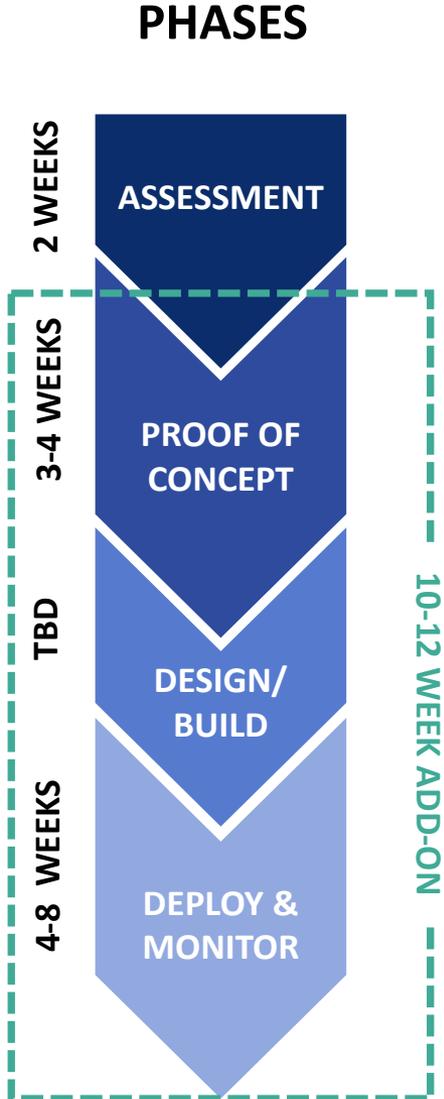
PROOF OF CONCEPT

- Map the process and estimate potential value
- Quickly set-up technology to demonstrate capability for one or two variants of the use case
- Develop metrics and establish standardization

DEPLOY & MONITOR

- Implement solution into production and monitor
- Create a roadmap for executing follow-on automations

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



KEY ACTIVITIES

ASSESSMENT

- Provide high-level process automation introduction
- Contextualize local issues within broader organization
- Identify and assess processes in-scope and align on pilot use-cases
- Determine best-fit, solution-based approach and success criteria

PROOF OF CONCEPT

- Map the process and estimate potential value
- Recommend technological tactic and most appropriate vendors
- Quickly set-up technology to demonstrate capability for one or two variants of the use-case

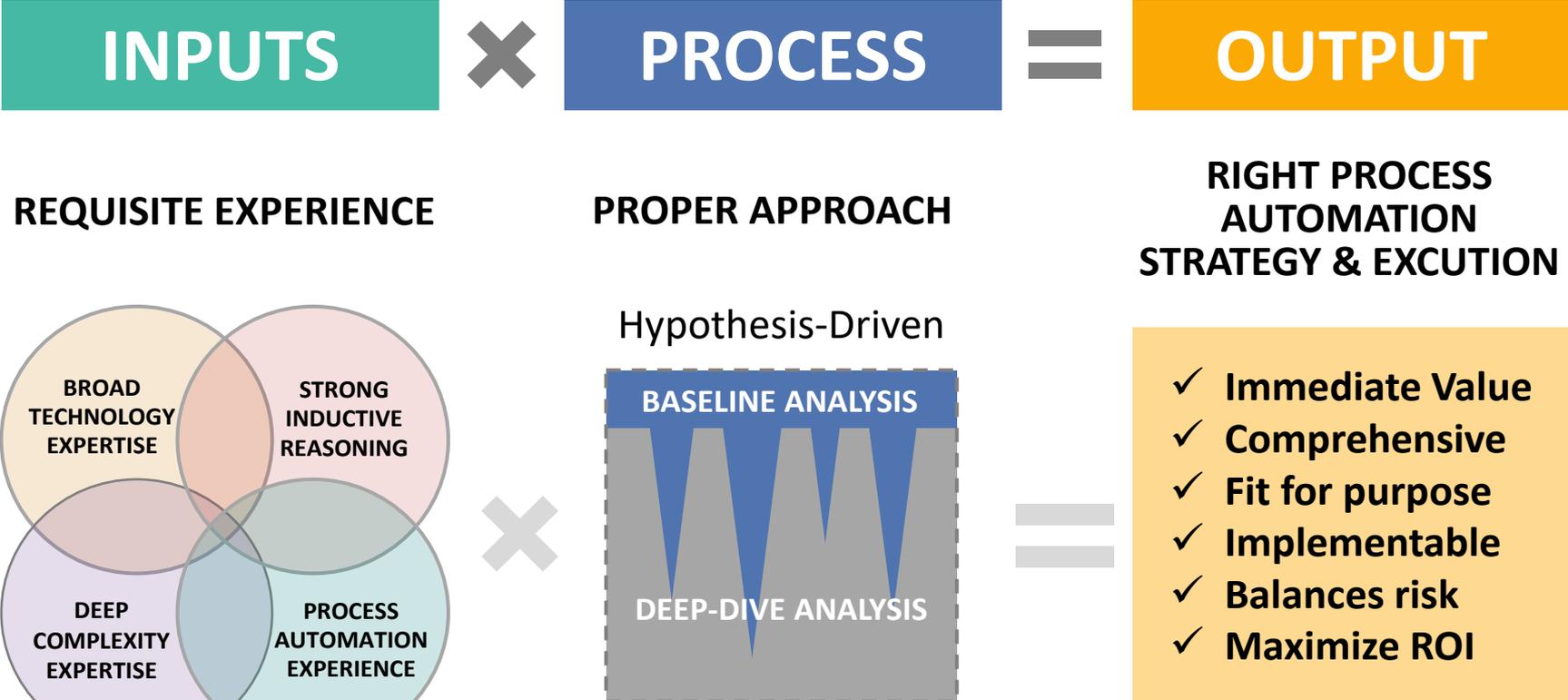
DESIGN/BUILD

- Build production-grade automation to handle use-case variations
- Establish exception handling routines
- Incorporate cyber-security protocols (as needed)
- Develop metrics and establish standardization

DEPLOY & MONITOR

- Implement solution into production and monitor
- Establish cross-functional team to lead future use-cases
- Create a roadmap for executing follow-on automations

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

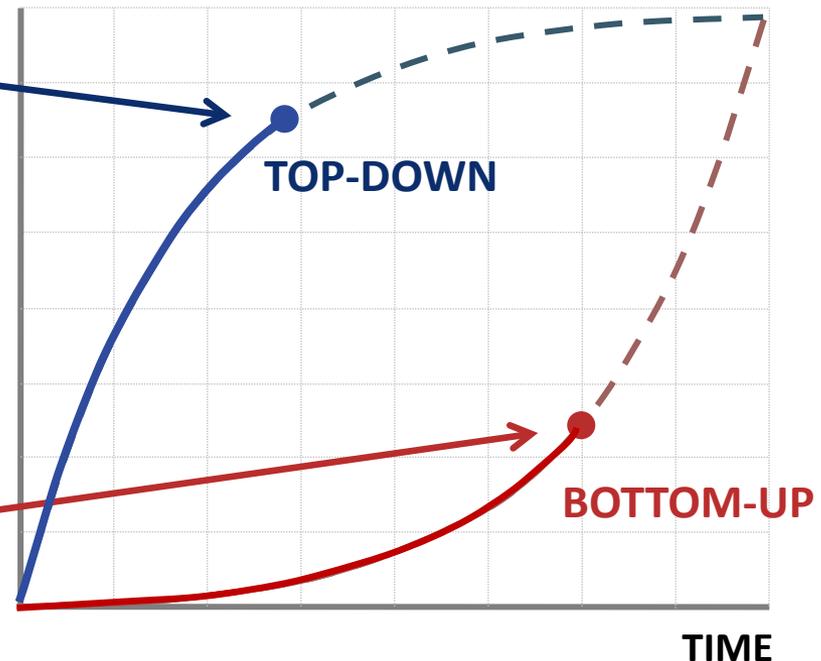
WHERE OUR APPROACH TAKES YOU

- 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**

**IMMEDIATE ROI
AND LONG-TERM
VALUE BOTH
MATTER**

**UNDERSTANDING
ORGANIZATIONAL
COMPLEXITY IS KEY**

COMMON PITFALLS

- Too much focus on technology component of solution
- Prematurely committing to a technology vendor
- Long-tailed projects that take years to deliver value
- Using process automation as a “Band-aid”
- Adding technology can obscure a deeper problem
- Poor organizational integration

WP&C VALUE PROPOSITION

- Balanced focus on process, strategy, and technology
- Independent, unbiased advisor
- Quickly add value—previous projects have yielded ROI in less than a month
- Holistic assessment of interconnected issues
- 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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RESOURCES

Technology Strategy

COVID-19 Insights

Cost Reduction