

The Ultimate

RPA

Cheatsheet

Your guide to passing the
test on the basics of RPA



TABLE OF CONTENTS

03

What is RPA?

04

Benefits of RPA

05

Intelligent Automation

06

Advantages to a Customer

09

Examples of Leveraging RPA

10

Example RPA Use Cases

11

About KeyMark

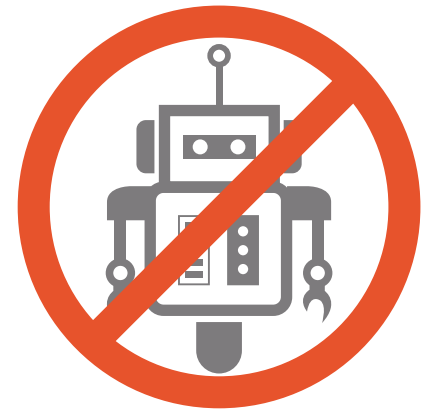
What is RPA?

Robotic Process Automation (RPA) is software that you can program to execute most of your computer-based business tasks by automating repetitive, labor intensive work, RPA helps free your human workforce to create, build and innovate. RPA is a cost effective, less intrusive automation solution that delivers big benefits to business in terms of cost savings, increased efficiency, easy compliance and improved accuracy.

There are no actual robots

“Bot” Synonyms and Alternatives:
Digital Workforce, Digital Workers, Intelligent Digital Worker

A Digital Worker is a skilled evolution of a traditional bot. Bots share desktops with humans. Digital workers are autonomous and can dynamically work within an organizations systems and processes to achieve intelligent automation. They're easy to scale, highly adaptable and a key part of building an operationally agile and connected enterprise. In short, digital workers have a different set of automation skills that allow them to be a little more collaborative than a traditional bot.



Explaining the benefits of RPA

It increases speed and productivity, decreases costs, increases accuracy and makes compliance simple and fast in the back office, while enhancing customer service and satisfaction in the front office.

Human replacement vs. freeing employees to focus on more valuable tasks:

RPA allows an organization to build out the capacity of their enterprise. Adding a digital workforce enhances the human workforce.



- ▶ RPA brings on more collaboration and brings out the best in humans.
- ▶ RPA leads to improved compliance, accuracy and speed of service.
- ▶ RPA allows organizations to automate more, automate better and automate together.

RDA vs. RPA

Robotic Desktop Automation (RDA) is like a rail transport that moves from one location to another. RPA is like a car. It can travel anywhere, both on- and off-road.



RPA + AI = Intelligent Automation

Intelligent Automation is a more advanced form of RPA where artificial intelligence is married with automation in order to streamline business processes by making complex decisions faster.

Intelligent Automation Example

A big box retailer may want to use a Digital Worker, partnered with AI to reduce inventory shrinkage in their warehouse. Cameras can monitor and scan employee faces to ensure they are in the authorized area. Then, send alerts if they are not.

Advantages to a Customer



+ Reduce Cost and Time to Fund: Headcount, for example, costs significantly more than a digital worker. Rather than waiting on the company to grow, an organization can go ahead and pay for a digital worker.

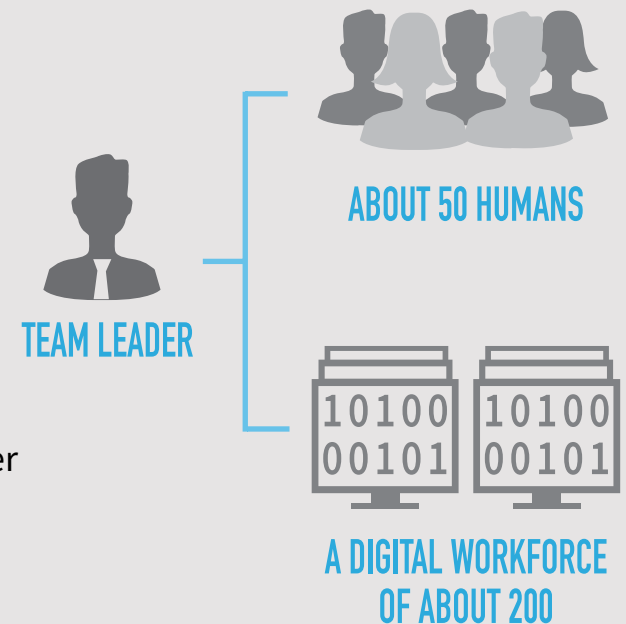
+ Speed of RPA: Intelligent Digital Workers are quick, and can run 24 hours/day concurrently with systems all over the world minimizing human error.

+ Become More Responsive: Improve customer experience by increasing response time.

+ Total Solution: RPA is complementary to everything KeyMark sells. Specifically, capture (OCR), workflow and case management.

+ Flexibility: RPA allows a customer to deploy intelligent digital workers anywhere they need them, as opposed to a single “bot” on a desktop.

In fact, Digital Workers run across any process that is configured to be automated. This is helpful both in terms of usage and with the licensing model, because you pay per digital worker, as opposed to paying for multiple “bots” that are only programmed to do singular tasks.



Advantages to a Customer

(continued)



+ One SKU: Simplicity of pricing. KeyMark can provide one flat cost for RPA with no additional licensing costs.

+ Scale: Once a customer builds a component to manage a Digital Worker, everyone else in an enterprise can use it. Companies don't have to constantly reinvent how the pieces of the configuration work.

+ Security: KeyMark provides an RPA solution that is compliant, with a Veracode Level 5 Certification.

Additionally the RPA solution is governed by a business' IT organization.



+ Iron-Tight Audit Trail: Blue Prism one of KeyMark's partners, has an ironclad solution that can be easily audited. This is why over half of the top 100 financial institutions use Blue Prism!

+ 100% Customer Retention: When it comes to Blue Prism, literally no customer has ever left.

+ No Code Required: Not low code. No code. (You can have code if you'd like but it's not required).



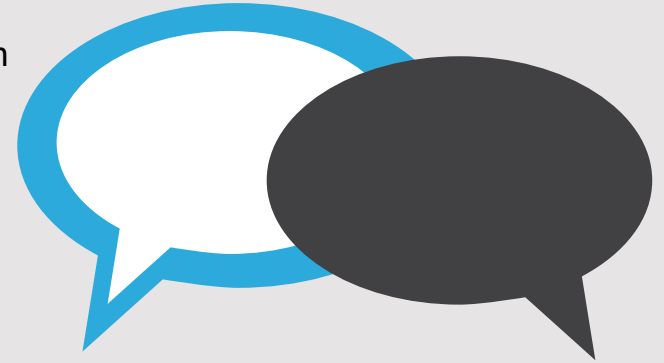
+ Versatility: Some competitors sell robots where 1 robot = 1 process. Blue Prism's intelligent Digital Workers are versatile and can handle multiple processes.

Advantages to a Customer

(continued)



- + **KeyMark Support:** KeyMark's support team works directly with our customers. We meet with our RPA providers daily and are always up on the latest ways to keep our customers moving forward!



- + **Speed to develop:** As a customer scales their solution, development time decreases due to some inherent features like global objects.

- + **Total Cost of Ownership:** KeyMark RPA solutions wind up being 1/3 of the TCO of competitive solutions.

Here are some examples of how we have seen businesses leverage RPA



1

It's Smart. It Can Read and Import Data from Random Documents

A customer with an accounting system occasionally processes vendor spreadsheets that are sent in a format that the customer's ERP and other accounting systems cannot natively ingest.

RPA will read the spreadsheet and push data into the accounting system for the transactions from the vendor spreadsheet. It can do this in a much shorter time than it would take a person to manually enter the info and it cannot make a mistake.

2

It Can Make Systems Communicate

RPA enables disparate systems to communicate. For example, for one customer, RPA is connecting their HR system with a third-party drug test scheduling system. RPA knows when it's time to schedule a job applicant for a drug test. It goes to the drug test partner's website and schedules an appointment at the facility closest to the applicant. It then sends an email confirmation of the appointment to the applicant to let them know the date, time and location of the appointment.

ERP systems can be expensive to customize. RPA can replace many of those customizations in a much more cost effective, and faster way.

3

It Can Automate Tasks such as Running Background Checks

A non-profit customer who needs to run background checks on donors leverages RPA to automatically run background checks once a donor gives for the first time.

4

It Can Scan the Web and Report Findings

A customer in financial services with a Wills and Trust division leverages RPA to run a daily scan of nationwide obituaries to see who has passed away and whether they match the financial institution's customer base.


Another customer, in the mortgage and lending industry, is using RPA to scan tax and insurance information once they agree to purchase a loan from another institution. This way, the tax and insurance data can be properly applied to the loan at the new institution.

5

Better Customer Experience

In the insurance industry, MGAs and wholesalers are leveraging RPA to get faster quotes from insurance carriers. This is beneficial for both the dealer and the underwriters.

Example RPA Use Cases



Banking

- mortgage lending processes
- verification activities
- customer onboarding
- compliance and risk management
- customer service

Debt Buying / Loan Servicing

- legal recovery filing of complaints
- integration with seller portals
- unclaimed funds data gathering
- credit and background checks

Human Resources

- employment history verification
- onboarding
- offboarding
- payroll
- time and attendance management
- training and education
- compliance reporting
- employee data management
- tax management
- benefits and stock administration
- welcome packets

Insurance

- claims processing and administration
- new business/underwriting
- policy maintenance
- compliance and risk management
- customer service

Healthcare

- maintaining centralized medical records
- handling admissions
- patient eligibility
- physician credentialing

Transportation and Logistics

- shipment scheduling and tracking
- load researching
- invoicing
- credit collections
- order and inventory tracking

IT

- installations
- server and application monitoring
- file and document monitoring
- FTP download/upload/backup
- user setup and configuration
- application integration
- data and content aggregation/migration
- ERP and other systems integrations
- batch processing
- synchronizing/deleting/emptying file folders

Manufacturing

- inventory management
- contract monitoring and enforcing
- supplier portal integration
- work order management
- order processing
- shipment scheduling and tracking
- invoice/quote/contract management
- refunds and returns
- freight management

About KeyMark

KeyMark is a leading provider of intelligent automation solutions focused on enabling better business outcomes through capture (OCR), workflow (ECM), case management (DCM) and robotic process automation (RPA) solutions, artificial intelligence, and machine learning technology. KeyMark helps clients leverage technology, such as artificial intelligence and machine learning, to maximize productivity and decrease manual labor in industries such as: financial services, healthcare, insurance, manufacturing, distribution, utilities, logistics and the public sector.

Together, KeyMark, Blue Prism, OnBase by Hyland and Kofax help organizations to scale effectively and achieve operational agility by deploying a digital workforce that maximizes productivity and minimizes manual work. As a value-added reseller of today's leading intelligent automation solutions, KeyMark is one of a select few organizations worldwide to represent such a comprehensive list of automation capabilities with years of proven experience and award-winning Extended Support. Additionally, KeyMark is the creator of Forms InMotion, an innovative software-as-a-service solution for forms automation.

For more information, call 864-343-0500 or send an email to sales@keymarkinc.com.

