

Automation makes work  
more human—enabled by  
Robotic Process Automation

—

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Performance is based on measurements and projections using standard IBM benchmarks in a controlled environment. The actual throughput or performance that any user will experience will vary depending upon many factors, including considerations such as the amount of multiprogramming in the user's job stream, the I/O configuration, the storage configuration, and the workload processed. Therefore, no assurance can be given that an individual user will achieve results similar to those stated here.

# Part 1: Robotic Process Automation

Companies are facing **three** key operational challenges



# 01

Customer demand is volatile

**...requiring the ability to quickly scale up or down**

# 02

Industries are being disrupted

**...requiring rapid creation of new products and services**

# 03

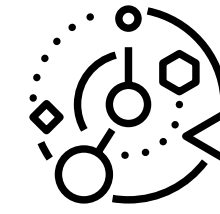
Remote employees are struggling to get work done

**...requiring new capabilities to remain productive**

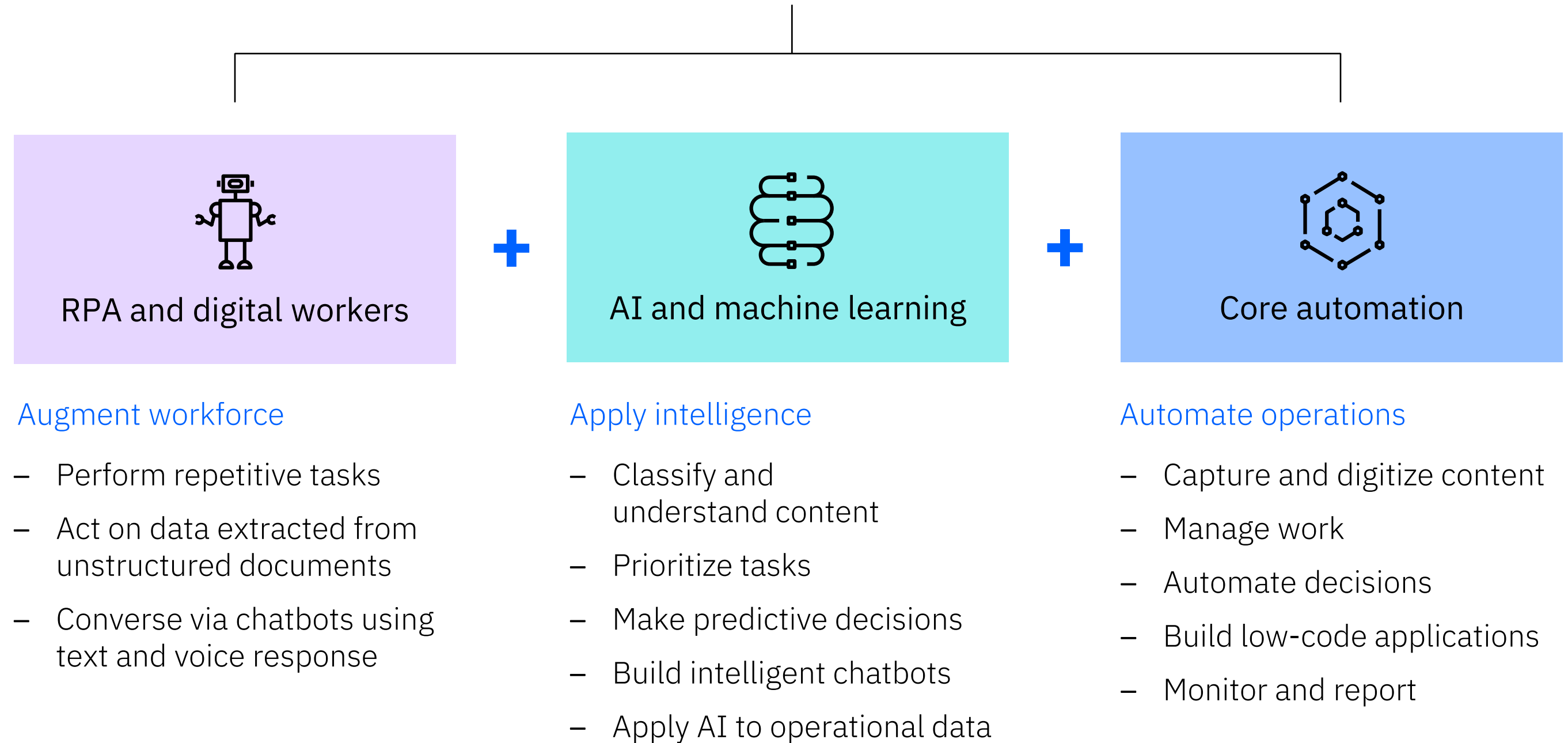
# Hyperautomation helps solve these challenges

Hyperautomation **is a Gartner Top Strategic Technology Trend for 2021**

Source: [Gartner](#)



## Hyperautomation



# How Robotic Process Automation (RPA) works

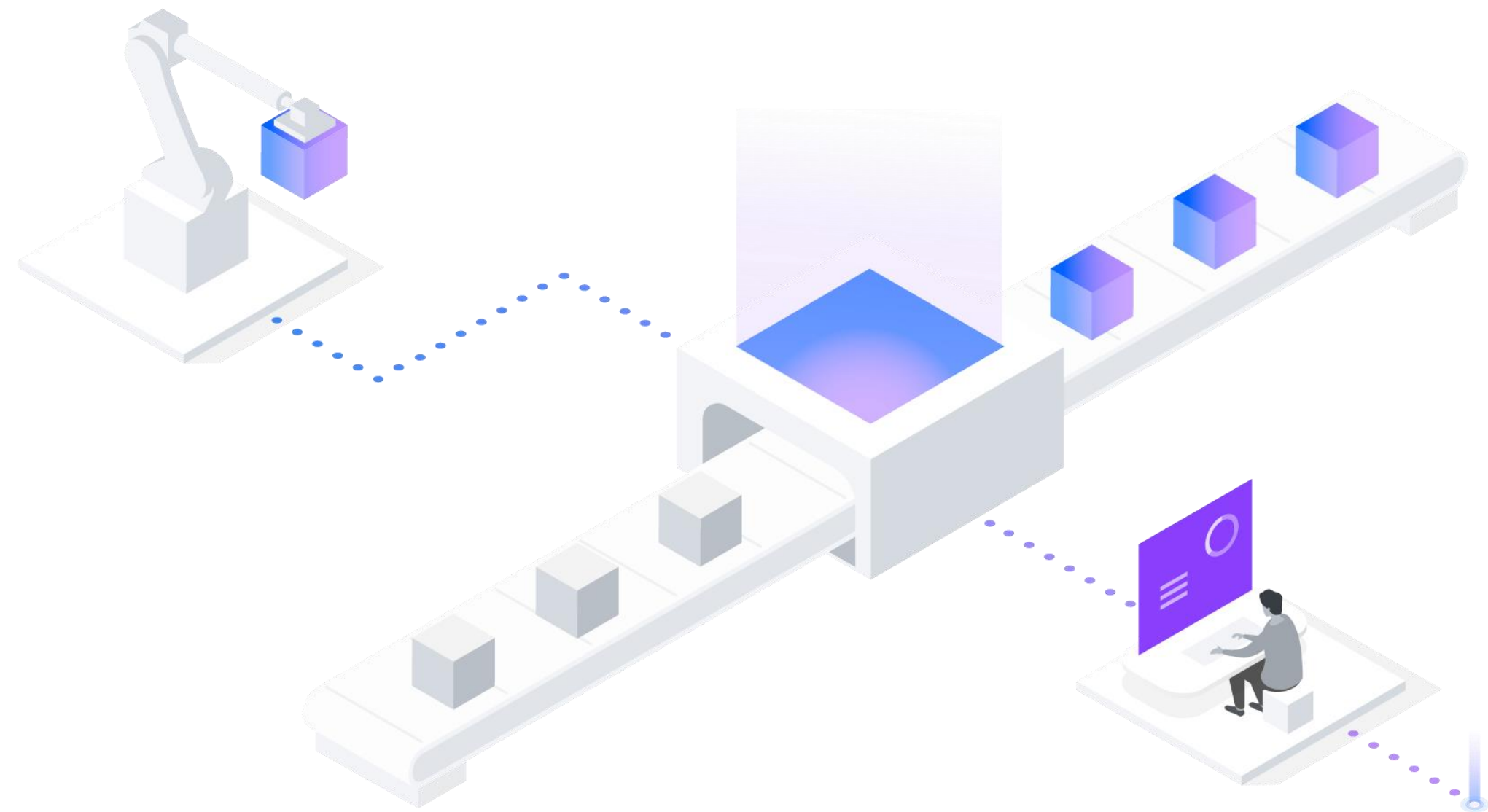
In the context of hyperautomation, **RPA is often the first step to introduce automation.**

RPA is the use of software bots to automate repetitive, routine tasks performed by knowledge workers.

RPA bots replicate the actions of humans interacting with application user interfaces.

**RPA is quick, simple, and safe** to deploy:

- No changes to existing interfaces
- Reduces errors associated with swivel chair integration
- Efficiently execute high volume work



# Supercharge RPA with AI

For more info, read this [blog post](#).

These [three intelligent automation capabilities](#) make RPA more interactive and sophisticated, so you can move beyond automating back-office processes:

## Intelligent virtual agent (IVA) chatbots

Combining chat and RPA commands with AI and ML enable RPA bots to converse with humans across multiple channels, including employees and customers, and opens up new use cases besides simple back-office automation.

## Intelligent capture

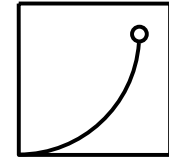
Built-in Optical Character Recognition (OCR) makes it easy to build bots that can extract and classify data and eliminate manual document processing. Cognitive capture tools with deep learning reduce the time and cost for training the models.

## Natural language processing (NLP)

Bots that either interact directly with humans or process human content, with NLP, bots can understand what's being said and then respond appropriately.

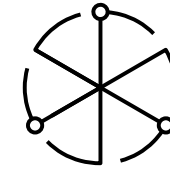


# Key benefits of Robotic Process Automation



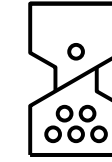
## Accelerate time to value

Create, test and deploy new automation schemes in hours, instead of days or months



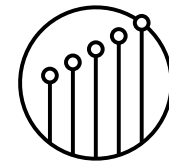
## Reduce human error

Virtually eliminate copy-and-paste mistakes from entering the same data into multiple systems



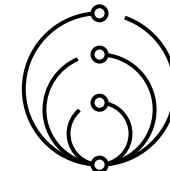
## Increase throughput

Fulfill automated tasks in seconds or minutes, round the clock



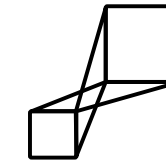
## Boost productivity

Move repetitive tasks to always-on bots enabling employees to spend more time on innovation



## Lower operational costs

Experience cost efficiencies that occur when you automate routine, manual tasks and shift employees toward higher-revenue efforts

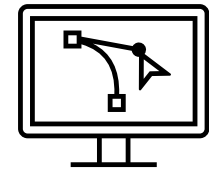


## Scale on demand

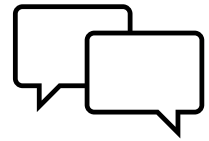
Quickly reduce or add bots as needs fluctuate and give your business an advantage by creating customer experiences that can scale



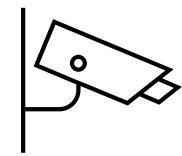
# Competitive Differentiators



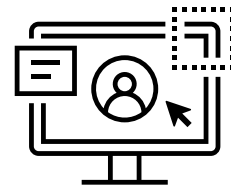
[650+ Drag and Drop Commands](#) with tremendous amount of prebuilt integrations for easy wizard use (Outlook, Word, PDF, SAP, Etc)



[Native Chatbot and IVR runtime](#) Within the product. When SaaS exposable as Slack Chatbot, Facebook Messenger Chatbot, Etc



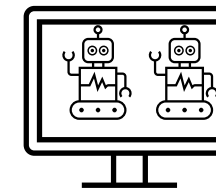
[Recorder Capabilities](#) accelerates Bot development. Specific controlled automation through targeted recorder usage. Also the visual recorder for image identification and usage for selection is extremely easy to use



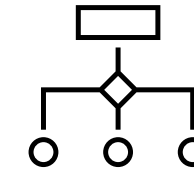
[Powerful Developer tools](#) with Developer Quality of Life features for easy developer interaction (Implicit wait for dynamic latency, Remote debugger, Variable Auto Creation, Ctrl Space Variable Selection)



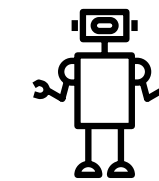
[Cloud Native](#) for fast provisioning, elastic deployments, 4GL automation with services-first architecture, portable Attended & Unattended automations



[Scalability through Concurrency](#) only RPA product that allows multiple bots to run on same machine at same time



[Complete Hyperautomation offering](#) with CP4BA: Intelligent Process Automation either On-prem or SaaS, ranked as the top leader in both technology and services



[Integrated offering](#) no dependency on Windows WF Foundation or TrustPortal, provides integrated state-of-the-art OCR with ABBYY engine, Chatbots, IVR/AVR, direct xlxs read/write



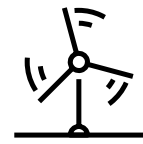
[IBM's Global Presence and Support](#) around the solution ensure success across any and every client suite and local support in native language

# RPA use cases by industry



## Banking and insurance

- Onboarding
- Insurance claims tasks
- Loan origination



## Energy and utilities

- Data collection and reporting
- Contracts
- Regulations and compliance



## IT

- Data entry
- Capture
- Mass email management
- Reporting
- Data synchronization



## Travel and transportation

- Invoices
- Payroll
- Vehicle checks and reporting



## Healthcare

- Doctor reporting
- Medical bills
- Medical claims tasks



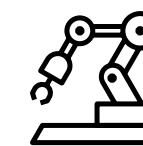
## Media and communications

- Order management
- Provisioning
- Crisis management



## Government

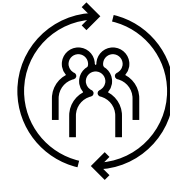
- Benefits processing
- Eligibility
- Self service updates



## Cross industry

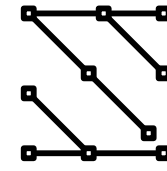
- Customer Support
- HR processes
- Reporting
- Data migrations

To automate more types of work, **beyond the repetitive**, at scale, your bots need...



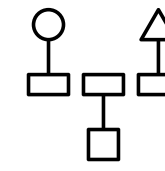
## Human-in-the-loop

Coordinate work with humans to start-to-finish process



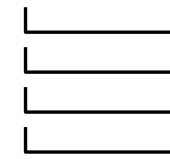
## Cognitive Capture

Understand a wider range of unstructured documents to facilitate data-rich scenarios



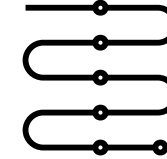
## Natural language business rules

Be a bit more agile, leveraging the decision-making skills of an expert



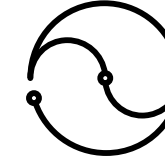
## Content management

Organize and store content for easy retrieval



## Process mining

Gain detailed information on how processes are performing to determine where to get the highest return



## Artificial Intelligence

Enable your bots to learn, think, and reason like a person to reach a desired outcome

# Coordinate work with humans in a start-to-finish process

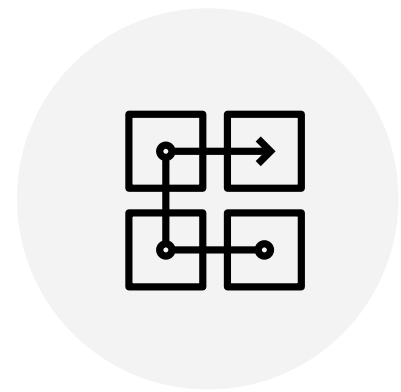
## Combining **workflow** with RPA

### Claims processing use case: Workflow starts a bot



#### Policy holder

1. Submits a claim form



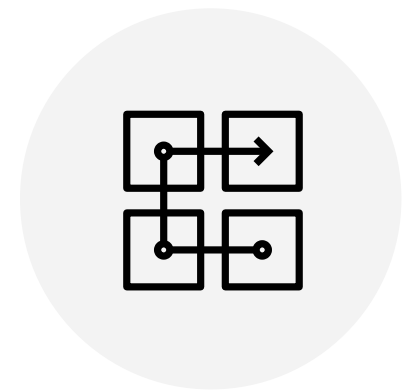
#### Workflow

2. Orchestrates claims process (including humans, systems and robots)



#### RPA

3. Retrieves data from claim system, policy application and provider system
4. Enters data into claim system



#### Workflow

5. Routes claim for financial review
6. Routes claim for approvals

#### Workflow extends the value of RPA by:

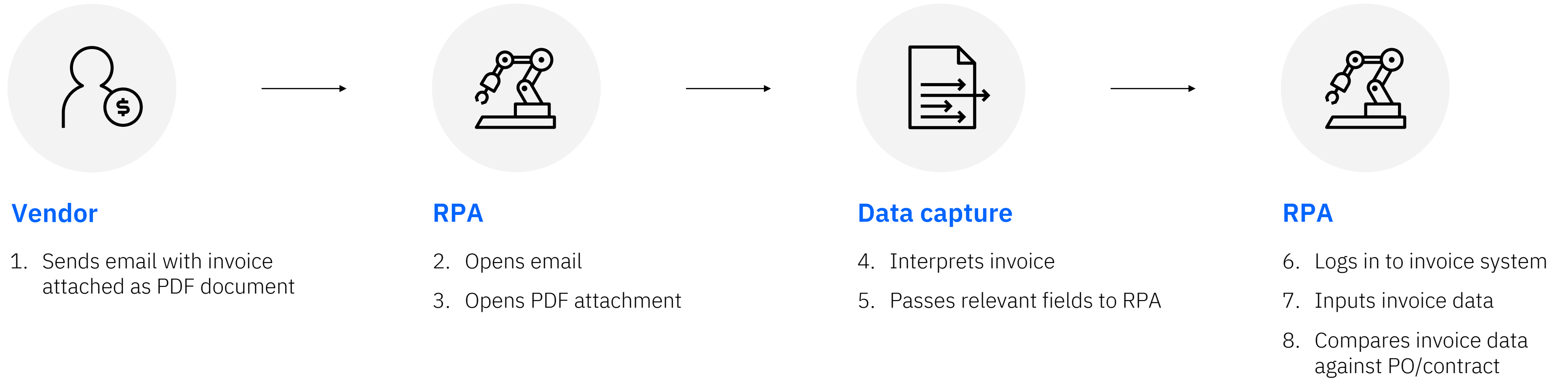
- Monitoring and enforcing Service Level Agreements
- Managing end-to-end process

- Managing exception processes
- Tracking the status of exceptions

# Get your bots to process unstructured data

## Combining **capture** with RPA

### Invoice entry task use case:



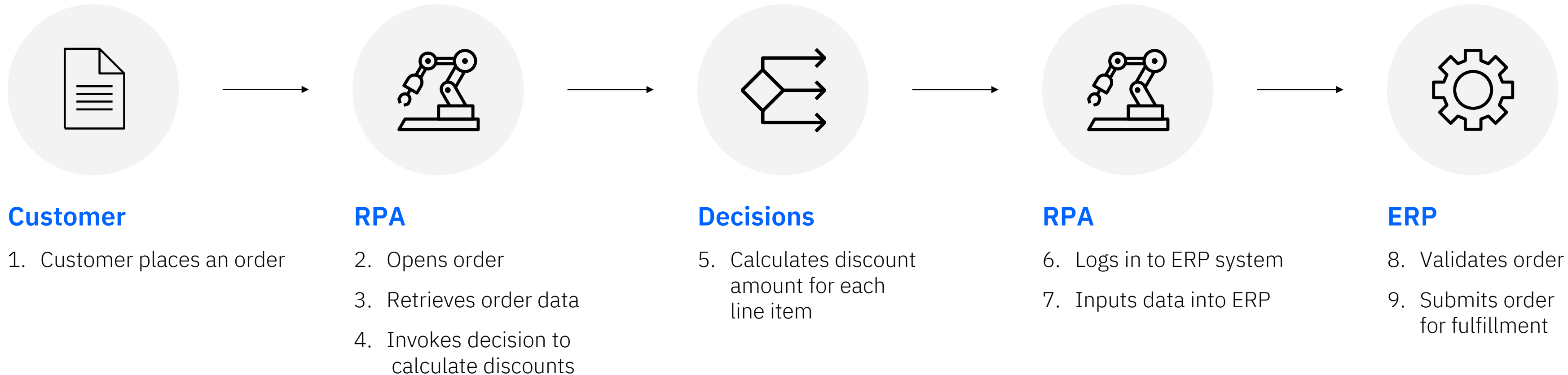
### Data capture extends the value of RPA by:

- Analyzing unstructured content to produce clean, structured data as required by RPA
- Eliminating or reducing the manual work required to interpret documents
- Minimizing exceptions
- Learning from corrections

# Get your bots to make better decisions faster

## Combining **decisions** with RPA

### Order entry use case:



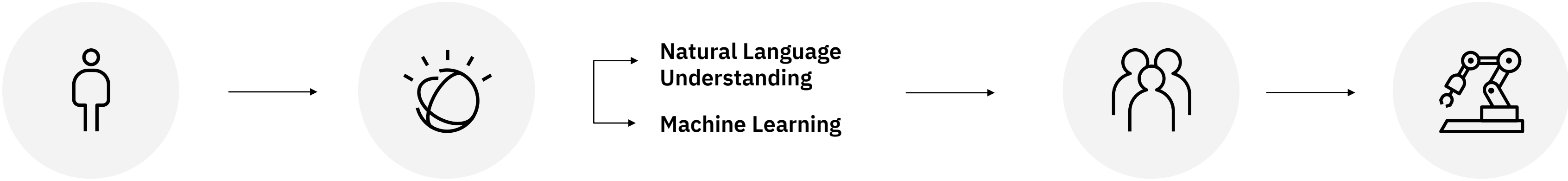
#### **Decision management extends the value of RPA by:**

- Managing and governing business decisions outside of RPA
- Enabling non-technical business users to maintain operational decisions
- Enabling business automation to be changed rapidly
- Reusing business decisions across the enterprise

# Bots can execute repetitive tasks based on AI-gathered insights

Combining AI technology such as ML, NLP with RPA

## Hiring use case:



### Hiring Manager

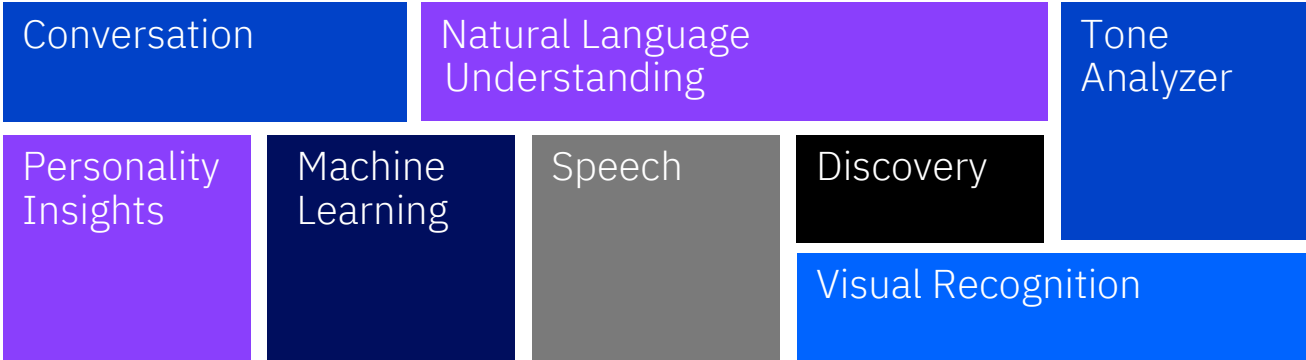
1. Opens up position

Hiring manager opens a new position and the system fetches candidates for that position.

### Artificial Intelligence

2. Extract keywords, concepts and categories/Predict profile

AI goes through the list of candidates and uses **“Natural Language Understanding”** to extract keywords, concepts and categories from the resume. It also uses **“Machine Learning”** to predict the best profile for the job.



### Human Resources

3. Select Candidate

User reviews the information gathered by Watson. User selects a candidate based on provided data.

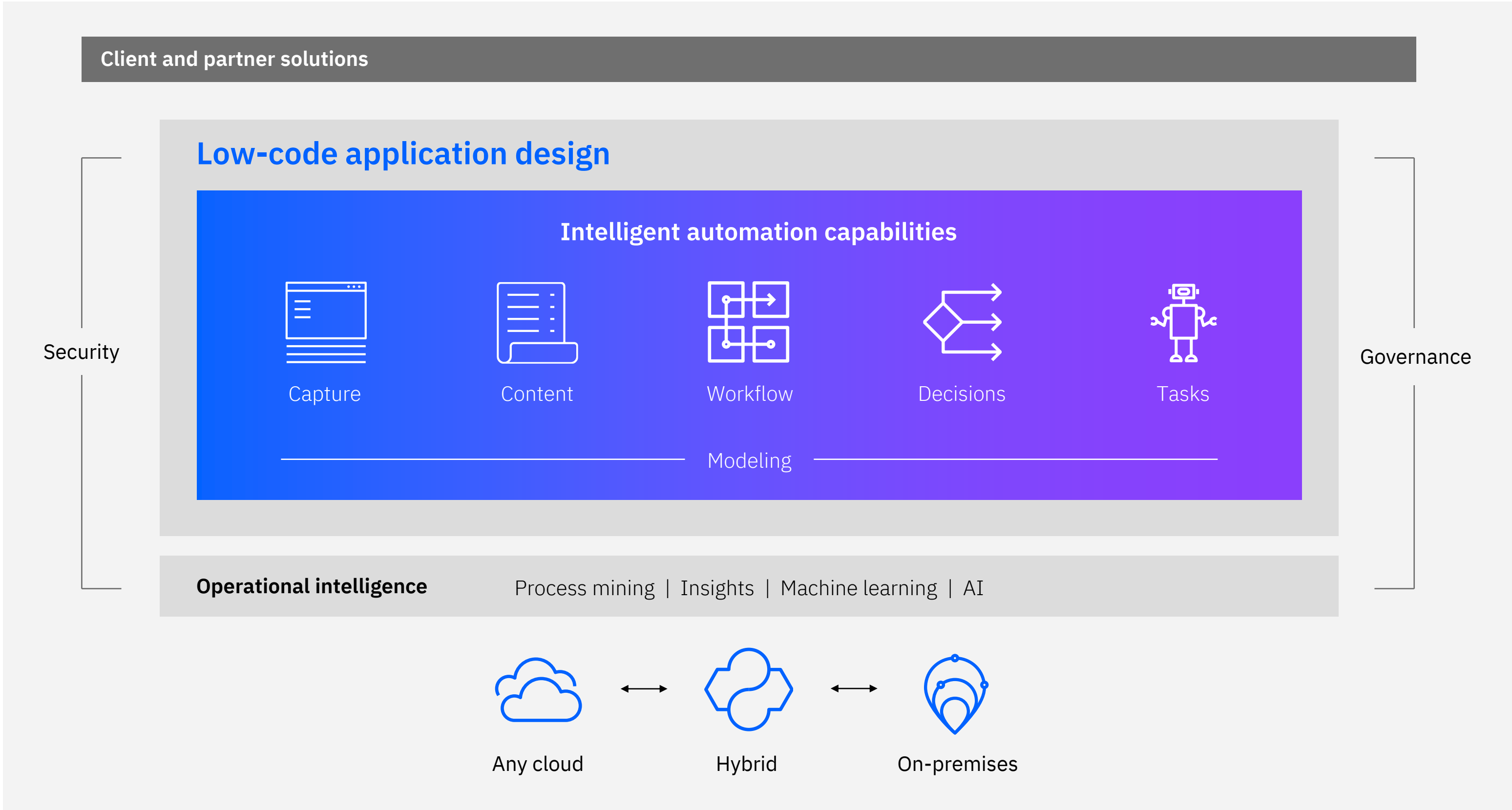
### Bot

4. Update backend systems

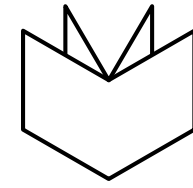
RPA updates the backend system once the candidate accepts the position.



# IBM Cloud Pak for Automation



# Next step: give RPA a try

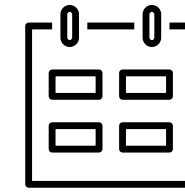


## Read no-hype RPA buyer's guide

Read this buyer's guide to learn:

- Where RPA fits in the automation landscape
- What it is and what it isn't
- Pros and cons of standalone RPA
- What level of automation is right for you
- How do you find the right RPA provider
- 7 steps to get started
- Not ready for the buyer's guide? Learn more about task automation

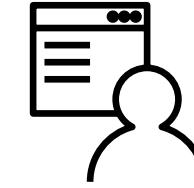
[ibm.biz/rpabuyerguide](https://ibm.biz/rpabuyerguide)



## Sign up for a free trial of IBM RPA

Get hands-on with the software to build attended and unattended bots and explore the other features of this RPA offering.

[ibm.biz/RPAtrial](https://ibm.biz/RPAtrial)



## Attend free self-paced RPA training

Learn how to use IBM Robotic Process Automation software through this series of self-paced courses. Ranging from basic to advanced, you will be walked through how to install the software and build bots.

[ibm.biz/RPAtraining](https://ibm.biz/RPAtraining)

# Part 2: IBM Robotic Process Automation

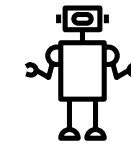
# IBM RPA features



**IBM Strength**

## Cloud software as a service

A full-featured cloud-based RPA software as a service solution enables organizations accelerate time to value. On-premises also available.



## Unattended bots

Use an RPA digital workforce to automate repetitive tasks without human intervention.



## Attended bots

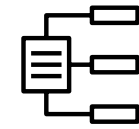
Enable your human workforce to augment work using bots to perform repetitive tasks on demand.



**IBM Strength**

## Integrated chatbots

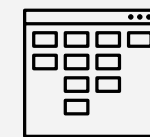
Combine chat and RPA commands to create intelligent virtual agents (IVAs) deployable on multiple channels to provide engaging client interactions.



**IBM Strength**

## Out-of-the-box capture

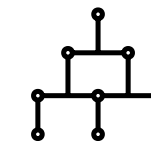
RPA commands for data extraction and classification, with built-in, best-in-class OCR. Expand to advanced use cases with intelligent capture from Cloud Pak for Automation.



**IBM Strength**

## Dashboards

Gain business insights into business operations.



**IBM Strength**

## Concurrent execution

Reduce cost of ownership by running multiple bots on the same virtual host.



**IBM Strength**

## Intelligent workload management

Intelligently distribute work across multiple bots to minimize bot idle time and optimize throughput.



**IBM Strength**

## Low-code editor

600+ commands with pre-built integrations to common applications (Outlook, Word, PDF, SAP, etc.) make it faster and easier to build bots.



**IBM Strength**

## End-to-end platform

RPA is included in IBM Cloud Pak for Automation so you can start small and scale, using only the automation capabilities that you need, when you need them.



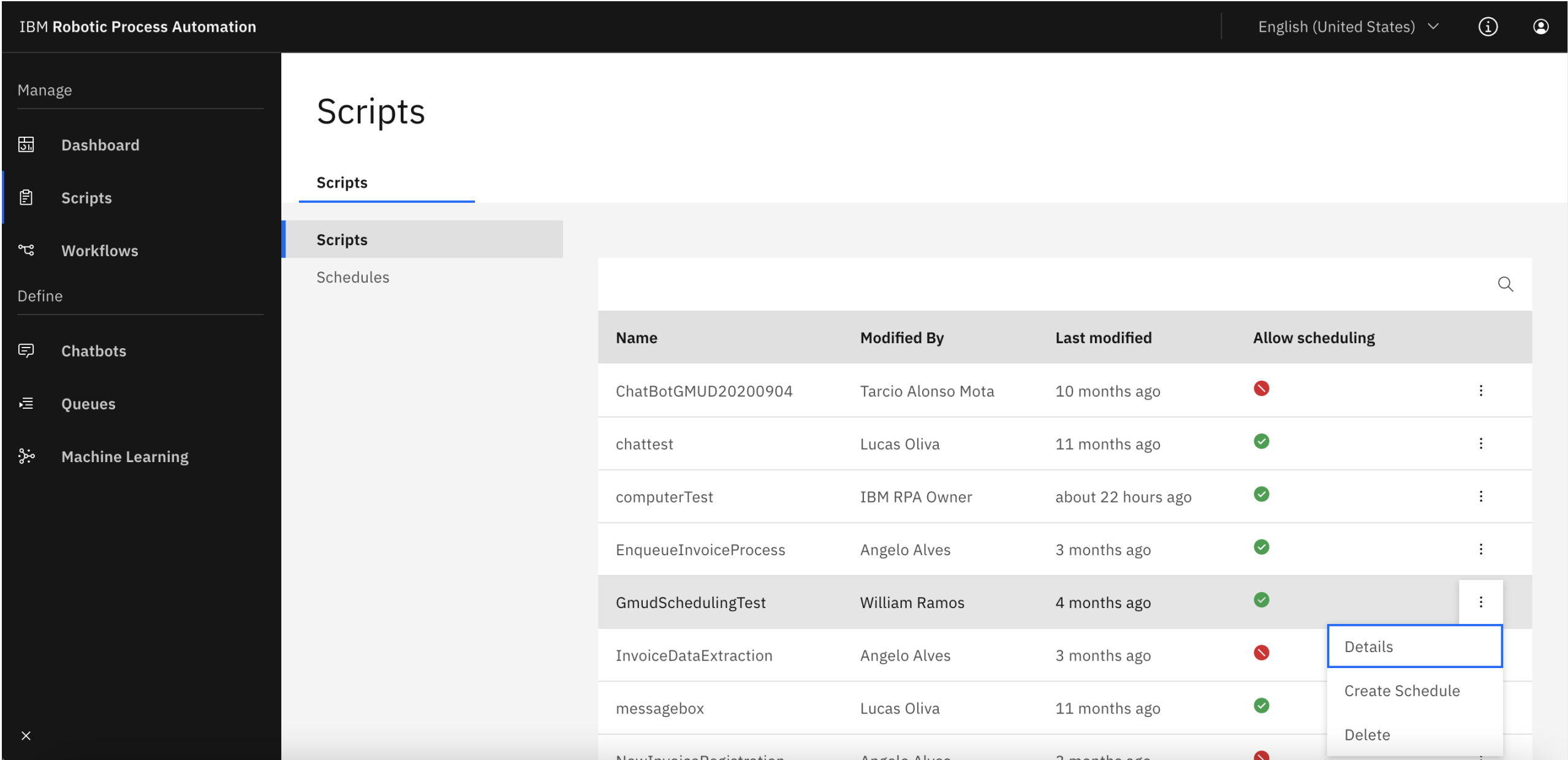
**IBM Strength**

## Native AI functionality

AI commands, including machine learning, decisioning and fuzzy logic, are available via the drag-and-drop interface so you can build bots that learn, think and reason.

# Carbon-X Styling

IBM RPA Server UI has been re-implemented using Carbon-X to provide IBM customers with a consistent user experience



# Globalization and Language Support

We're adding new languages with every release to enable RPA customers across the globe.

English

Portuguese

Spanish

German

Korean

Chinese (Simplified)

Chinese (Traditional)

French\*

Japanese\*

Russian\*

Italian\*

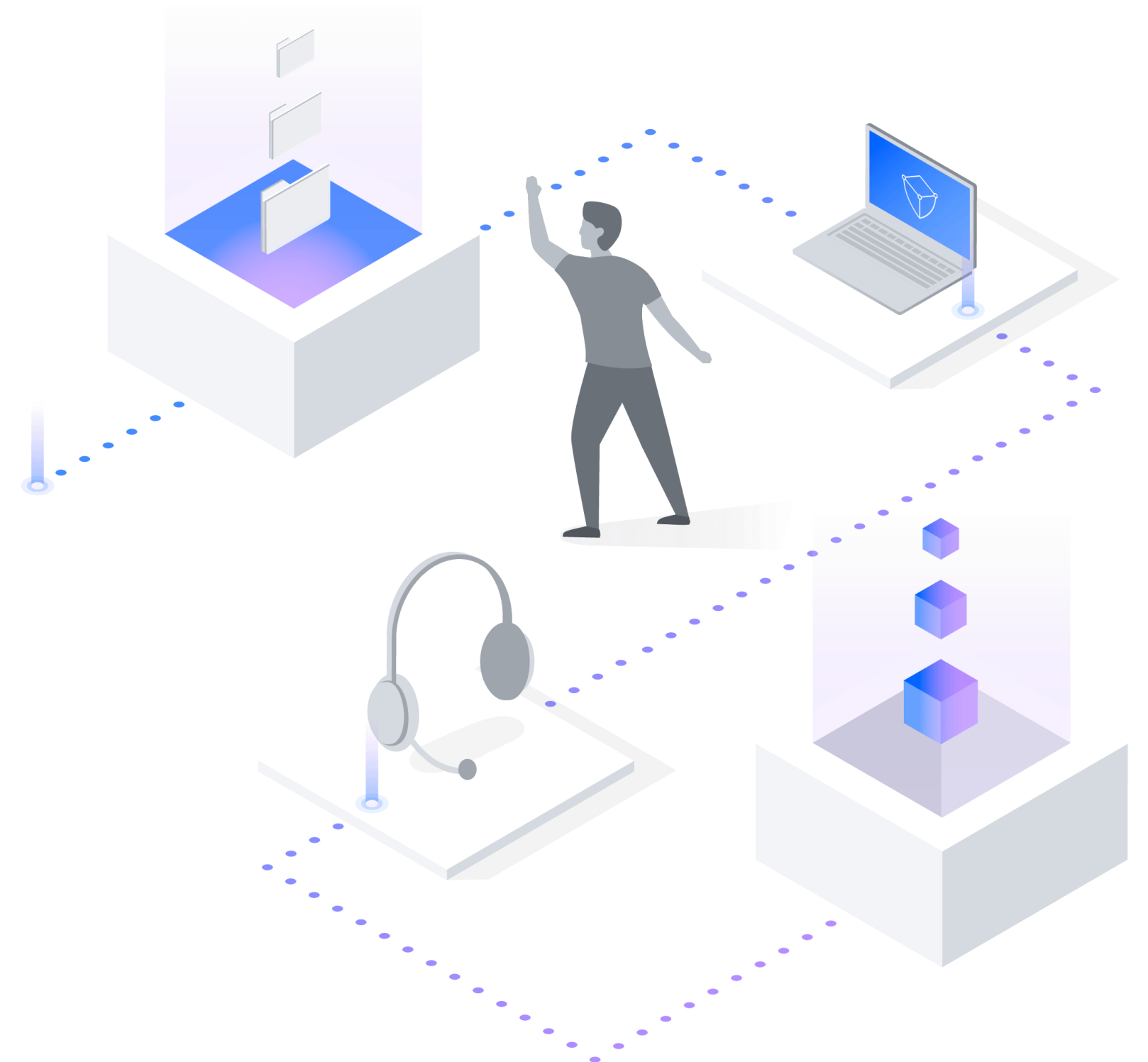
\* New languages added in IBM RPA 21.0.0



# Cloud native SaaS

A full-featured cloud-based RPA software as a service solution enables organizations to build attended and unattended software bots and accelerate time to value.

- Get started quickly with faster time to provision the infrastructure
- Managed cloud operations reduces cost of ownership with savings in both human resources and IT infrastructure
- New capabilities always available with frequent software updates







# Integrated chatbots and interactive voice response

## Chatbots for intelligent virtual agent (IVA) and interactive voice response (IVR) to provide engaging client interactions

- Built-in RPA chatbot commands
- IVR for voice synthesis and recognition
- Phone calls with E1 and VoIP (SIP)

The image displays two components of the IBM RPA Designer interface. On the left is a script editor showing a sequence of steps for connecting to a chatbot or IVR:

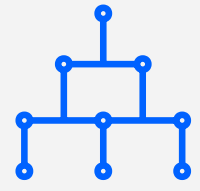
- 17 Connect to Chatbot or IVR  
*Connect Chat, using \${languageEn}, assigning Chat to \${chatInstance}*
- 18 Bot Says  
*Says the text Hi! I'm a Customer Service Bot. using the language \${languageEn}*
- 19 Bot Says  
*Says the text If you provide me a ZIP code, I'll return you with the city and state it references. using the language \${languageEn}*
- 20 Run Subroutine  
*Executes the routine AskAndSearchZipcodeAndAnswerUser*
- 21 Disconnect Chatbot or IVR  
*Disconnect*

Below the script editor are tabs for 'Script', 'Designer', and 'Call Graph'. On the right is a chat window titled 'uspsLookUpBasicChatbotPaulPachjolski.wal - Chat'. The chat history shows:

- Bot: Hi! I'm a Customer Service Bot.
- Bot: If you provide me a ZIP code, I'll return you with the city and state it references.
- Bot: Please, enter a ZIP code so I can search for it (numbers only).
- User: 90210
- Bot: The city and state for ZIP code "90210" is "BEVERLY HILLS CA".
- Bot: What is your request today?

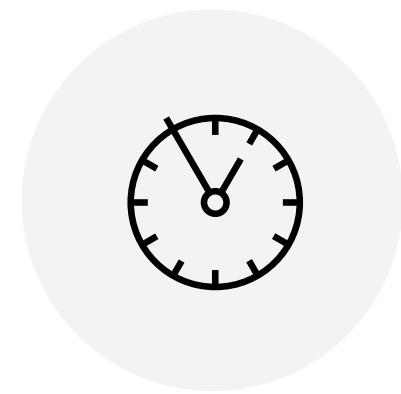
The chat window includes a text input field at the bottom with the placeholder 'Type your message...' and a send button.

Intelligent virtual agent (IVA) chatbots used to interact with customers and pass inputs directly to bots in order to perform automated interactions



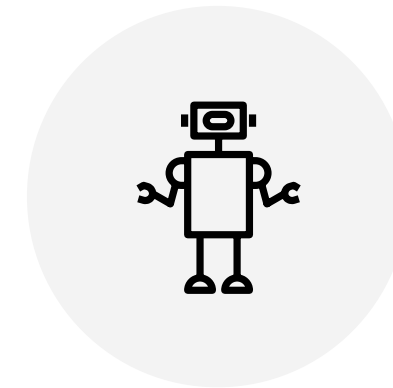
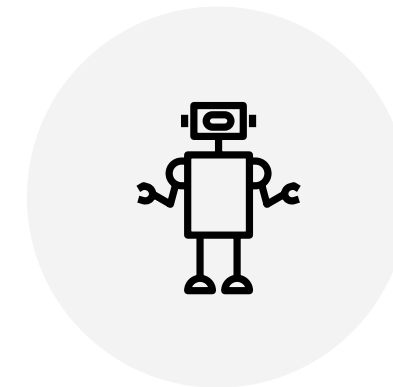
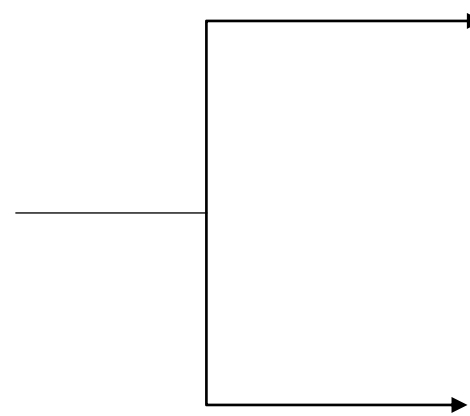
# Concurrent execution

- Scale by either deploying additional agents or by increasing the number of concurrent connections for an individual agent
- Depending on the task, you can run up to 100 concurrent connections per agent
- Having multiple bots executing on the same host can significantly reduce hardware, virtual machine, and operating system costs compared with other leading vendors



## Scheduling and workload management

Intelligently distribute work across multiple bots to optimize throughput.



## Agents

Each agent can be licensed with one or more concurrent connections to enable multiple bots to run concurrently with one bot running on each concurrent connection.

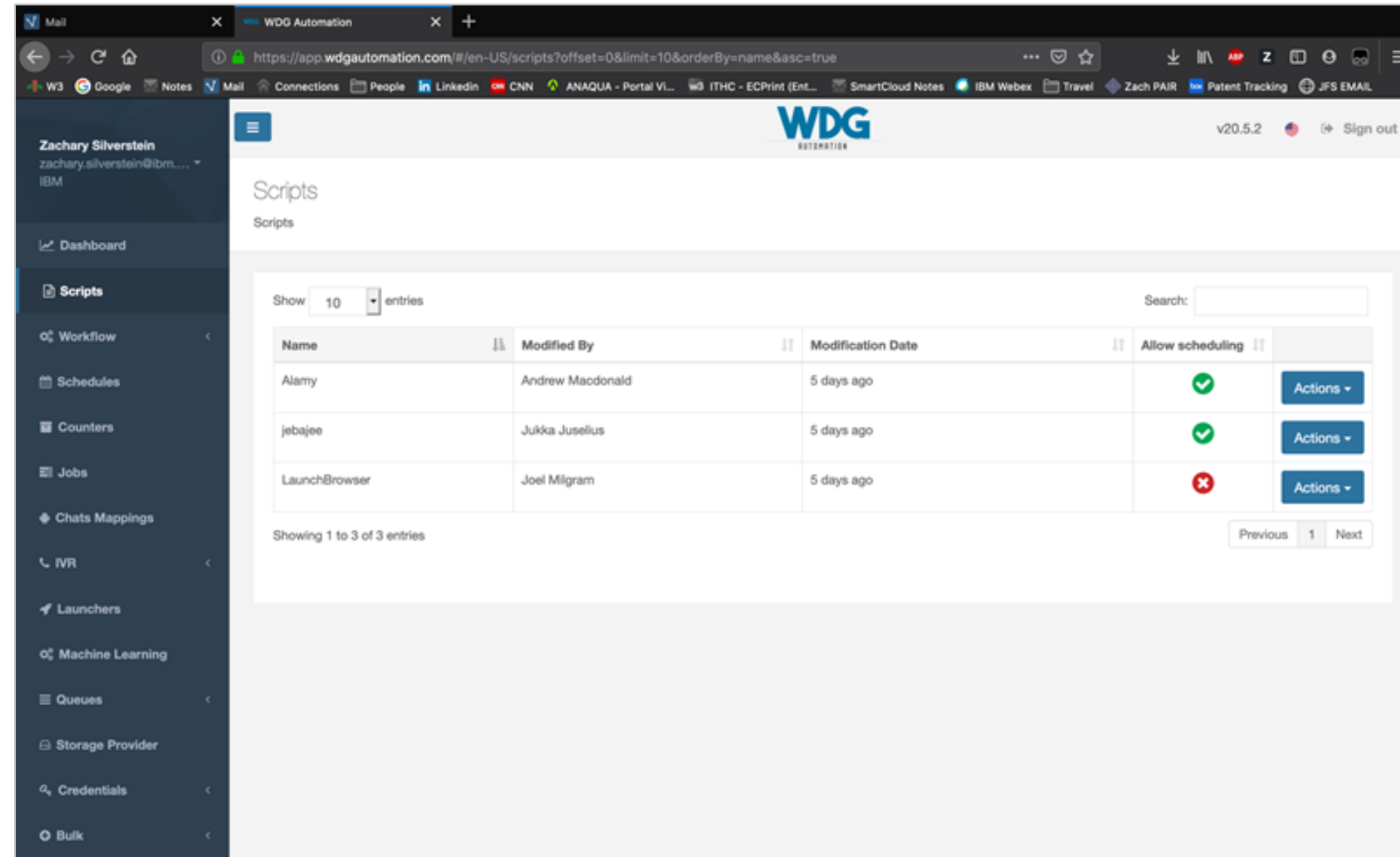


## Scheduler

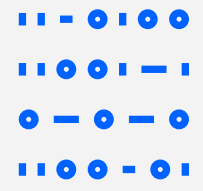
- The scheduler places a message in a queue, where each bot agent lines up and listens for the next job

## Workload management

- Queues come on a first-come, first-serve basis to ensure every bot receives work at the earliest opportunity and peaks in demand are handled by all available bots
- Intelligently distribute work across multiple bots to optimize throughput

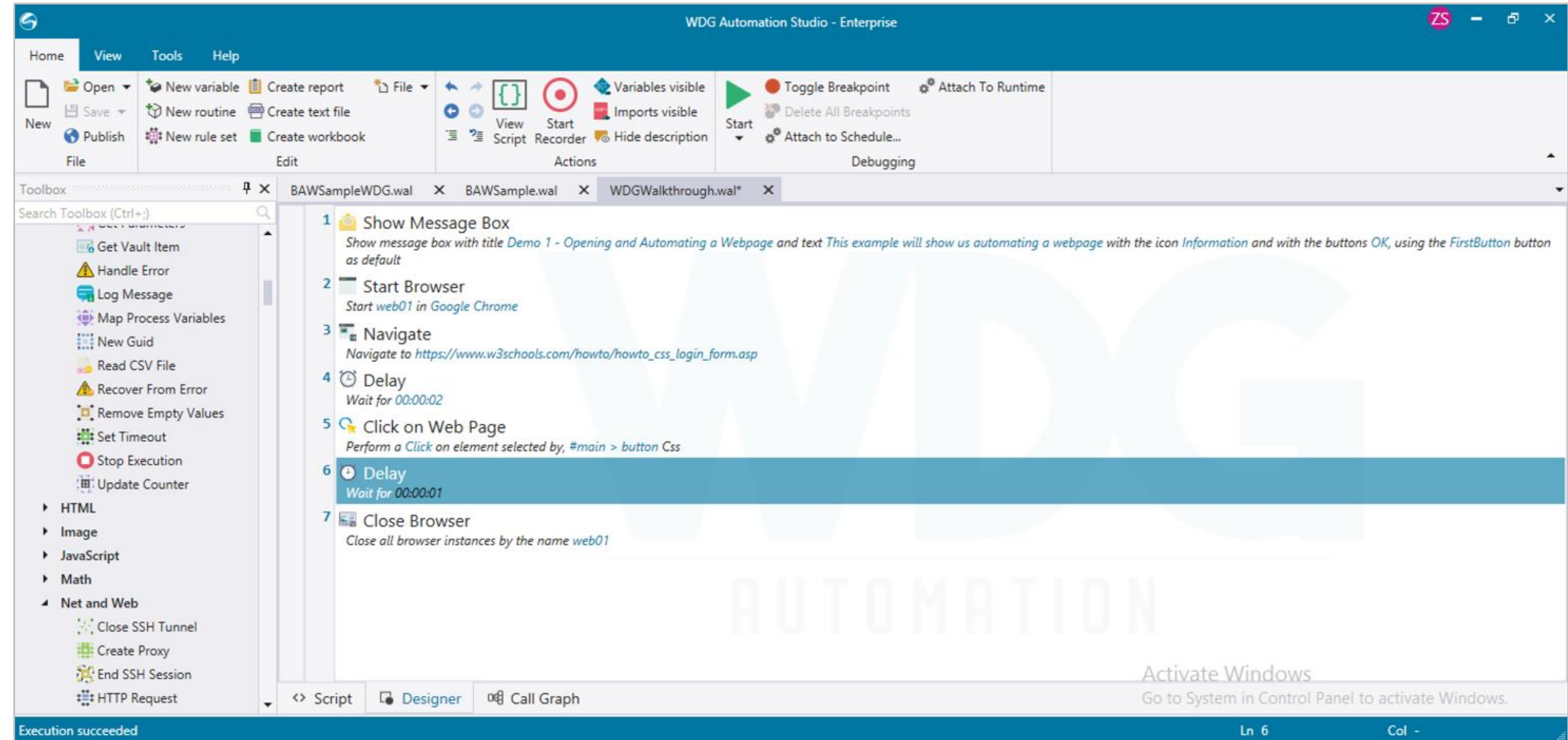


Browser-based interface to schedule bot, manage bot repository and access dashboards



## Easily build bots with low-code editors

- Record user interactions to automatically generate bot scripts
- Assemble bot scripts from hundreds of prebuilt commands
- Test automations directly from the bot studio



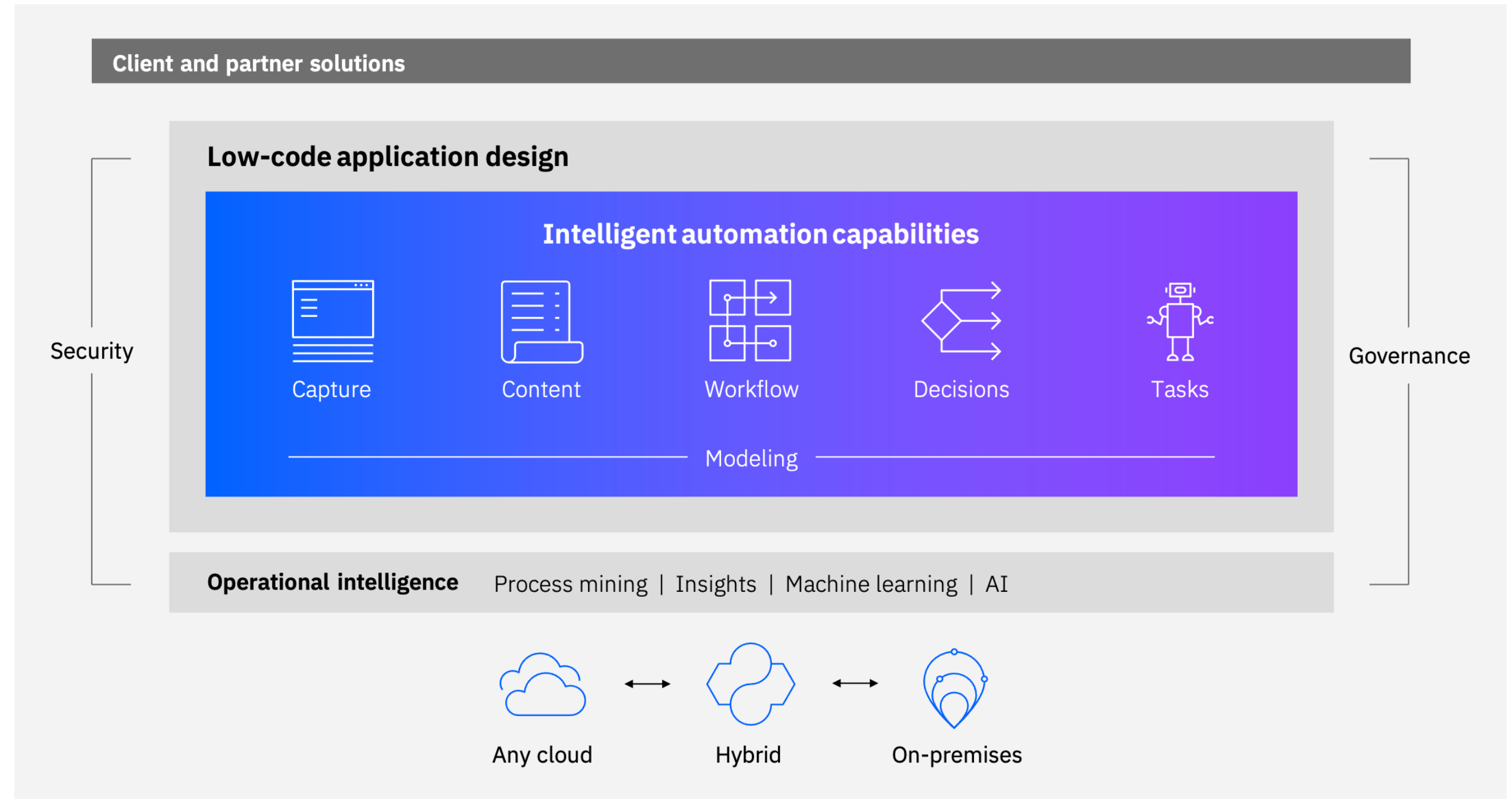
Graphical bot development capabilities include drag-and-drop of pre-built commands and ability to instantly step through and test bots



**IBM RPA is a core component of IBM Cloud Pak for Automation, a modular automation platform.**

Start small and scale—only use what you need, when you need it.

## IBM Cloud Pak for Automation



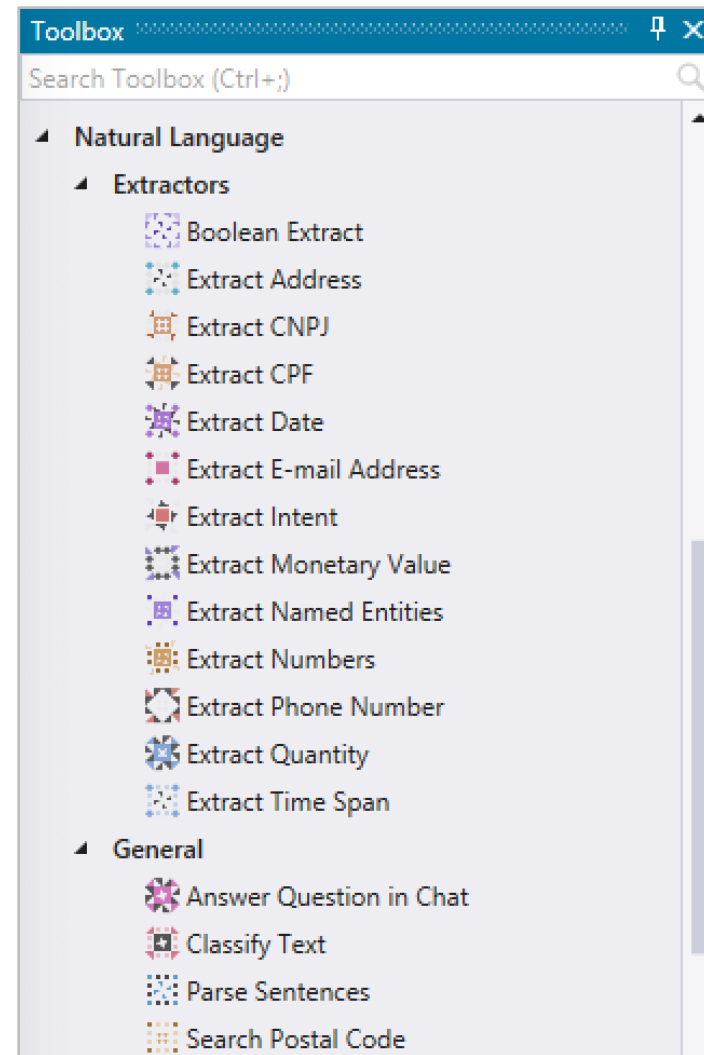




# Native AI functionality

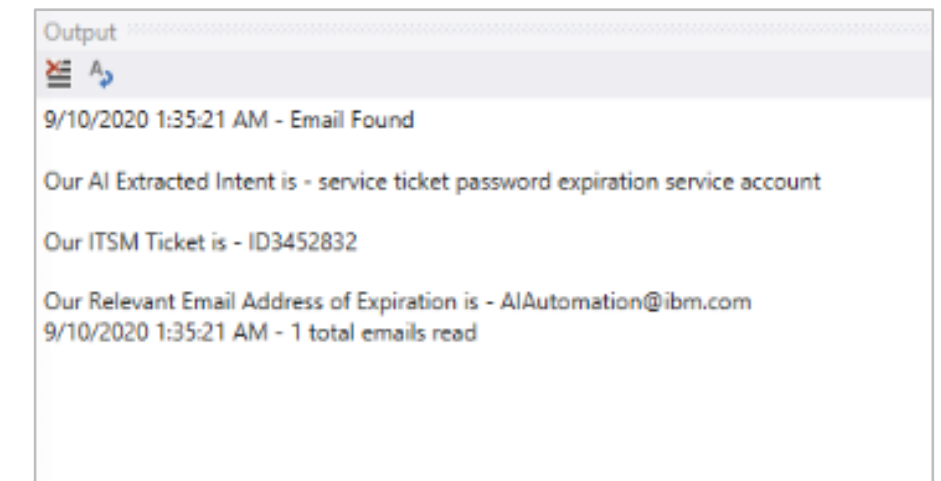
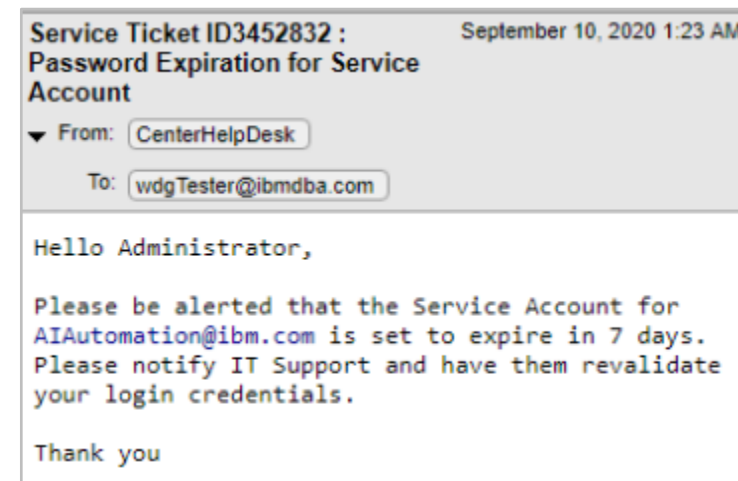
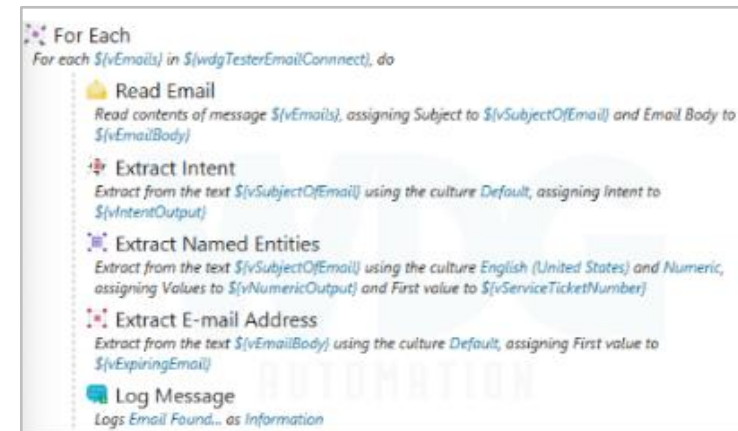
## Embedded AI within the application for functional usage within bots

- Embedded Natural Language Processing Extractors
- White-boxed AI Knowledge Base
- Out-of-the-Box Machine Learning Algorithms for OCR and Content Processing

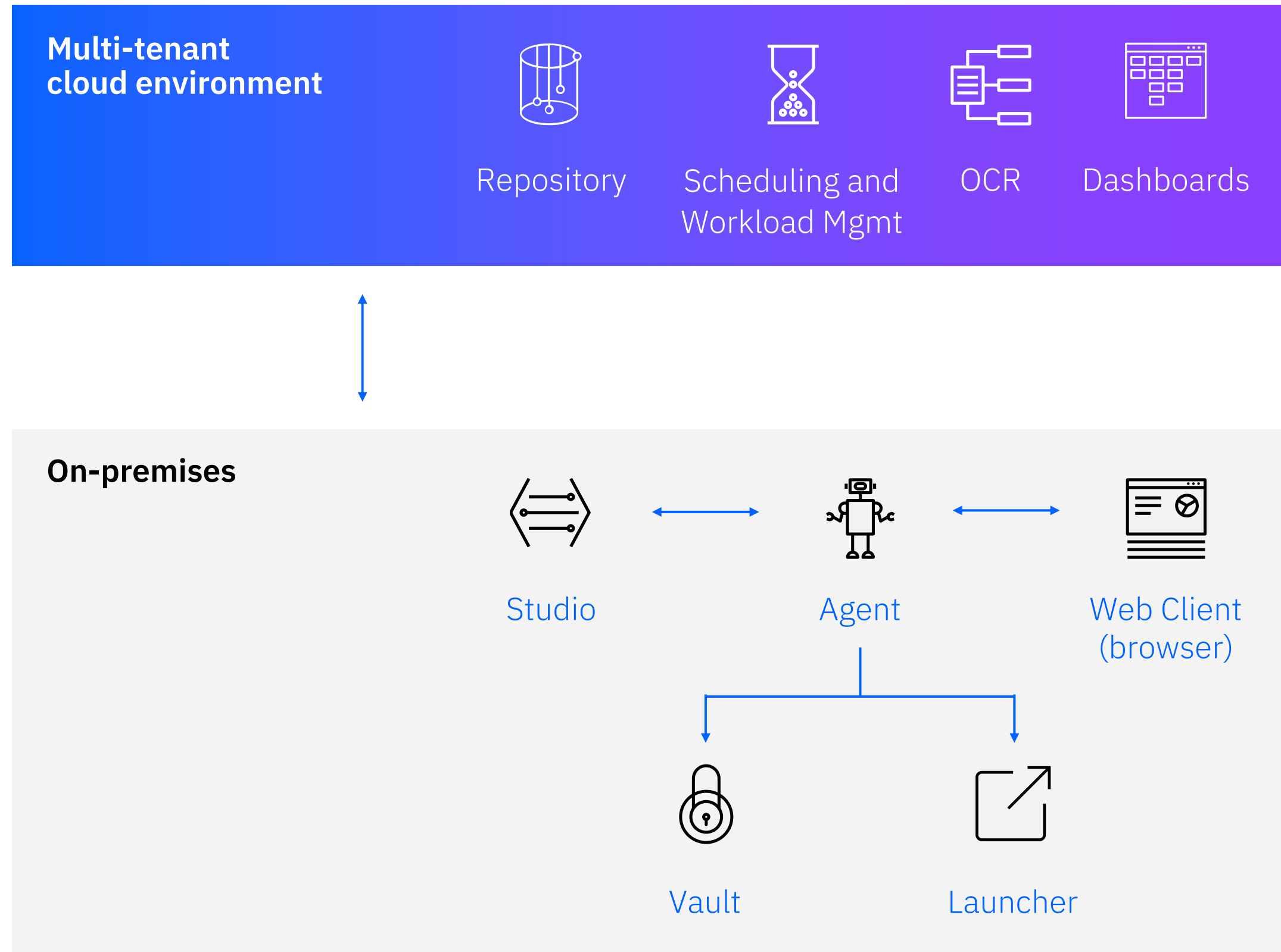


Natural Language Extraction Commands, Functional AI Commands, and transparent controllable knowledge bases

	A	B	C	D
1	Question	Answer	Context	Tags
2	Let me know who is requesting followup	Retrieving Followup	Followup Requested	+Followup
3	Who needs followup	Retrieving Followup	Followup Requested	+Followup
4	Who should we talk to?	Retrieving Followup	Followup Requested	+Followup
5	What customers want followup	Retrieving Followup	Followup Requested	+Followup
6	Who should we reach out to	Retrieving Followup	Followup Requested	+Followup
7	Who does not wish to be contacted?	Retrieving No Followup	No Followup Requested	+NoFollowup
8	Who does not want to be talked to	Retrieving No Followup	No Followup Requested	+NoFollowup
9	Who is not interested?	Retrieving No Followup	No Followup Requested	+NoFollowup

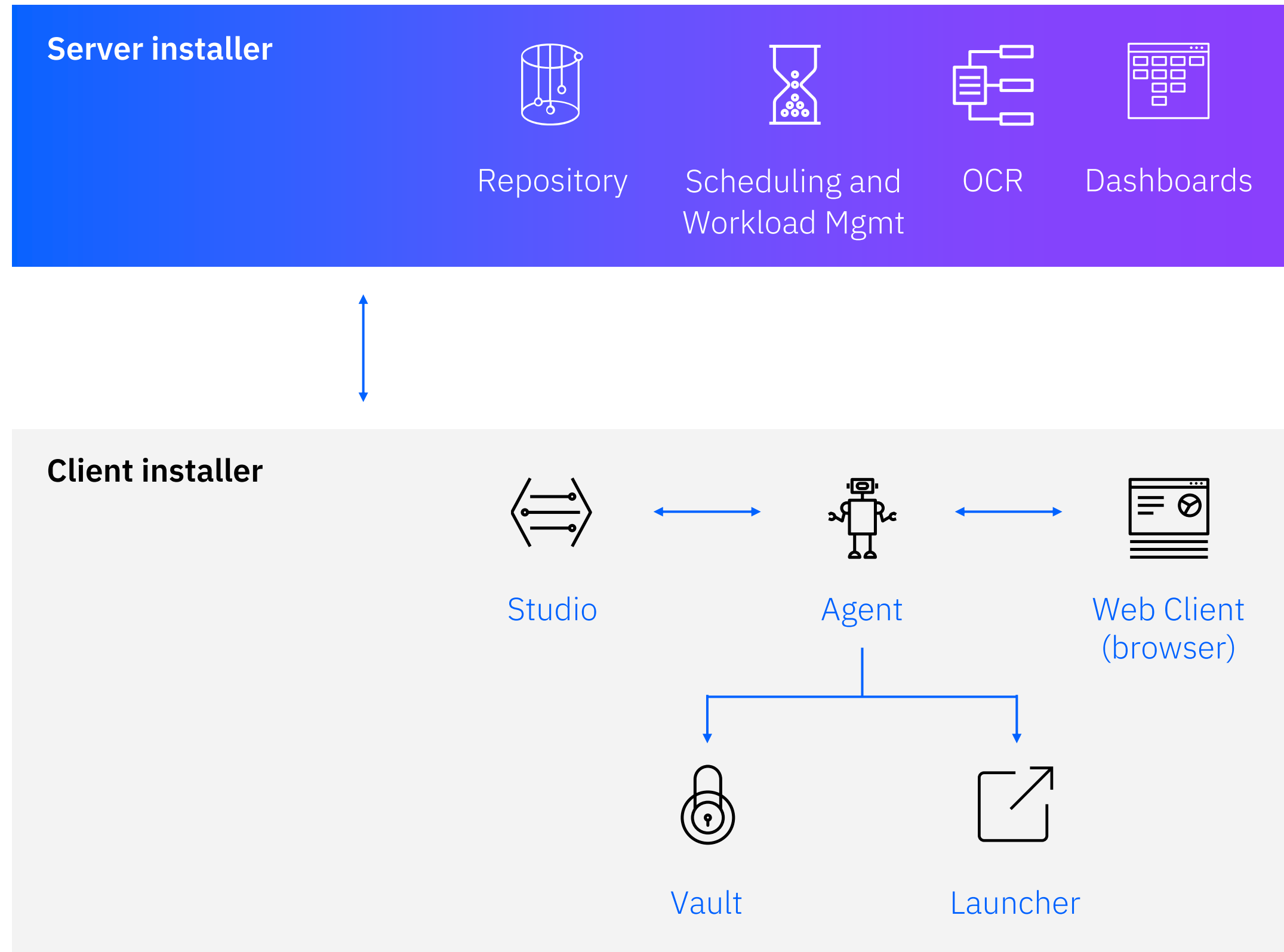


High level  
architecture:  
RPA as a service





High level  
architecture:  
RPA on-prem



# Deployment options



Multi-tenant cloud environment for the bot repository, scheduling and workload management, OCR, and dashboards.

On-prem enabling software, including Studio (bot builder), bot agents, desktop vault, and launcher.



On-prem environment includes client and server components for the bot repository, scheduling and workload management, OCR, dashboards, Studio (bot builder), bot agents, desktop vault, and launcher.

## Platform: Cloud Pak



Business Automation



Network Automation



Integration



Watson AIOps

# RPA on Red Hat OpenShift



## Cloud Pak Pricing Model

IBM RPA on-premise is included within Cloud Paks using metric conversion ratios

Cloud Pak	RPA Platform	RPA Attended	RPA Unattended	RPA Environment
<b>Business Automation</b>	1 install/ 2 VPC	5 concurrent connection/ 1VPC	1 concurrent connection/ 1VPC	1 virtual server/ 1 VPC
<b>Integration</b>	1 install/ 2 VPC	N/A	1 concurrent connection/ 1VPC	1 virtual server/ 1 VPC
<b>Network Automation</b>	1 install/ 28 RU	N/A	1 concurrent connection/ 14 RU	1 virtual server/ 14 RU
<b>Watson AI Ops</b>	1 install/ 168 RU	N/A	1 concurrent connection/ 84 RU	1 virtual server/ 84 RU

# RPA on Red Hat OpenShift



## Cloud Pak Entitlements

Each Cloud Pak includes different entitlements for the IBM RPA Platform

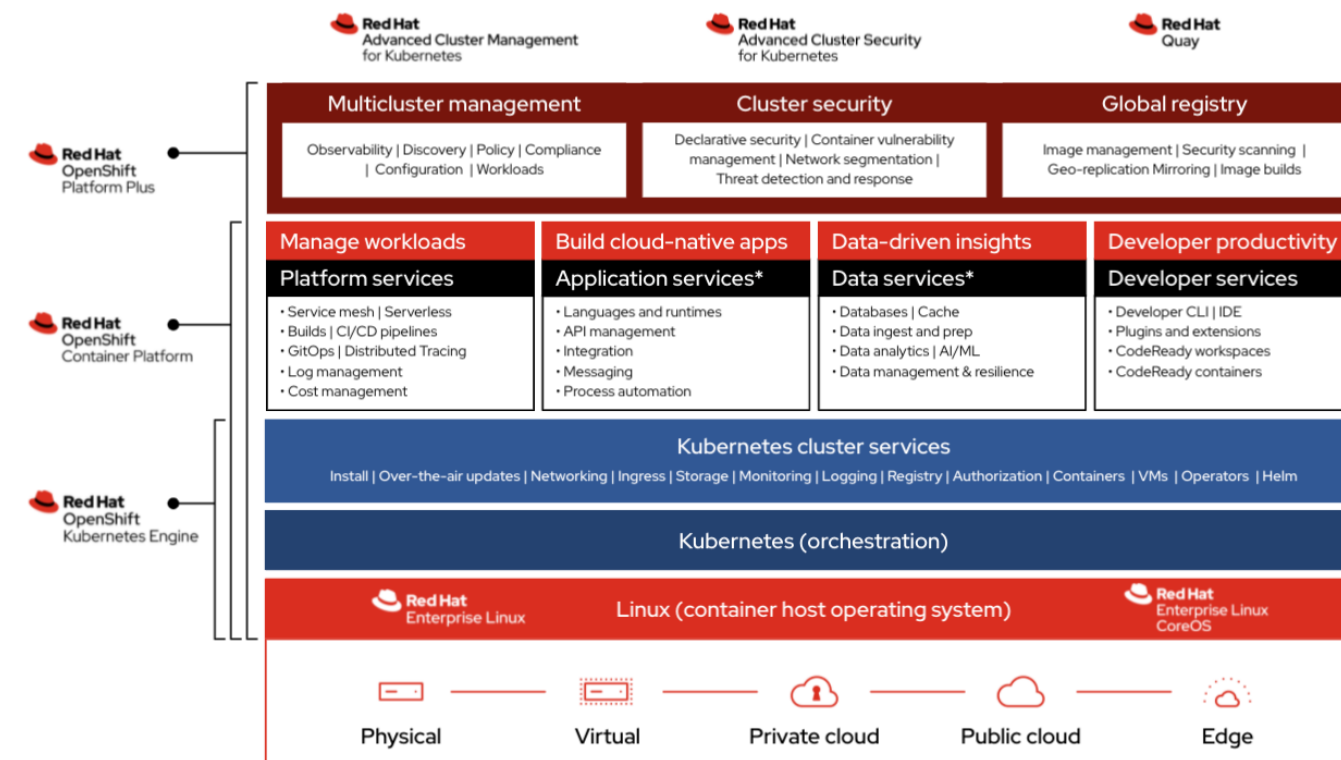
Offering	RPA Attended	RPA Unattended	RPA Environment
IBM RPA standalone	2	1	1
Cloud Pak for Business Automation	2	1	2
Cloud Pak for Integration	0	1	2
Cloud Pak for Network Automation	0	1	2
Cloud Pak for Watson AI Ops	0	1	2

# RPA on Red Hat OpenShift



## Benefits

OpenShift Container Platform simplifies and accelerates the development, delivery, and lifecycle management of hybrid applications



## Overview

<https://www.openshift.com/products/container-platform>

## Datasheet

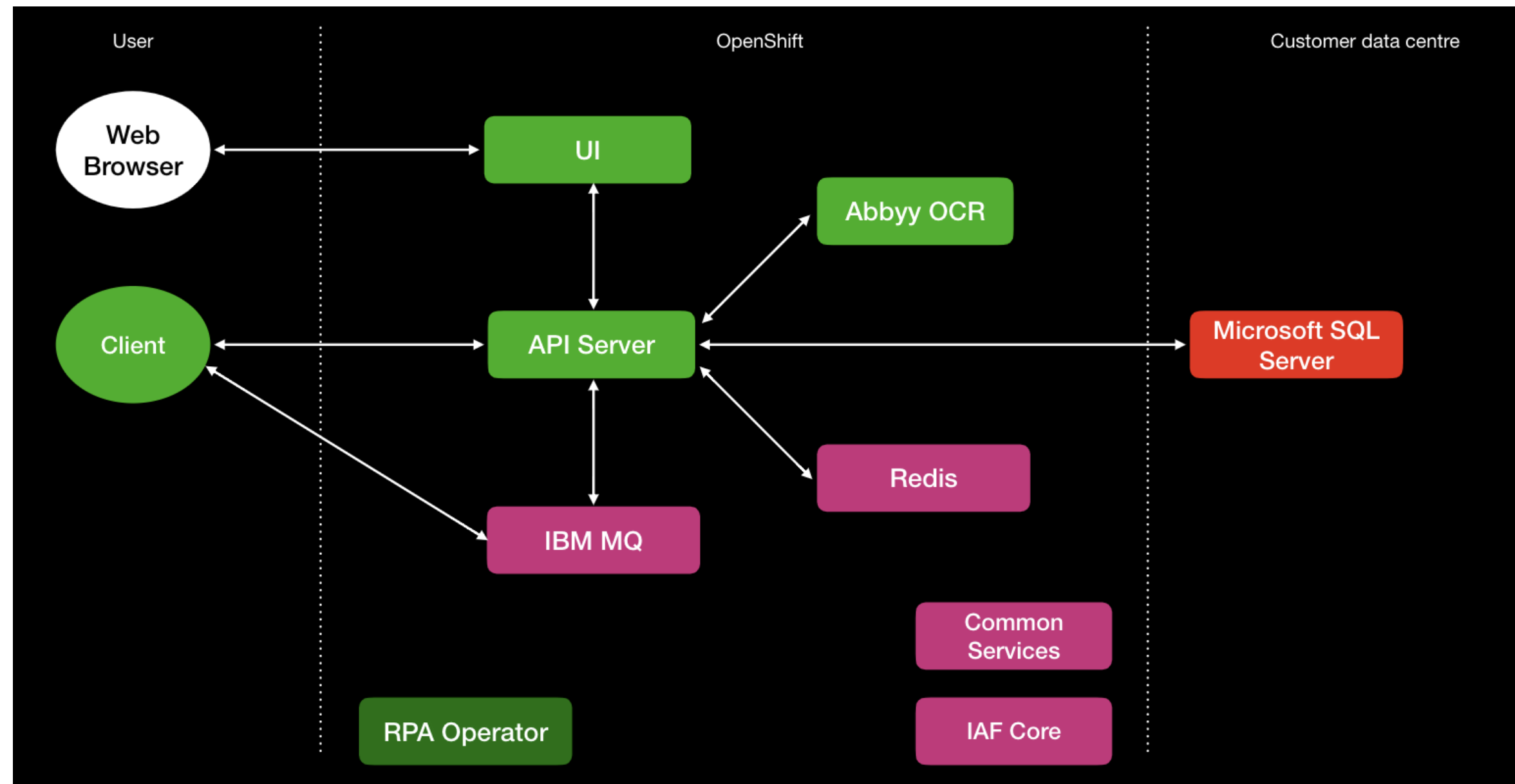
<https://www.redhat.com/en/resources/openshift-container-platform-datasheet>

# RPA on Red Hat OpenShift

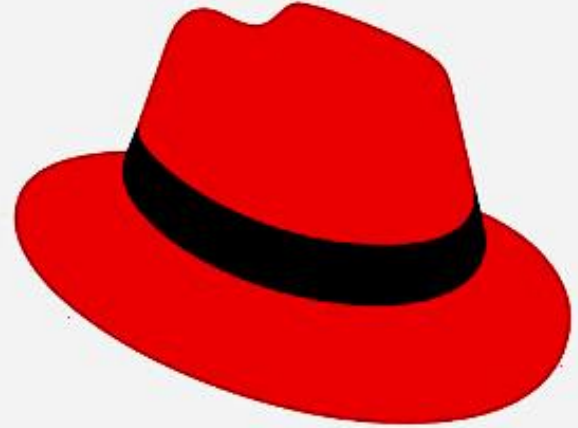


## Architecture

RPA Operator includes RPA UI, RPA API, MQ, ABBYY, Redis, Common Services and IAF Core



# RPA on Red Hat OpenShift



## Prerequisites

IBM RPA requires RedHat OpenShift, container storage and Microsoft SQL Server

Entitlements included within the RPA and CloudPak offerings...

Offering	Red Hat OpenShift Container Platform	Red Hat Container Storage	Microsoft SQL Server
<b>RPA Standalone on-premise</b>	No	No	No
<b>CPBA</b>	3VPC/1VPC	36TB (12TB usable)	No
<b>CPI</b>	3VPC/1VPC	12 TB	No
<b>CPNA</b>	No	No	No
<b>CPWAIOps</b>	200 VPC/ 1 RU + 1 VPC/121 RU	No	No

IBM RPA containers use Red Hat Universal Base Image (UBI) which does not require the customer to purchase any Linux licenses to deploy RPA



# RPA on Red Hat OpenShift



## Resources

An initial RPA install including all dependencies requires a 24 VPC OpenShift worker node cluster configuration

### Nodes:

3 worker nodes

### CPU:

8 cores per worker node

### Memory:

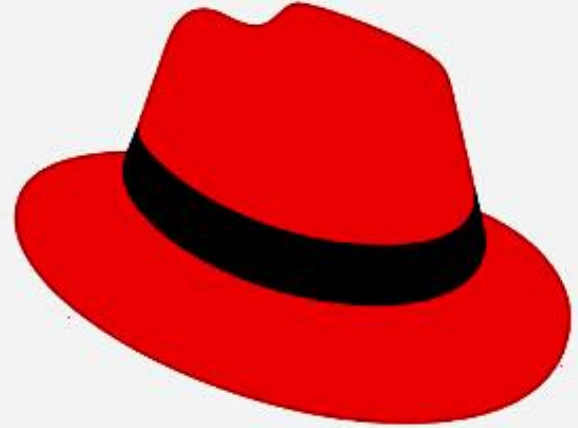
16 GB per worker node

### Disk:

250 GB per worker node

Name	Status	Role	Pods	Memory	CPU	Filesystem	Created	Instance
master0.iop199-qb.cp.fyre.ibm.com	Ready	master	22	5.26 GiB / 15.28 GiB	0.439 / 8 cores	12.9 GiB / 99.49 GiB	23 Jun 2021, 09:34	-
master1.iop199-qb.cp.fyre.ibm.com	Ready	master	49	8.59 GiB / 15.28 GiB	1.309 / 8 cores	10.58 GiB / 99.49 GiB	23 Jun 2021, 09:34	-
master2.iop199-qb.cp.fyre.ibm.com	Ready	master	33	7.93 GiB / 15.28 GiB	0.699 / 8 cores	10.82 GiB / 99.49 GiB	23 Jun 2021, 09:34	-
worker0.iop199-qb.cp.fyre.ibm.com	Ready	worker	45	6.69 GiB / 15.28 GiB	0.776 / 8 cores	25.74 GiB / 249.5 GiB	23 Jun 2021, 09:47	-
worker1.iop199-qb.cp.fyre.ibm.com	Ready	worker	46	10.39 GiB / 15.28 GiB	1.038 / 8 cores	20.87 GiB / 249.5 GiB	23 Jun 2021, 09:48	-
worker2.iop199-qb.cp.fyre.ibm.com	Ready	worker	53	9.62 GiB / 15.28 GiB	1.995 / 8 cores	27.01 GiB / 249.5 GiB	23 Jun 2021, 09:48	-

# RPA on Red Hat OpenShift



## Provision OpenShift

IBM RPA customers can download and install OpenShift Container Platform 4.x from Red Hat

- **IBM RPA Standalone on-premise customers must purchase OpenShift from Red Hat:**  
<https://www.openshift.com/products/pricing/>
- **IBM CloudPak customers can download and install OpenShift Container Platform using Red Hat Cluster Manager:** <https://www.ibm.com/docs/en/cloud-paks/1.0?topic=setting-up-openshift-container-platform-clusters>

# RPA on Red Hat OpenShift



## Install RPA

IBM RPA product documentation provides full details for accessing the RPA images and installing RPA Server on OpenShift

- Pre-installation requirements
- Known issues and limitations
- Supported architecture
- Accessing RPA images
- Air gap installation
- Operator dependencies
- Installing the RPA operator
- Configuring basic custom resource
- Storage configuration
- External database
- TLS certificates
- Validating a successful installation
- Accessing the RPA user interface
- Obtaining licensing information

NOTE: Customers access the IBM RPA container images from the IBM Entitled Registry, as described in the IBM RPA docs.

<https://www.ibm.com/docs/en/rpa/21.0?topic=installing-openshift-container-platform>

# RPA on Red Hat OpenShift



## License Service

Customers can access the RPA license usage report using either the CloudPak License Service APIs or CloudPak Admin Hub UI

- IBM CloudPak Foundational Services provides documentation about the License Service: <https://www.ibm.com/docs/en/cloud-paks/1.0?topic=services-license-service>
- IBM RPA reports include non-core metrics for concurrent connections and environments, so customers will need to calculate equivalent CloudPak metrics based on their RPA entitlements: <https://www.ibm.com/docs/en/cloud-paks/1.0?topic=service-reported-metrics>

# IBM RPA has helped organizations improve customer satisfaction and reduce manual work

Create efficiencies

**10**  
hours per day

Number of hours saved from employees manually inputting new client data



Improve customer satisfaction

**90%**  
reduction

Faster time delivering services has improved customer satisfaction



Reduce manual work

**3**  
FTEs

Employees reassigned to more strategic activities instead of processing invoices







A gente  
distribui  
confiança







# How could GAM reassign employees to higher-value work while cutting costs?

Improving customer service is a challenge for any supply chain management company. This was true for [GAM Distributors of Medicines and Perfumery](#), which supplies over 13,000 products to more than 17,00 customers. GAM wanted employees to spend more time assisting customers and less time on repetitive tasks. Using [IBM Robotic Process Automation](#) technology, the company automated 22 processes in 12 months and saves approximately BRL 120,000 per year.

Hybrid Cloud  
Consumer Products

Saves approximately BRL 120,000 per year by automating manual and repetitive tasks

*Staff have moved from being wary about the bots to embracing them. They have more time to do higher value work. Plus, they can use the bots to develop solutions for day-to-day problems, which makes work even more fulfilling.*

Lucas Remor  
Process and Project Coordinator, GAM  
Distributors of Medicines and Perfumery

## **Solution Component:**

IBM® Robotic Process Automation

[Read the full story](#)







Hybrid Cloud  
Insurance

# How do you turn automation skeptics into supportive stakeholders?

Automation offers amazing benefits. But the automation journey can be daunting. There are many product options to choose from. And choosing your automation service is only part of the challenge. You won't get very far without the support of your teams, who may view bots with mistrust and skepticism. [Lojacorr Network](#) understood this and brought its people along on the journey. With them and [IBM Robotic Process Automation](#), the company increased efficiency by 80% and helped its staff focus on more important matters.

The processing and notification of more than 700 payments per day.

*RPA allows gains in efficiency at a very large scale. With faster access to information and greater data reliability and operational efficiency, automation is a strong ally for companies.*

Sandro Ribeiro  
CIO, Lojacorr Network

### Solution Component:

IBM® Robotic Process Automation

[Read the full story](#)





# How can a global consultancy track worldwide shipments without a keystroke?

[Read the full story](#)

Hybrid Cloud  
Wholesale Distribution & Services

Our pizzas are automatically tracked from the moment they're ordered to the second they hit the doorstep, but tracking large international shipments from one country to another required manual, human-powered processes that fell far short. [Inter Aduaneira](#), a worldwide shipping consultancy, used the [IBM Robotic Process Automation](#) (RPA) solution to make shipment tracking as easy as, well, ordering a pizza.

Instead of entering data, skilled analysts now use their talents to create better customer relationships.

*Digital transformation is not immediate; it's a whole journey to be planned.*

Breno Palhares  
CEO, Axxin

**Solution Component:**

IBM® Robotic Process Automation





# Could Cobmax reduce repetitive tasks and overtime costs without limiting growth?

[Read the full story](#)

Enabling growth is critical for most businesses. But growth is often hampered by time-consuming manual tasks, mistakes and employee costs. [Cobmax Sales Center](#) faced this challenge after winning a new contract. By working with IBM to implement [IBM Robotic Process Automation](#), the company now produces accurate customer reports in half the time, or less. It also reduced back-office operations by 50%, which allows more staff to work in strategic, growth-supporting positions.

Hybrid Cloud  
Professional Services

Client reports that used to take two or three days to run now take one day and are more accurate.

*In 2016 we started with a little seed. We had only one process to improve, a simple cut and paste. Today, we have a team of five developers, a technical leader and a process owner inside Cobmax, hired by us, and we are automating a wide range of processes.*

Alexandre Voltan  
Innovation Manager, Cobmax Sales Center

**Solution Component:**  
IBM® Robotic Process Automation







# How can you free up time for employees to do more creative work?

[Read the full story](#)

Hybrid Cloud  
Financial Markets

With many employees tied up with important but repetitive tasks, [Credigy Solutions, Inc.](#), a rapidly growing specialty finance company, needed a solution that could carve out more time for analysts, strategists, statisticians and other professionals to focus on innovative, high-value work for its clients. By using [IBM Robotic Process Automation](#) software, Credigy automated over 25 processes, such as due diligence and invoice processing, with RPA robots and plans to grow to 100% process automation.

In the first year of deployment, Credigy automated over 25 repetitive back-office tasks using IBM RPA robots.

*From the beginning, our strategy and messaging has always been centered on a human and robot partnership that brings the best total value to Credigy. For this reason, everyone has bought into RPA technology.*

Rebecca Sims  
Senior Business Systems Analyst,  
Credigy Solutions, Inc.

## **Solution component:**

IBM® Robotic Process Automation





# How can automation accelerate the preparation of key management reports?

[Read the full story](#)

With significant professional staff resources tied up for days to prepare management reports using spreadsheets, [Deloitte](#) sought faster alternatives. By deploying [IBM Robotic Process Automation](#) software, Deloitte was able to produce a range of key reports in a matter of minutes instead of days, while also reducing errors stemming from manual entry. Professionals freed from repetitive reporting tasks now have more time to serve clients and work on more value-added assignments.

**Hybrid Cloud**  
Professional Services

Automating the preparation of the monthly management report freed up five professional analysts to work on more high-value assignments.

*RPA is an inexpensive way of improving productivity and improving the quality of the systems while also freeing time to focus on more high-value activities.*

Martin Seefelder  
Robotic and Cognitive Process  
Automation Leader, Deloitte-Brazil

**Solution component:**  
IBM® Robotic Process Automation







# Keeping and enhancing its competitive edge in the market with IBM® Robotic Process Automation

[Learn more](#)

## Business Challenge:

As a company whose core business is to help develop and support Brazilian companies that are interested in setting up operations in the United States, Grupo Domini handles several portals and systems. It thus needed a system that would help monitor all legal and accounting processes that came with operations such as this.

## Solution:

Grupo Domini chose IBM Robotic Process Automation to address its challenges. With the RPA solution, it automated access to the various portals and systems that allow companies that hire expansion projects to achieve more reliable and agile decision-making processes, especially in the U.S.

## Outcome:

- High-demand, repetitive tasks are now automated to provide more reliability and agility for the future
- Decisions are now tailored to each scenario and business
- Improved customer service and helped increase its competitive edge in the market

*"Using the digital RPA solution is a major evolution that allows us to increase our productivity, provide more reliable information, improve customer service and become more competitive in our market."*

**Cleoncio Souza**  
President  
Grupo Domini

## Solution Components:

- IBM® Robotic Process Automation





# IBM® Robotic Process Automation helps improve company's market position

[Learn more](#)

## Business Challenge:

Known for its highly specialized tax law services, Coimbra & Chaves Advogados wanted to implement efficient and speedy organizational processes for its projects. It dealt with a significant amount of information and data that made it prone to errors and issues. It needed an efficient system to better manage the follow-up of judicial decisions. It had also been spending a lot of time adjusting accessory obligations and delivering tax refund requests to customers. The client sought to address these challenges through automation.

## Solution:

The client chose the IBM Robotic Process Automation solution to tackle its challenges. The firm currently has 25 smart robots working 24 hours a day, 7 days a week in processes related to Accessory Obligations and delivering tax refund requests to customers, monitoring the rulings of the Superior Chamber of the Administrative Council for Tax Appeals (CARF), and to offer additional new services. The solution served to map documents to respective cases, helping make these steps faster and more reliable.

## Outcomes:

- Optimized operations to make them faster and more reliable
- Increased efficiency and speed of their organizational processes
- Improved the company's market position in just six months of implementation
- Achieved a 90% reduction in the time spent on adjusting Accessory Obligations and addressing customer requests for tax refunds

*"Even though we only recently started using the solution, we can easily say that our partnership is a success. The tools are incredibly easy to use, and have allowed us to save a significant amount of time in completing the tasks that were automated. In addition, some of the new services offered by the firm can only be done using WDG Automation, which shows how satisfied we are with the project,"*

**Fabiano de Almeida Rodrigues**  
Counseling Partner, Coimbra & Chaves Advogados

## Solution Components:

- IBM® Robotic Process Automation







# Transforming invoice processing with IBM® Robotic Process Automation

[Learn more](#)

## Business Challenge:

Being a successful law firm meant that Lobo de Rizzo managed a large client base. It used to run its invoice management process rather inefficiently in that its financial department issued different invoices for each of its processes, resulting in a high volume of invoices issued manually, overloading the staff with repetitive tasks for each of its clients daily. It looked to replace this error-prone process with a more efficient, reliable one.

## Solution:

The client chose the IBM Robotic Process Automation solution to automate its invoice management processes. The financial department automated its tasks with the implementation of 2 robots that operate 24 hours a day. These two robots perform manual and repetitive work equivalent to three employees, who have since reallocated to more strategic and non-repetitive activities.

## Outcomes:

- Significantly reduced operational costs
- Increased productivity
- Helped reallocate employees to more strategic and non-repetitive tasks
- Scaled robot deployment to meet new demands.

## Solution Components:

- IBM® Robotic Process Automation





# Embarking on a radical digital transformation journey with IBM® Robotic Process Automation

[Learn more](#)



## Business Challenge:

With a digital transformation journey in mind, the bank decided to implement the IBM RPA solution. For this to be successful, implementation had to be done incrementally and collectively, with everybody's buy-in, as it would bring about sweeping changes to how it functioned as an organization. An added challenge was the forging of a new culture focused on using technology across every department.

## Solution:

Being a union with several branches, each belonging to a different cooperative, the client started creating robots in one cooperative before scaling it to the others. Several cooperatives used the same codes and the same technology, helping with scalability gains and, over time, to standardize technology enterprise-wide. Being very focused on the digital onboarding process to make it easy for members to join the union, it automated several onboarding processes using the IBM RPA technology.

## Outcomes:

- Helped earn 19 FTEs, meaning savings worth the manhours of 19 full-time employees
- Realized ROI of 1:3 in the first month of operation
- Digital onboarding of new members- registering and opening an account is much faster and takes much less time since the implementation
- Deployed robots in the HR & Credit Recovery departments, making these processes agile, fast, and free of errors
- It saw significant scalability gains

## Solution Components:

- IBM Robotic Process Automation



# Customer success story: Claro case study

## Regulated Customer Service

Telco customers can open a complaint with the regulatory agency through a government-provided portal. Complaints must be handled according to SLAs per the regulatory agency, and failure to do so results in fines.

CSRs needed to juggle between this portal and Salesforce, since the request was handled internally on Salesforce, but the two systems needed to be kept in sync.

The entire process was automated and today all complaints are managed only through Salesforce.

## Tax Recovery

Every time customers ask for a refund, Claro must be refunded on taxes it paid upfront as well. With 40M refund requests to process and deadlines approaching, there was no other way to do it without automation.

This was one of our most successful projects, in which customer payback happened in 15 minutes after bots started to run.

## NBA/NBO

It is common to receive calls from telco customers wanting to resolve an issue, change their subscriptions or even to cancel them. The process to help customers over the phone is time consuming as it requires looping through different systems and combing through data and processes to define what the Next Best Action or Next Best Offer to a customer should be.

Upon implementing Salesforce, Claro wanted this process to be automated as well. Claro deployed hundreds of IBM RPA bots to augment CSRs in real-time by providing NBAs/NBOs to customers over the phone.

## Backoffice Automation

When customers open service tickets, there are always actions that must take place on many different systems for these requests to be fulfilled.

In one particular back-office cell with over 300 people, Claro deployed tens of bots that were able to understand and process these requests, reducing the back-office headcount to 40, relocating these people to other functions. This increased customer satisfaction while reducing costs.



# Partner Ecosystem

## Giving customers choice with business partner and IBM led engagements

### IBM

- Primary support of the IBM RPA product is provided by IBM
- IBM has a global presence, operating in more than 175 countries
- New business is driven by IBM digital sales or IBM direct sales
- Services are provided by IBM RPA lab services and IBM global business services (GBS)

- ✓ The aim is to teach customers to become self sufficient and develop RPA solutions for themselves
- ✓ Different services offerings are provided for customers at different stages of their RPA journey

### Business Partners

- Most business partners combine sales with delivery services and develop assets to accelerate migration and development of customer projects
- Extending our reach with 60K+ active partner ecosystem spanning 190+ countries
- Multiple types of partner, including systems integrators, independent software vendors, resellers, and OEM's

# Direct / Indirect Sales Channel and Partner Updates

Elevating our ecosystem as an engine for growth

Helping our partners capitalize on hybrid cloud and unlock the power of AI.

IBM is deepening our investments and sharpening our focus on partners with:



Build



Service



Sell

**The support you need to get to market and go to market your way**

- Simplified coverage - a single focal to provide a personalized partner experience.
- Investments in IBM Sellers to work exclusively with partners to drive growth—identify opportunities and help close partner deals across all tracks—Build, Service and Sell.
- Deep technical support to help you architect solutions with IBM technology.
- Hybrid cloud build resources to help partners design, build and/or migrate solutions with IBM systems and software technology built for hybrid cloud.

**More opportunities to drive demand and increase earnings**

- Investments in client coverage where IBM Sellers are focused on jointly selling with partners.
- Additional demand generation funding and digital campaign capabilities.
- An expanded Cloud Engagement Fund for supporting you and your clients' journey to cloud.
- Marketplace monetization opportunities for your solutions.

## Scaled our partner community:

- Merged WDG partner's program into IBM's
- New trial process allows customers to try the product without installing anything, with an over-the-browser virtual desktop experience
- Grew program to 247 partners

## Introduced several accelerators to help drive sales and adoption:

- Sales training tracks and Technical Certification Program
- **Discovery workshops** to help uncover high-impact automation opportunities
- **Botathons** to show value of RPA to businesses in a gamified format
- **Bot Build-ups** to develop, test and deploy bots
- **MentorBots** to access remote training and mentoring

# Start small with IBM RPA and grow as your business demands

## Sample sizing configurations:

### Small configuration example

1 x Environment  
2 x Attended bot  
1 x Unattended bot / IVA  
Unlimited Studio and OCR

### Medium configuration example

2 x Environment  
10 x Attended bot  
5 x Unattended bot / IVA  
Unlimited Studio and OCR  
Cognitive Capture, Workflow \*

### Large configuration example

3 x Environment  
500 x Attended bot  
50 x Unattended bot / IVA  
Unlimited Studio and OCR  
Cognitive Capture,  
Workflow, Decisions and  
Content Management \*

\* Complementary automation capabilities available through IBM Cloud Pak for Automation

# Need help implementing RPA? IBM offers these four Expert Lab Services

## Discovery Workshop

2 days

**Discover high-impact automation opportunities.**

Our team of automation experts will help you identify scenarios where IBM RPA and unique AI capabilities can make the most difference.

## Botathon

3 days

**Show value of RPA to your business in a gamified format.**

Have your team participate in a gamified bot build-up to demonstrate the fun and value of automating tasks from a builder perspective.

## Bot Build-up

4–8 weeks

**Develop, test and deploy bots.**

We'll help you do it using proven best practices.

## MentorBot

2–8 days

**Access remote training and mentoring.**

Get tailored expert advice, training, and health checks to ensure your team's success.

For more information or to schedule one of these services, visit: [ibm.biz/RPA-ExpertLabs](https://ibm.biz/RPA-ExpertLabs)



# IBM RPA Elite Team

Ensuring customers realize their intended business goals and outcomes through IBM Robotic Process Automation

## What is our mission?

IBM RPA Elite Team's mission is to work closely with each of our customers during their Robotic Process Automation (RPA) Journey. You can rely on us to be your advocates to accelerate product usage, drive problem resolutions, and request product enhancements and roadmaps.



### What We Do

We provide the right support with the quality that you deserve. We can:

- Run Discovery and New Adoption Workshops
- Engage our IBM Expert Labs and Business Partners
- Help define RPA roles in your Center of Excellence (CoE)
- Review bot implementation plans
- Provide Quality Assurance reviews
- Accelerate potential problem resolutions
- Support requests for product enhancements



### How We Do It

The following assets allow you to go deeper, with our direct support and through self-paced learning:

- RPA Discovery workshops help identify business and IT use cases
- During the New Adoptions Workshop, we collaborate to define your next steps in your RPA Journey
- Official self-paced or F2F education, demos and hands-on labs accelerate your team's knowledge
- RPA assessments clarify and benchmark where you are in the journey, and possible next steps



### Getting Started

As soon as a new client buys IBM RPA, we engage to set you up for success.

First, we will send an IBM RPA Elite Team Welcome Letter to the new client, to set up a kick-off meeting and begin planning.

We are involved from the start of your first RPA project implementation, whether led by IBM, an IBM Business Partner, or by your own professionals.

### Contact us

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