

# RPA @ Acerta Payroll Services





**acerta**

our company  
in a nutshell



Powered  
by people

acerta



Enterprise  
Office



Starters and  
self-employed



Payroll  
services



HR consultancy

1 460  
employees

€ 176 mio  
turnover

28  
offices

5 700  
accountants

287 465  
self-employed

662 000  
payroll  
calculations

40 137  
companies



Acerta is the HR department of  
more than 1 million employers

# We support you at every growth stage of your company

You can start in a jiffy:  
The enterprise office takes care of all the formalities for you.

Your social contributions are always in order and up to date.

The support you enjoy is tailored to your personnel's payroll administrative requirements.

You can count on specialized advice for all your HR affairs.

We, as a strongly integrated and all-round HR group, are always at your service.

You start

You are self-employed

You are an employer

Your company grows

You further shape your HR policy

Enterprise Office

Social Insurance Fund

Acerta Consult services

Payroll services

Child benefit fund

Legal advice

*your speaker: Jurgen Claes, manager business transition*



## The RPA Roadmap @ Acerta Payroll Services

- How it started?
  - Building a success story
  - Obstacles





How it started



# How it started...

The logo for acerta connect, with 'acerta' in blue and 'connect' in blue with a red underline, all enclosed in a red rectangular border.

**HR**magazine

March 2018

"We will soon be deploying robots to test the updates to Acerta Connect, our Payroll tool", says Jurgen Claes of Acerta. He is manager of the business transition team that takes care of the connection between the business users and the ICT department.

"Every quarter, we produce a new version of the software, which we use to create additional features. On the one hand, we are testing the new functionality, but on the other hand, we also want to check whether the application as a whole is still working properly. It is these latter business as usual tests - that are often only carried out in the final phase - for which we want to use the robots."

Acerta now provides a test room for this, in which a number of employees from the payroll offices are coming together to make sure it's all working well. In the future this will run fully automatic. In this way, Acerta saves 35 man-days on a quarterly basis. These payroll employees will soon be able to focus on tasks with more added value for the customer. "Moreover, we can develop longer, by making the test period shorter. As a result, we are going to deliver more functionalities for our customers per release".

# The sky is the limit?

*The sky is not the limit. Your mind is!* (Marilyn Monroe)

## Inventory of operational processes within the domain of Payroll Services

*Which operational, repetitive, time-consuming tasks can a robot run to lighten workload among Acerta Payroll Services employees?*

### Criteria:

- ✓ Repetitive tasks that are now performed manually
- ✓ The tasks are based on a specific logic (rule-based)
- ✓ The input is digitally readable and fits into certain structures
- ✓ The process is mapped out (and standardized + optimized)
- ✓ The process has a 'minimal exception rate'
- ✓ Sufficient scale: large quantity and/or sufficient periodicity (after all, adjusting a robot also costs time and test work) → business case!
- ✓ Sufficient future perspective for the process in its current form



**Building a  
success story**



# Building a success story

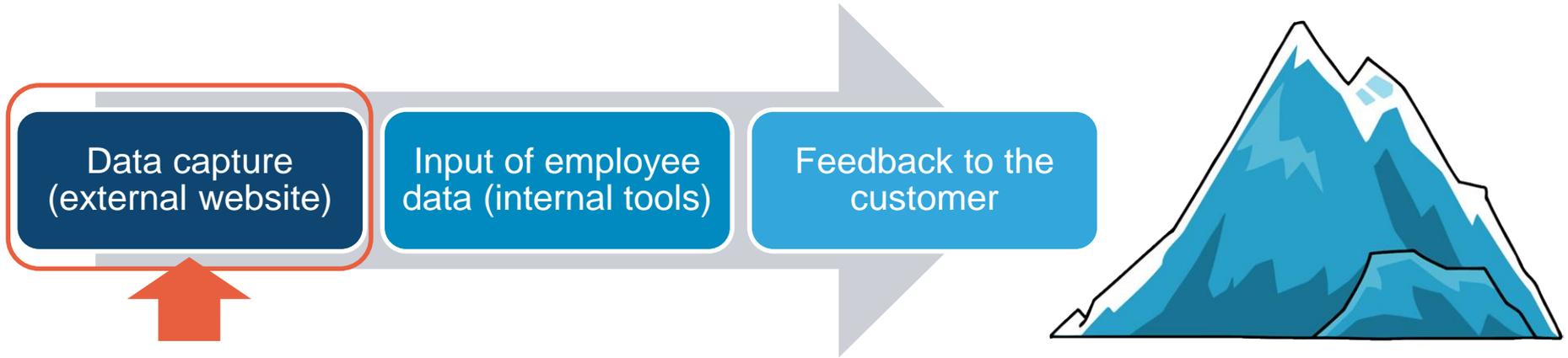


*What do you do if you believe in something, but you don't have enough resources / funding?*

start ***small!***

'the **SUCCESS** case'

# The success case



start *small*

**Scope:** 4000 queries per month.  
The results of the queries are stored in excel files.

**Business value** (yearly):  
300 man-days

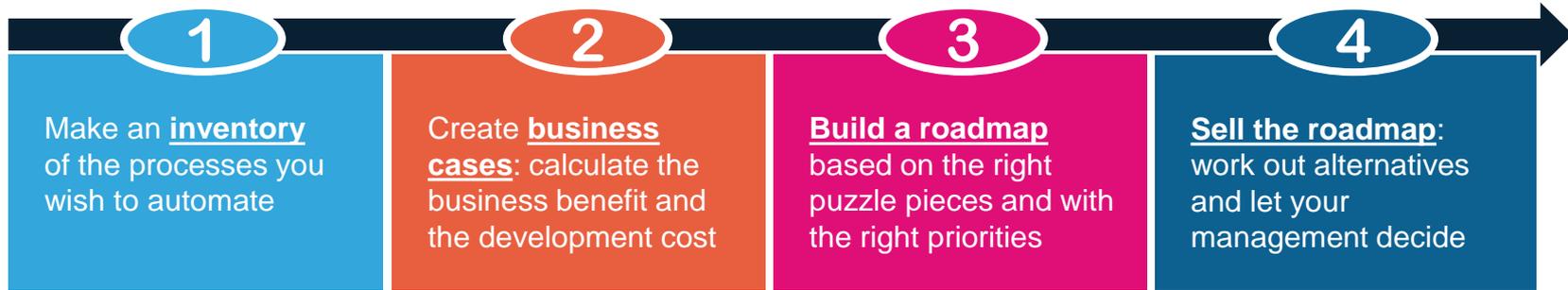
**Development cost** for the first demo:  
5 man-days



**1<sup>st</sup> success case!**

**Show** what you have realized  
**Explain** the possibilities

# Building a roadmap



## Use the right tool to support the process



### RPA Solution Framework and Process Assessment Tool

#### Workbook overview

Worksheet	Explanation
1. Assumptions	This sheet includes all assumptions made in this SFW. Some cells are project specific and must be populated, other global experience of Robotics engagements
2. Organisational context	This sheet includes all reference lists you need to use in this SFW, e.g. names of all business units and all teams with populated for each specific project
3. Client applications	This sheet gives an overview of the client's different applications. The scope of applications will be project specific. This contents provide information that can be used when populating fields in other sheets. This sheet (separated from rest prior to or at the start of the engagement.
4. High-level priority assessment	This assessment is based on several defined criteria which indicate the level of benefit that might be obtained by using things such as doing a rough analysis to choose the initial focus area for Robotics. This assessment will highlight are initiatives, where much of the work is focused around paper/telephone, etc.
5. Process list	This sheet can be used in any situation where you want to evaluate a list of processes and the benefits for each process benefits and a prioritised list of processes. This could be as part of an opportunity assessment, a production pilot or a The data in this sheet is the basis for the output in sheets XXXX.
6. Summary of opportunities	This sheet uses the data from the process list sheet to give a summary of the total opportunities across business unit
7. Process prioritisation	This sheet shows different prioritisations of the processes in the Process list sheet, based on different criteria.
8. Timeline	This sheet shows a timeline of the processes in the Process list sheet, based on different criteria such as analysis, d

# Building a roadmap

1

Make an inventory of the processes you wish to automate

- Search broadly for opportunities
- Discuss with the people who are running the processes today
- Request information that is relevant in this phase (we don't need all the details yet!)
  - ✓ **Feasibility:** assess the RPA criteria
  - ✓ **Business benefit:**
    - How often do we execute the task?
    - How much time does one task take?
  - ✓ **Development cost:**
    - How many and which tools do we use?
    - Which process steps do we execute?
    - Are there many exception flows?
    - Is the process documentation available?



# Building a roadmap

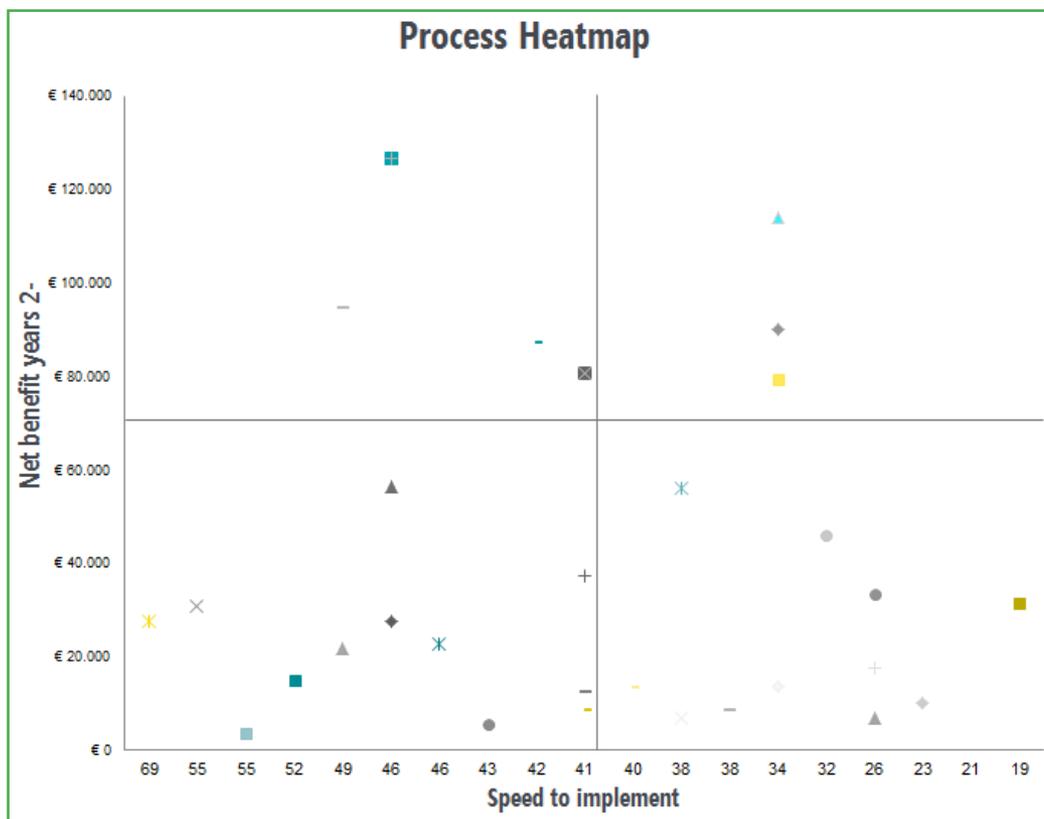
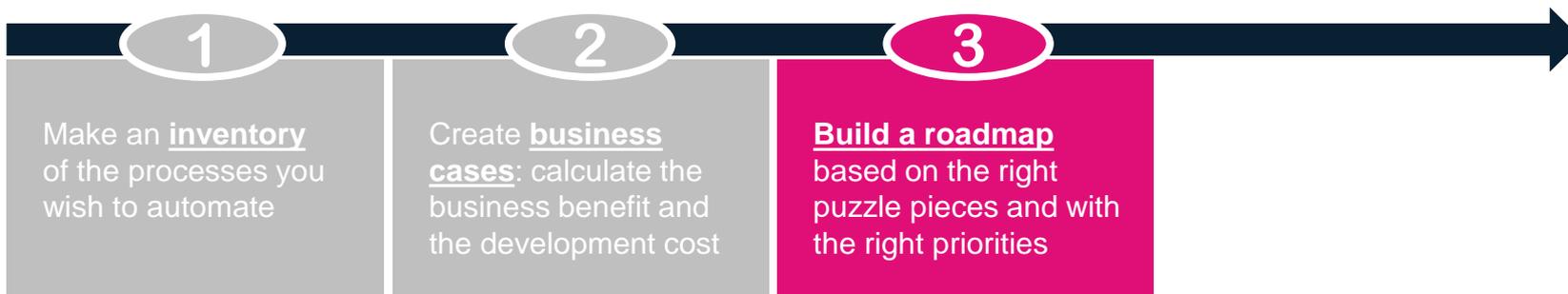


Business benefit

Development cost

PROCESS INFO			GROSS SAVINGS		BENEFITS	
Process name	Average unit time (min)	Units per month	FTEs released	Est. total dev mandays	Net benefit year 1	ROI year 1
Process 1	15	300	0,51	22,62	15.918,60 €	108%
Process 2	4	1250	0,57	10,20	26.792,96 €	368%
Process 3	15	600	1,02	22,62	44.703,27 €	269%
Process 4	1	13000	1,48	11,34	- 9.356,31 €	-84%
Process 5	15	250	0,43	22,34	11.295,24 €	79%
Process 6	10	100	0,11	21,47	- 5.701,71 €	-46%
Process 7	15	400	0,68	20,10	26.968,00 €	194%
Process 8	5	300	0,17	20,10	- 1.816,67 €	-15%
Process 9	7	300	0,24	20,10	2.021,29 €	16%
Process 10	0,33	5000	0,19	12,75	3.924,45 €	54%
Process 11	1	2500	0,28	25,13	1.446,43 €	9%
Process 12	30	40	0,14	13,50	487,44 €	6%
Process 13	10	500	0,57	26,80	16.393,41 €	93%
Process 14	3	1500	0,51	33,78	8.955,28 €	41%

# Building a roadmap

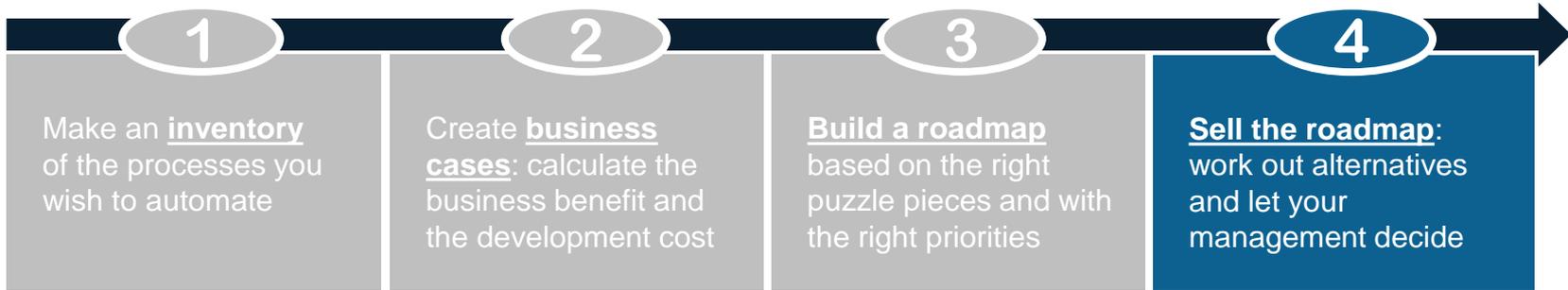


<b>Priority 2:</b> Longer to implement, High benefit	<b>Priority 1:</b> Quick wins
<b>Priority 3:</b> Longer to implement, Lower benefit	<b>Priority 2:</b> Quick to implement, Lower benefit

**You need to make choices!**

*This sometimes means that you have to drop an initially great idea.*

# Building a roadmap



## High Speed



Antwerp → Amsterdam (€€€ in 01h12)

## InterCity



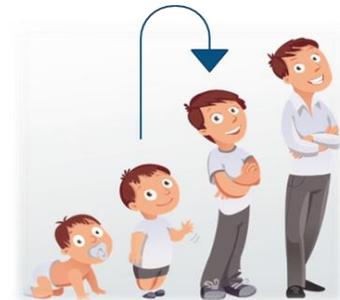
Antwerp → Rotterdam → Amsterdam (€€ in 02h18)

## Local Train



Antwerp → Roosendaal → Rotterdam → Amsterdam (€ in 03h24)

! Connection not guaranteed





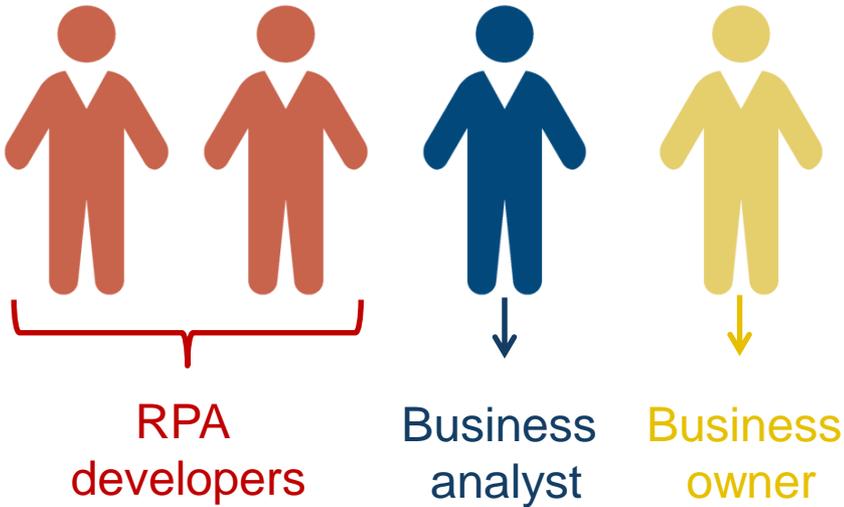
**GO!**

# Time for action!



The team

## RPA competence centre



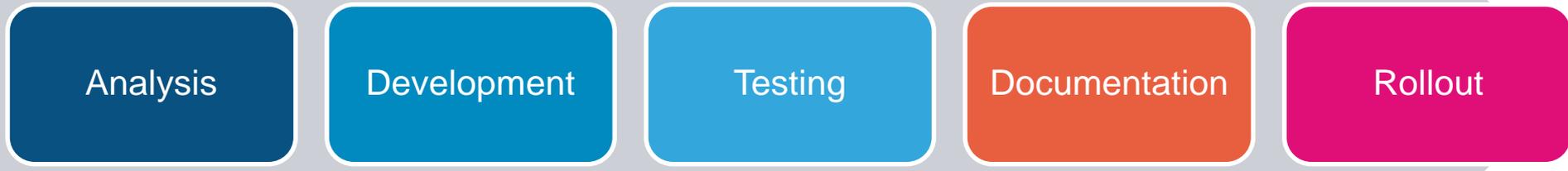
## RPA user group



# Time for action!



## The approach



**Business analyst**

Process Definition Document ...

... in collaboration with **business (subject matter) experts**

... validated by the **user group**

**Developer**

Development (UI Path)

Iterative process (in frequent consultation with **business analyst**)

Intermediate demos to **business**

**Developer**

System tests & Primary functional tests

**Business analyst**

Functional tests & user acceptance tests in collaboration with **business experts**

**Developer**

Solution Description Document

**Business analyst**

Process documentation

User Guidelines

**Business analyst**

Embedding of the new process (collaboration with **user group**)

Process monitoring





Obstacles



## Obstacles @ the start

'Let's stay under the radar, or it will sound threatening...'

'As soon as the robot brings my coffee, I'm a believer...'

'We can't allow this because of our policies...'

## Avoiding obstacles down the road

A user group is great, but to understand the processes you need subject matter experts.

Agree on what you automate and ...  
manage progressive insight.

Manage your funnel of opportunities and  
only focus on the **golden** cases.

## Avoiding obstacles down the road

First of all: focus on reaching the promised business benefits.

Multitasking is a bad idea.  
Create and respect a realistic project plan.

Put enough effort in documentation to avoid inertia.

