

AUTOMATION CONSULTANCY

PLAYBOOK



INTRO

Why this Playbook?



Create a holistic approach to competencies for automation in your consulting.



According to a study by EY, 50% of all initial RPA projects fail - sound competencies help prevent this.



Hey,

This playbook is designed to help you and your consultancy build competencies in automation.

We recommend you work chronologically with the playbook to get the most out of the many opportunities in automation!

Check out the overview first and dive deeper into the areas that are relevant to you!

Good luck with your skill building!



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INTRO

The **Future** is Process Automation.

In thousands of business processes, colleagues often still perform repetitive and manual tasks on the computer. For example, they transfer data from Excel files into ERP systems, fill out forms, or create text documents.

The current tech stack already makes it possible to automate these manual tasks, but companies usually lack competencies in process discovery, process management, change management and practical implementation.

These gaps are filled internally or with external consulting help at great expense.

Goals

- ✓ Save costs
- ✓ Minimize compliance risks
- ✓ Increase sales
- ✓ Increase employee satisfaction
- ✓ Increase customer satisfaction



INTRO



Automation offers **great potential** for every company.

1

Management-transparency

Automated processes are clearly defined and optimized. With the data gained, it becomes easier to understand the business and get ideas for further improvements.

2

Higher productivity

By automating processes, business goals can be achieved faster and better results can be achieved.

3

Error reduction

To err is human, but a bot is never wrong. Automation drastically reduces process errors.

4

Lower costs

Companies can save up to 59% of costs - thanks to Process Automation.

5

Better staff utilization

Employees can focus on more meaningful tasks instead of wasting time on repetitive tasks.

6

Reduced compliance-risks

Sophisticated and automated processes already cover all internal as well as external standards.

INTRO

A little insight into the **possibilities** of Process Automation.

Example processes

- ✓ Invoice Processing
 - ✓ Sales Order
 - ✓ ERP-Data entries
 - ✓ Payroll
 - ✓ Onboarding
 - ✓ Nutzer User
- etc.

Use Case-example

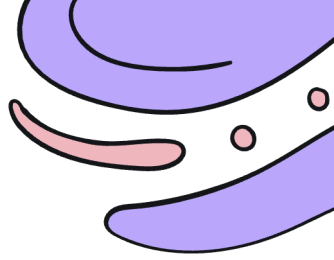
A company orders goods from its suppliers. The aim of the process is to match the order confirmations from the suppliers with the original order data from their purchasing department.

Business Case-Data

- The company compares about 200 orders a day. The manual processing time for a comparison is 7 minutes.
- The average cost for employees handling this process is 60k per year.
- There is only a lower risk of overpaying for orders.

Automated Processes

- Purchasing department receives order confirmation as PDF via Outlook.
- PDF is scanned by an RPA-Bot.
- Data is forwarded to a separate spreadsheet (XML).
- A software robot compares data from order in ERP system with spreadsheet (address, price, date).
- If there is a difference, the software robot pushes a service ticket to the purchasing team via the software interface.



CHAPTER 1

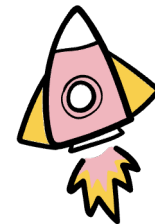
Why consultancies should offer **Process Automation**?



Automation is evolving rapidly, as are individual branches of automation, such as RPA - Robotic Process Automation. More and more companies are choosing to automate some processes to improve them and help employees focus on meaningful and creative tasks.

To achieve automation, professional support is often needed, and one way is to hire a consultant.

Consultancies thus have a unique opportunity to enter a still early (especially in Germany), but steeply growing market driven by an enormous need on the part of companies.



CHAPTER 1

The Automation-Market in data.

30%

More than 30% of all companies have already automated **at least one process**.

66%

More than 66% of companies are exploring **solutions for automation**.

40,6%

The RPA market was valued at approximately **\$1.4 billion** in 2019 and is expected to grow at a CAGR of 40.6% by 2027.

73%

According to 73% of IT executives surveyed, employees in companies are already saving up to **50% of their time thanks to automation**.

25%

Half of all companies already use AI for at least one function, 25% of them **in combination with process automation**.

29%

24% of companies have already implemented or are working on low-code automation software, and more than **29% plan to do so in the near future**.

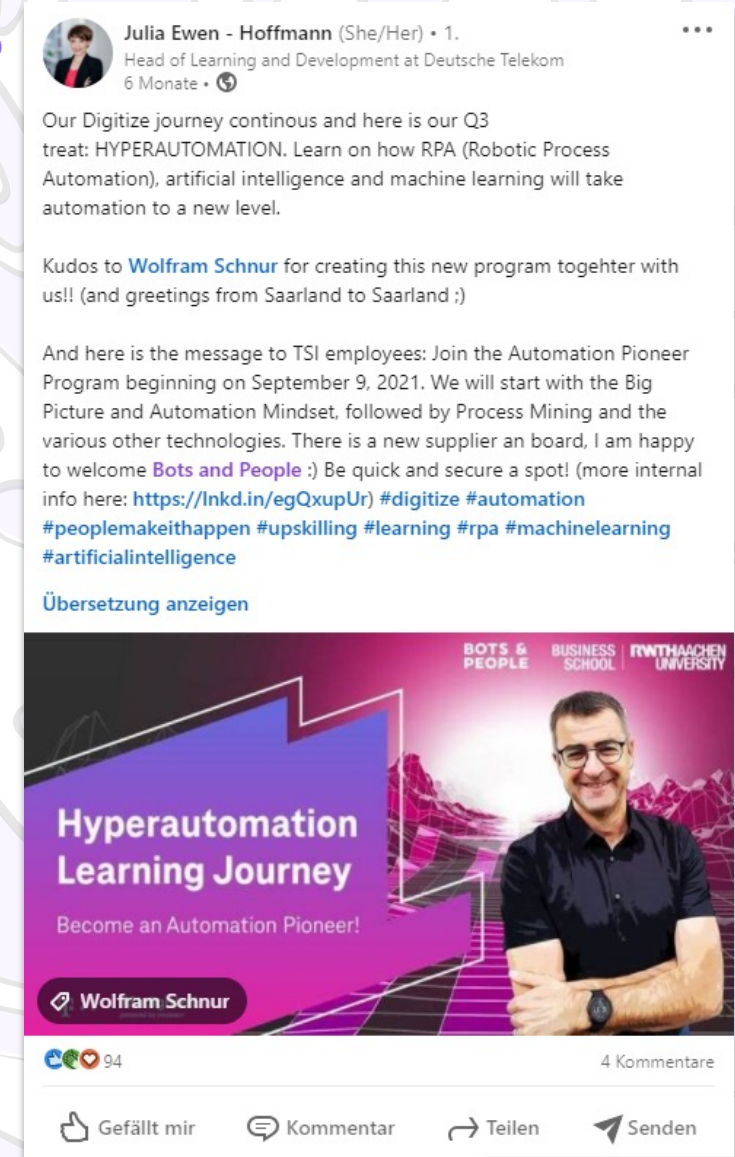
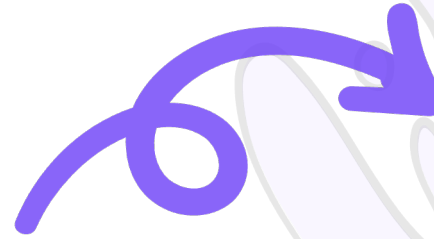
CHAPTER 1

The Automation gap is already shrinking.

More and more are already recognizing the need in German companies and are already offering consulting services in the area of digitization and process automation.

This is also the case for T-Systems, which, together with Bots and People, the Business School and RWTH Aachen University, has launched the Automation Pioneer Program to build up expertise in the areas of RPA, AI and machine learning.

The goal here was to prepare the company's own consultants for the rolling wave of process automation and to ride the wave instead of watching it from the beach.



CHAPTER 1

What actually is an Automation Consultant?

Automation Consultants use a range of tools and methods to help companies automate tasks and entire processes.

They are knowledgeable in related areas such as business process management and business process automation, and know how to optimize and automate across the enterprise and across departments.

Ideally, a team of Automation Consultants with different areas of focus can help an organization plan, define, implement and ultimately maintain automations.



Basic knowledge of an Automation Consultant:



Assess process capabilities and establish prioritization measures (Process Discovery).



Develop strategies, define and measure KPIs, and implement projects (Process Management).



Educate employees and stakeholders about automation (Change Management).



Ensure that automated processes comply with the latest regulations (Compliance).

Each consultant must also be an automation strategist, understanding all other aspects of automation and ultimately deciding which technology, strategy and tool is right for which business.

CHAPTER 1

Technologien, in denen ein Automation Consultant Skills haben sollte!



Business Process Modeling (BPM)

Technology for documenting and modeling processes (e.g. Signavio).

Process Mining/ Task Mining

Analysis of process data from user interaction with computers or software (e.g. Celonis).

Robotic Process Automation (RPA)

Software bots that imitate user behavior on the computer (e.g., UiPath).

Workflow-Automation

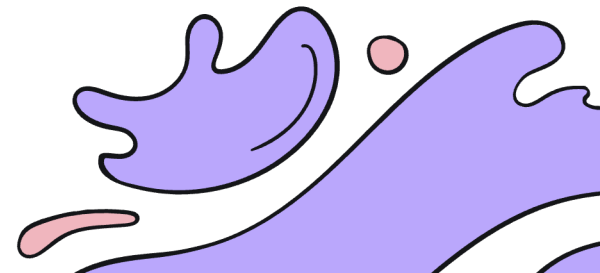
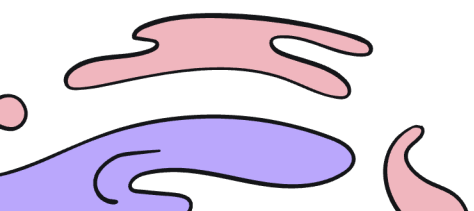
Applications with user interactions such as forms or simple decisions (e.g. Bizagi).

Artificial Intelligence (AI)

Software that can automate complex tasks (e.g. Automation Hero).

Interfaces (API)

Automatisierte Datenverarbeitung zwischen Software, die über ihre Programmierschnittstellen integriert werden kann.



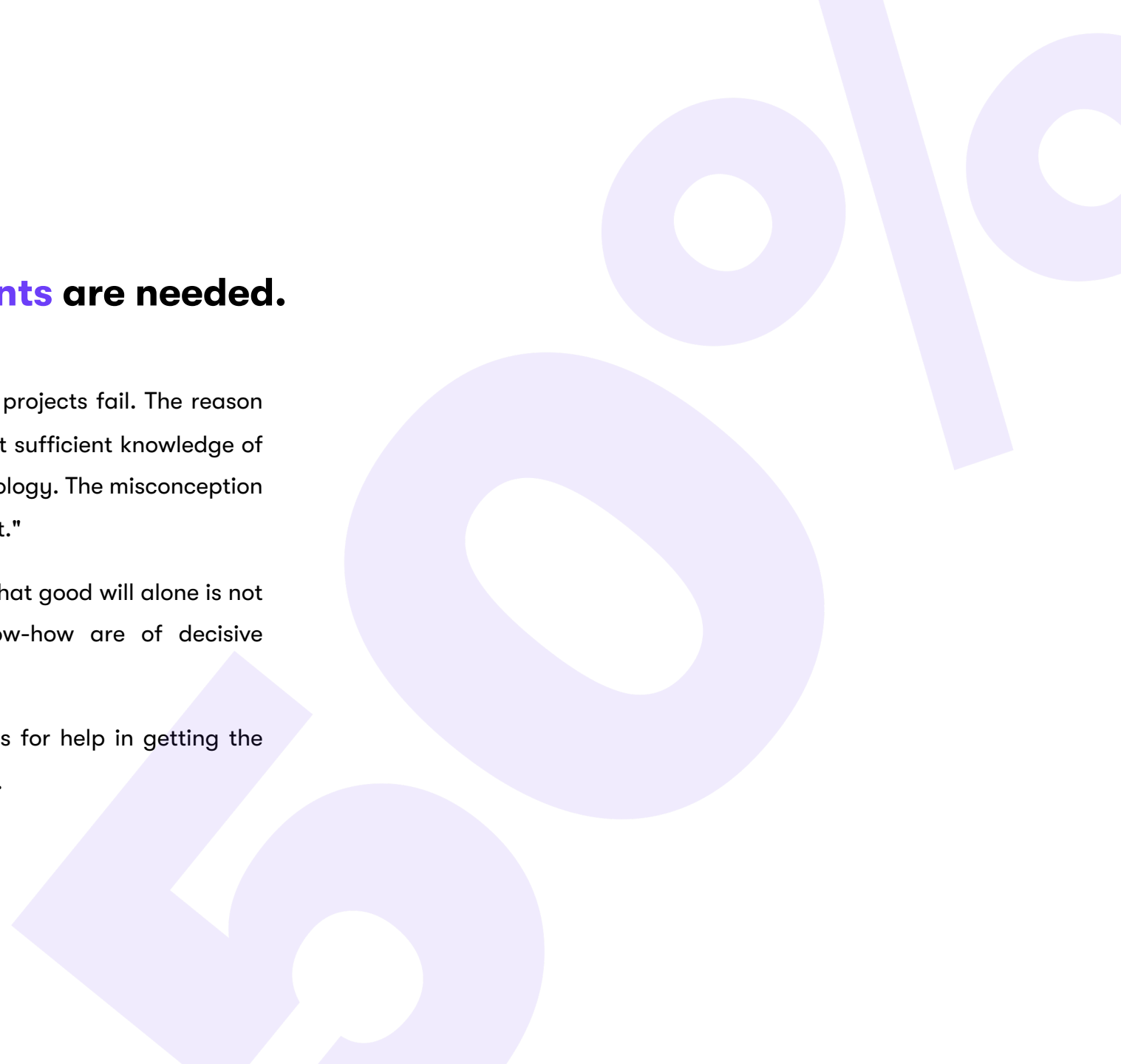
CHAPTER 1

That's why **Automation Consultants** are needed.

According to a study by EY, 50% of all initial automation projects fail. The reason for this is that automation is often simply "started" without sufficient knowledge of the processes and the automation technology and methodology. The misconception is then usually: "IT can do it. They know about stuff like that."

After the first bumpy steps, many companies then realize that good will alone is not enough and that a professional introduction and know-how are of decisive importance for the success of an installation.

As a result, these companies then turn to consulting firms for help in getting the automation journey they have started on on the right track.



CHAPTER 2

This **New Comer** are focusing on Automation Consultancy.



Roboyo, founded in 2016 and headquartered in Nuremberg, Germany, offers consulting and implementation services in the areas of Intelligent Automation (IPA), Artificial Intelligence, Personal Robotic Assistance, Intelligent Document Processing, and Low Code Application.



The **Weissenberg Group** based in Wolfsburg, Germany, has been helping to create forward-looking digital solutions from practice for practice since 2013 with its strategic and interdisciplinary consulting services as a vendor-independent provider. Within the scope of RPA software consulting, Weissenberg provides support in selecting the most suitable RPA system.



The **Business Consulting House** is committed to end-to-end process consulting. The services offered range from the overall automation idea to the maintenance of the automated process and include process automation strategy, concept development, activation and execution.



As part of an efficient implementation, **CGI** combines RPA with other technologies to automate complex decisions, processes and interactions and to develop new digital operating models. CGI not only offers individual and flexible solutions, but also a broad portfolio of services in the area of RPA, from strategy to full managed service.

CHAPTER 2

This **New Comer** are focusing on Automation Consultancy.

wemakefuture.

[Wemakefuture](#) is Germany's first cloud automation agency that iteratively and agilely creates automated workflows for improved customer experiences using iPaaS and cloud BPA for SMEs, start-ups and large enterprises. With the introduction of the integration solution, all eligible processes are analyzed and optimized before they are automated.



[Deefinity Digital Consulting](#) advises and supports small and medium-sized businesses to large customers in order to get fit for digitalization and automation. In doing so, the Berlin-based company implements the latest technologies such as RPA & IPA, artificial intelligence (AI) and digital solutions and platforms of its technology partners for its customers.

CHAPTER 2

These **Big Players** also want a piece of the automation pie.



To leverage the many benefits as an important contribution to the digital strategy, the **PWC** RPA Competence Team offers support services along the entire journey, from strategy consulting to RPA potential analysis, tool selection and implementation.



Limited to the life sciences, financial services, healthcare and chemicals industries, **EY** offers support in the area of IPA. The starting point is the evaluation of the organization and processes in order to identify automation candidates and restructure processes.



KPMG sees itself as a partner in making RPA, advanced learning and cognitive computing an integral part of the world of work. To this end, KPMG takes an approach that accompanies companies at every step of their journey into a digital working world, from strategy to implementation.



The global, cross-industry and cross-functional **Deloitte** Center for Process Robotics stands for a holistic approach to the automation topic. The more than 1,000 process and automation experts of the multi-industry player view Process Robotics not only as a pure technology topic, but also from a business perspective.

CHAPTER 2

Where does Bots and People stand on this?

With its platform concept, Bots and People also joins the group of vendor-independent consultancies. However, the approach differs from the other, classic approaches.

With Bots and People, the focus is on enabling people, which is related to the fact that Bots and People originally comes from the training sector.

The focus is therefore on building up automation competencies - be it for the implementation of internal automation projects or [the training and further education of automation consultants](#) in partner consultancies.



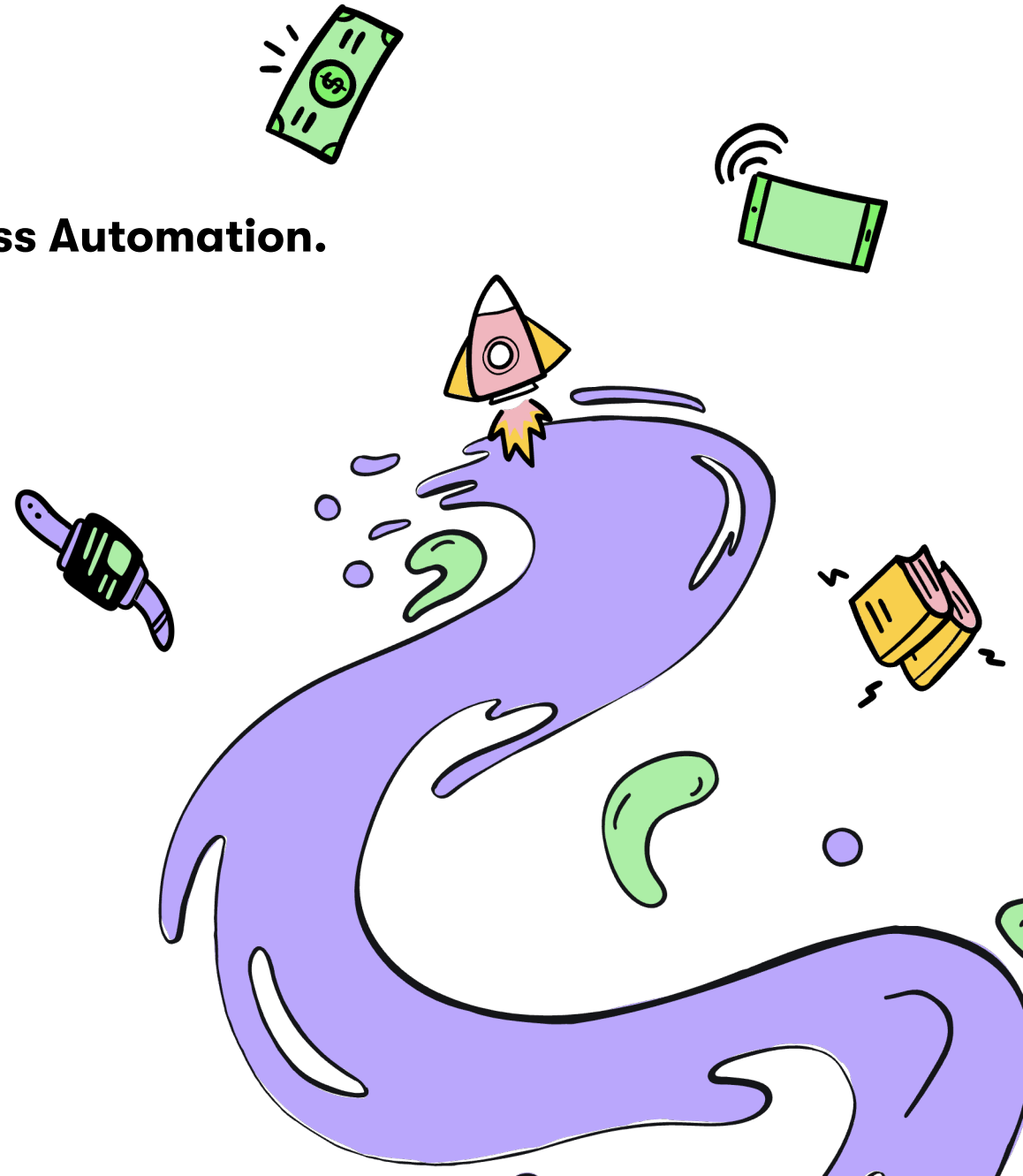
CHAPTER 3

How **Consultants** build competencies for Process Automation.

People are one of the decisive factors for successful change. Bots and People develops certifications that enable people to prepare themselves optimally for the topics surrounding automation. This takes into account the professional context in which the person operates and the "automation knowledge level" at which they find themselves.

The [Automation Starter](#), [Automation Agent](#) and finally the [Automation Strategist](#) learning paths are recommended for the progression to Automation Consultant.

In the following [knowledge x role matrix](#), you can take a closer look at the structure of the learning offering.



CHAPTER 3

Learning path:

A1	Automation History
A2	Automation Overview
A3	Process understanding
A4	Automation in companies
A5	Data and Automation
A6	Automation examples from practice

AUTOMATION Starter

Description



In this learning path you will see what automation means and how the world of automation has developed in recent years. Get an insight into the history of automation and the current market overview. Understand what exactly processes are and how different automation processes come together in the company. The organization and the different roles in the company will also be highlighted. In addition, we will present various practical examples from real companies.

- ✓ Total duration: 4-5 Hours
- ✓ No previous experience necessary.
- ✓ Perfect for anyone who wants to build a basic understanding on the topic of automation.
- ✓ Own Discord Channel and regular Q&A sessions.

CHAPTER 3

Learning path:

B1	Process optimization
B2	Process automation process 1.0
B3	Process automation process 1.0
B4	Benefits & KPIs of an automation project
B5	Tools & Technologies
B6	How to tell & sell

AUTOMATION Agent

Description



Learn how to identify and leverage automation potential. Implement your idea in a process model, understand the flow of an automation project and calculate the KPIs and the business case. Get an overview of the common technologies and tools on the market and learn how to make the right choice for your process. Also learn how to convince other stakeholders of the potential of your automation project.

- ✓ Total duration: 10-15 Hours
- ✓ Basic understanding of automation required.
- ✓ Perfect for anyone who wants to identify automation potential and take it to the next level.
- ✓ Own Discord Channel and regular Q&A sessions.

CHAPTER 3

Learning path:

Week 1	C1	Economic relevance of automation
	C2	The Automation-Market
2	D1	Tools & Capabilities
Week 3	C3	Automation Strategy
	C4	Automation Initiative
Week 4	D2	Governance & Politics
	D3	Automation Infrastructure (Tech)
5	D4	Change Management

Week 6	D5	Kick Off: Own Case
	E	Deep Dive according to choice
7	Final & Case Presentation	

AUTOMATION Strategist

Description



Learn how to identify and leverage automation potential. Implement your idea in a process model, understand the flow of an automation project and calculate the KPIs and the business case. Get an overview of the common technologies and tools on the market and learn how to make the right choice for your process. Also learn how to convince other stakeholders of the potential of your automation project.

- ✓ Total duration: 30 - 45 Hours
- ✓ Strategic orientation of the content.
- ✓ Flexible learning times, **no** live Appointments.
- ✓ Exklusive Community Channel on Discord.

OUTRO

The **Future** as Automation Consultancy.

When an industry is nascent, it's not just how much you learn, but how early you start. Acquiring a skill early, while demand is still high, is often just as important as mastering the skill, as your company can quickly position itself in the market as an Automation Consultancy and reach better paying customers.

So if you're wondering when is the best time to start training Automation Consultants, the answer is now. There are many great resources that can help you begin your Automation Consultancy journey, including our featured offerings.

For more Information:

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Let's **automate** your **business!**

We help your company to scale internally by teaching automation skills and supporting your automation management. From idea generation to measuring your ROI. Tell us, what you need.

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