![Mighty Guides]

The Impact of Automation

on Modern Business

HOW BUSINESS AUTOMATION CHANGES BUSINESS

There's no turning back from the fact that disruptive business automation is here. As artificially intelligent functionality delivers more capabilities that we increasingly take for granted, it's difficult to grasp all the implications of this transformation. In this eBook, we aim to illustrate what it means for business, for the people who work in those businesses, and for people served by those businesses every day.

To better understand how automation is changing business, and with the generous support of CA Technologies, we reached out to 10 experts. After many fascinating discussions on this topic, we developed essays that address four key questions:

- **How has business automation changed your operations?**
- **What business processes would you like to automate?**
- **What best practices can you offer to someone who is implementing a large automation project?**
- **What does the future hold for businesses actively pursuing automation?**

In speaking with experts from different industries in both the public and private sectors, it became clear that cost reduction and gains in efficiency are not the only factors that drive automation. They may not even be the most important ones. Successful automation must also deliver greater value in the form of more accurate processes, better products and services, or entirely new value propositions not previously possible.

By providing practical insights into what is happening today and what may be just over the horizon, I believe this eBook will be a valuable resource for anyone planning an automation strategy.

All the best,
David Rogelberg
Publisher, Mighty Guides, Inc.

Mighty Guides make you stronger.

These authoritative and diverse guides provide a full view of a topic. They help you explore, compare, and contrast a variety of viewpoints so that you can determine what will work best for you. Reading a Mighty Guide is kind of like having your own team of experts. Each heartfelt and sincere piece of advice in this guide sits right next to the contributor's name, biography, and links so that you can learn more about their work. This background information gives you the proper context for each expert's independent perspective.

Credible advice from top experts helps you make strong decisions. Strong decisions make you mighty.

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At CA Technologies we are excited about business automation. We think it is the critical enabler to help drive business and empower digital transformation. We have worked with the Mighty Guides team to ask leading practitioners across different industries for their thoughts on the power of automation within their business. We hope you enjoy this compilation of stories.

We believe that, in today's ultra-complex, fast changing world, business automation is not just a differentiator, but an essential component of the modern enterprise. With the prevalence of digital disruptors, the ever-growing influence of big data and the increasing importance of the Internet of Things, automation is the only way businesses can achieve the agility and scalability required to compete. As a gateway to innovation, business automation increases productivity, drives revenue growth, reduces time to market and breaks down silos.

Here at CA Technologies, our automation solutions are designed to help you become more agile and to execute your key business imperatives faster. This will shorten your time to value and help you delight your customers with the best possible user experience. As your usage of automation expands, our solutions will help you orchestrate across different functions and different use cases to drive automation as a critical enabler of your digital transformation. Whether it's attaining continuous delivery for new applications, modernizing legacy systems, harnessing vast amounts of data, or delivering self-services to the business - our solutions provide high availability, unrivalled scalability and end-to-end visibility across all your processes, and from a modern unified interface.

Central to our portfolio is the industry-leading CA Automic One Automation Platform. This unified, open and scalable automation platform acts as a central point of control across your entire business. The overarching architecture ensures agility and stability, standardizing management and configuration of IT processes. It's our 'secret sauce', helping distinguish CA Technologies by driving scalability, openness and performance.

I hope you enjoy this book,

Dr. Chris Boorman
VP, Automation Marketing

ca technologies ®

CA Technologies is the leader in automation software. We drive competitive advantage by automating IT and business systems, delivering business agility across all environments, from on-premise to the cloud, big data and the Internet of Things. With over 40 years' experience, our solutions facilitate business growth, deliver faster time to value and ensure effective resource utilization, all while staying compliant and mitigating risk.

HOW BUSINESS AUTOMATION CHANGES BUSINESS

AARON GETTE
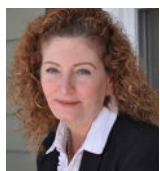
Chief Information Officer,
The Bay Club Company

Aaron Gette is a proven thought leader and influential IT professional with over 19 years of experience. He has worked with startups and Fortune 500 companies in the Bay Area, delivering CIO- and CTO-level leadership. Drawing on his ability to build and manage high-functioning teams, he has driven growth in companies he has worked for by converting traditional IT infrastructure into revenue-generating powerhouses. He is currently redefining the IT culture at The Bay Club and delivering a business-minded IT team to push the health and fitness resort chain into new affluent markets.

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"We've been going through an extensive digital transformation," says Aaron Gette, chief information officer at The Bay Club Company, a chain of health and fitness resorts headquartered in San Francisco. This has involved all aspects of the business and has required collaboration between business leaders and the executive team, department heads, and managers. "It's been an exciting and challenging transition, and it's been really good for us as an organization," Gette says.

A big part of the transformation involves sitting down with people in different parts of the business, particularly areas where a lot gets done manually, understanding how they do things and why, and then designing automation tools to improve those processes. "Initially we looked at manual-intensive work like massaging data, or using spreadsheets for things that could be done more effectively with other tools," Gette explains. "We worked to integrate the right systems, create the right bridges between systems, and really take a lot of the manual work out of what needed to happen." »»

> *Since the self-service portal went live, we're seeing 2,000 fewer tickets per month. That happened almost immediately, which has been great.*

That produced a number of immediate benefits—for example, it has streamlined financial reporting. "Just from a finance perspective, reporting happens at least 50 percent quicker, and we're closing the books month to month 70% faster than we were before," says Gette. But he also points out it's not just about streamlining an operation. Customer onboarding is a good example. Gette says, "People used to fill out paperwork, and that information had to be uploaded to another system. It was slow, labor intensive, and there were too many places to lose information." Automating that process not only streamlined it, but provided a way to make more use of the customer data to deliver more personalized service. "Onboarding customers is faster, we can now easily find any relevant information around a membership, and it allows us to create a more sophisticated way to work that is based on better analytics," Gette adds.

Another example of a collateral benefit of automation comes from the new self-service portal club members can use to review their account, pay bills, register complaints, set preferences, and more. This had an immediate operational benefit of reducing service-desk calls. "Before the self-service portal went in, we were consistently running 5,500 to 6,500 tickets a month. Since the portal went live, we're seeing 2,000 fewer tickets per month. That happened almost immediately, which has been great," says Gette. 〉〉〉

"Now we are gathering real data about how you actually utilize the facilities, and we do a better job of shaping a more unique and engaging experience around those areas of interest."

Beyond that operational benefit, however, the self-service portal has enabled the club to provide better service. "Now we are gathering real data points about how you actually utilize the facilities, and then we do a better job of shaping not only the marketing and sales outreach campaigns around those specific areas, but when you're in the club you have a more unique and engaging experience around those areas of interest," he explains.

He sees opportunities to automate processes that will improve inventory management and control, and other business areas as well. It's a prioritization process that requires planning to tie those kinds of changes back to business goals, and then working with people across the organization to get their buy-in. "Ultimately we want to shape a very unique experience for our customers that includes both their physical experience in the club, and their digital experience," Gette concludes. ■

KEY POINTS

1 Although automation streamlines operations, it can also have collateral advantages, such as adding value to core business offerings.

2 Automation requires planning to tie process changes back to business goals, and then working with people across the organization to get their buy-in.

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> We don't have a crystal ball to gaze into the future. However, considering the level of innovation taking place in the business automation and management industry using ML, RPA, AI, and Low Code BPMS solutions, businesses can take advantage of these technologies to improve efficiencies, which will help them focus on delivering better customer service.

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VALERIE VESSEY

Head of NA Small Business Operations and NA Pricing Execution Lead,
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Valerie Vessey has worked for a leading online payment company for more than five years, and is currently in charge of its small business operations and pricing execution, North America. She has proven experience in the establishment and management of full operation suites, product development, product marketing, pricing strategy and execution, cross functional program and portfolio management as well as a strong IT background, including many acquisitions/mergers. Previously, she has worked as a senior consultant at Bank of America and JP Morgan Chase. She has extensive expertise in e-commerce, payment platforms and retail banking, as well as mortgage origination and servicing.

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For Valerie Vessey, efficiency is the chief benefit of business automation. "Any time you can automate anything and get the human touch out of it, you're going to reduce or negate error," she stresses. Automation also provides a streamlined foundation upon which a business can build to gain even greater capabilities. "Through good business processes, you can learn the most advantageous way to execute or bring something to market or create a new offer," she explains. This applies to a whole range of areas including but not limited to product development, marketing, and even pricing.

Vessey, who heads small business operations and pricing execution, North America, at a leading online payment company, has found business automation particularly useful for marketing initiatives involving search engine optimization. "We can drive our future content based on what we collect," she explains. "And in turn, it can drive what our customers are looking for." Vessey and her colleagues measure their results with various types of paid digital campaigns and compare those results with performance on other channels such as email or direct mail. Whether they're running an ad campaign or another type of outbound campaign, they can track the results and even optimize the campaign in real time if needed. 〉〉〉

> *Any time you can automate anything and get the human touch out of it, you're going to reduce or negate error.*

Vessey has also found business automation instrumental in executing her company's overall pricing efforts. "We are extremely customer-centered, so we have to have our customers top of mind in everything we do," she explains. When it comes to pricing, the business cannot afford to make a mistake—it must be 100 percent accurate. Fortunately, business automation can help eliminate pricing errors that could negatively impact customer satisfaction. "I believe good business automation also drives accuracy, so it tends to eliminate mistakes," Vessey says. This helps the company deliver a high standard of customer service to its clients.

One process Vessey would like to automate is business case preparation. "It's one thing to complete a template," she says, "but it would be another thing to be able to actually create something where you input specific variables and have the output be automatically generated." It would be challenging for someone to sort through all of the necessary information, which would have to be customized for the business, in order to make this possible. First you'd need to have the research—the foundational information required to generate the analyses that are used to create the business case you would ultimately present to leadership for approval. "If someone could actually take that from end-to-end and not have it be 100 percent human touch through the entire process, I think they would probably be quite successful and sought after," she says. 〉〉〉

"I believe good business automation also drives accuracy, so it tends to eliminate mistakes."

Vessey believes that artificial intelligence and machine learning will help her firm achieve even more impressive results with business automation in the near future. To this end, they're creating a new tool incorporating artificial intelligence and social media analytics that they anticipate will give them better insight to aid in strategic decision-making. While they've only just rolled out the prototype, they're very excited about its potential. In this way, Vessey and her colleagues are building upon the efficiencies they have gained through business automation to achieve strategic advantages as well, realizing even greater benefits for their company. ◼

KEY POINTS

1 Business automation creates efficiencies that lay the foundation for future innovation of strategic benefit to the company.

2 Through business automation, a company can also increase its accuracy and reduce the instances of human error.

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> "
>
> *The greatest value in improving our processes comes from an end-to-end consideration. Restricting ourselves to isolated business process automation strategies reminds me that putting lipstick on a pig still leaves you with a pig.*
>
> "

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MIKE WONS

CTO,
State of Illinois

Mike Wons joined the State of Illinois in 2015 as the first state-wide chief technology officer (CTO). Focused on establishing and implementing the Illinois "FIRST" strategy for shaping the future of technology and innovation across Illinois, he leads all aspects of strategic technological execution by setting priorities for enterprise systems/software and infrastructure; evaluating current and future technologies; and most importantly, accelerating the execution of the state's strategy by launching new innovative solutions at a rapid pace.

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As CTO for the State of Illinois, Mike Wons believes business automation offers governments a powerful opportunity to create meaningful change in people's lives. "When I went in, the state was made up of essentially 40 different businesses and each one of those businesses could operate autonomously," he says. And, not surprisingly, a lot of duplicate systems had been created over the years, but Wons has been tackling the challenges posed by such outdated technology head-on.

"Our role is to enable innovation at these individual businesses and agencies," he says. As most of us know from direct experience, many of the interaction points for government are very antiquated. "Maybe if you're lucky you can fill out a form online, but when that form is received it's printed out and then it's sent to one department and then to another department, sent somewhere else, copied 27 times and stored," Wons explains. This old-school approach results in an enormous amount of paper-based processes. »

> " *Our role is to enable innovation at these individual businesses and agencies.* "

Upon encountering this challenge, Wons said, "OK. There are some really simple things you can do to automate paper processes." Applying the principles of the lean organization and the concept of business improvement to initiate a change, he launched a program called Rapid Results. "We educated 500 different people in government across the state," he explains. "They came together with their individual work teams to solve common problems. When we looked at what the teams came up with, we found that 95 percent of them wanted to automate paper-based processes."

Wons believes that it wasn't the processes themselves that were broken— it was that the technology was not allowing government employees to do their jobs better. "The state police processed something one way and then if you went into the Department of Public Health you'd find that they were processing something a different way, even though they were both doing the same thing," he explains. Fortunately, Wons and his colleagues were able to generate several best practices for how to harmonize these disparate processes. 〉〉〉

"When we looked at what the teams came up with, we found that 95 percent of them wanted to automate paper-based processes."

Wons and his colleagues also launched an initiative called Going Mobile in Illinois. When they started the project in 2015, only 1 percent of citizen-interaction points were mobile-enabled, which meant that people had to pick up a phone, go to an office, or send a form in the mail to do anything. "So we went down this path of mobile-enabling all the citizen-interaction points and we've made tremendous progress. Ninety-seven percent of our websites are now mobile-enabled," he says. And now, Illinois residents can access the information and services they need using their mobile devices.

Ultimately, Wons believes that business automation is not a destination but a journey. If your organization can show incremental wins in a quick time frame, it provides the momentum for even greater successes, and then he says, "I think you have a unique opportunity to make change." This is how he has approached automation initiatives in Illinois, making government services more accessible and streamlined for both government employees and the citizens they serve. ■

KEY POINTS

1 If processes aren't working efficiently, technology might not be enabling people to do their jobs as effectively as they could.

2 Business automation is a journey, not a destination. At the beginning, you build momentum by achieving quick wins.

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*A company with strong
automated processes will
be more innovative than its
competitors, resulting in greater
value for its customers.*

"

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TODD SIMPSON

CIO,
FDA

Todd Simpson is the CIO at the Food and Drug Administration (FDA) in Washington, DC. In this role, he is responsible for providing IT services and support to approximately 20,000 federal personnel and contractors that comprise the FDA community throughout the continental United States and internationally. Simpson has more than 24 years of IT leadership and management experience from the private sector and in the federal government.

Quite transformative," is the phrase that Todd Simpson, chief information officer (CIO) of the US Food and Drug Administration (FDA) uses to describe business automation. He should know. Since he began working with the FDA, he's helped to automate numerous business processes.

For example, one of his earliest projects involved shadowing California cabbage inspectors to really understand the seal-of-inspection process. "I saw inspections from beginning to end," Simpson says. "It was very telling because inspectors carried green books, and there was water dripping on the pages, and the pens would stop writing. It was just a mess because everything was wet." Simpson also noted that customers often asked to see the results of a previous inspection. The inspector would make note of the request and then go back and try to locate the old report in an enormous paper warehouse filled with reports. 〉〉〉

> *We've fully automated that entire inspection process from end-to-end. Within just a couple of years, we've amassed almost 30,000 electronic inspections.*

Since then, Simpson has automated the entire seal-of-inspection process. "We've fully automated that entire inspection process from end-to-end. Within just a couple of years, we've amassed almost 30,000 electronic inspections." This has enabled inspectors to perform more checkups, but that is only part of the story. The new digitized records have improved report accuracy and resulted in better customer communications. Now when a customer asks for a past report, the inspector can produce it immediately.

Automation has also strengthened collaboration between agencies. The FDA often receives requests from US Customs and Border Protection (CBP) to investigate suspected contraband. Simpson is implementing an electronic interface between the FDA and CBP. This interface automates auditing and tracking of contraband items that are intercepted by CBP. "It's all electronically tracked, so we can more rapidly move on that contraband," says Simpson. "The system, which we call ACE, is our interconnected presence with Customs and Border [Protection]. It enhances our regulatory presence on intake and allows our staff to have all the data at their fingertips when operating at docks and warehouses."

An unexpected benefit of automation is a strengthening of the collaborative spirit. "It's always been there," says Simpson, "but as we run up against more constrained resources, we have to find ways to extend ourselves through shared services. Automating businesses has been the mechanism that we have used at the FDA to build trust with our user base and to get more opportunities to go deeper into other areas of the business." 〉〉〉

"As we run up against more constrained resources, we have to find ways to extend ourselves through shared services."

One area of automation that has helped facilitate automation itself is application containerization and configuration management automation. "We've deployed nearly 400 automated containers, and we've also rolled out an auto-compliant service desk tool that has automated a lot of our interconnection points, as well as dozens of products that have automated our monitoring capabilities, our security vulnerability scanning, our training, and all of the downstream processes," Simpson says.

"From a self-service standpoint," he explains, "I'm tracking 3,591 automated configurations, where we've used a tool that allows users to click a button to spin up an entire environment and then load data into our configuration management database. That used to require four or five people working for several days. We've reduced that down to hours and with very little manual input."

According to Simpson, 7.2% of the FDA's applications are in the cloud. "We did that with the help of automation," he says. This has enabled the agency to redirect resourcing to the cloud, and to operationalize some of the cloud management that needs to be done. "I'm confident that we're going to move in the direction where we have a lot more automation in our traffic management and in our network optimization," he says. "We spend a lot of time manually configuring things. Software-defined networking will relieve that burden." ■

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> " Automation is a fantastic opportunity for streamlining and 'de-frictioning' customer experience. The problem is that you should only be automating after making sure the process or experience is as good as it can be beforehand. If you automate crap you just get fast crap. "

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THANOS LAGIOS

Head of Rapid Automation, Allianz Global Corporate & Specialty

Thanos Lagios, head of rapid automation at Allianz Global Corporate & Specialty, is responsible for driving automation, digitalization and productivity gains across the company, focusing on software robotics and their applicability in the insurance business. Lagios has been in the position for about five months, before which he worked in the IT industry managing service delivery. He holds a BSc in Information Systems from the University of Edinburgh.

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Thanos Lagios believes that as business automation becomes more commonplace in the business world, it is profoundly changing business operations. "In the last few years, automation has become approachable to a lot of organizations that didn't have the technology or the knowledge to embark on something like this," he says. Now that more businesses have the capability to pursue business automation initiatives, they are noticing its impact in two areas: change management and business productivity.

"The first and foremost thing that I've observed, from a change-management perspective, is that companies are organizationally shifting," says Lagios, who is head of rapid automation at Allianz Global Corporate & Specialty. Some employees may harbor concerns that robots are quite literally coming to take their jobs. "It's hard to think of something that may be able to replace you or something that does things faster than you as non threatening," he explains. This is especially true for experienced professionals who have been with the company for a long time or who manage large teams. 〉〉〉

> *At AGCS, the message is that automation is here to help you.*

But by paying careful attention to change management, a business can show its employees how automation enhances their jobs. "At AGCS, the message is that automation is here to help you," Lagios says. "It's here to take away those repetitive tasks and those menial, tedious jobs that you do on a day-to-day basis that take up 20 or 30 minutes of your time and add up over the course of a week or a month to something that is wasteful." He adds that by preparing the marketing and the communication on automation in a very friendly and inclusive way, businesses can gradually transform the concept of change into a norm rather than a feared outcome.

Business automation also boosts business productivity. "Once you've removed the burden of repetitive, time-consuming tasks from the staff," he says, "you have more time for your people to focus on the customer relationship, product innovation, or new technologies. Then they can actually give you more value." For example, Lagios's company already has about 80 bots performing tasks that were previously carried out by humans. "We've noticed that already deployed BOTs are providing a faster turnaround and that data is flowing in synchronized fashion," he says. 〉〉〉

"We found that timely collaboration and communication with IT was integral to our success."

Lagios's firm found that collaboration and constant communication with all parts of the organization, and specifically IT was integral to success of the department. Ensuring there is buy-in across the technical and business teams is required in order to avoid delays and to provide the maximum business benefit. To that extent, the sooner the teams are brought in, the better. Operating procedures and governance is mandatory, not only for compliance but for transparency to the business.

Any business pursuing business automation can expect to experience changes in two areas: change management and business productivity. By including employees in the process and showing them the benefits that automation can bring to their work, it can ensure greater staff buy-in for future changes. And as the business becomes more efficient, it will be able to maximize its employees' talent. Ultimately, says Lagios, "It is about making the company better at what it can do." ■

KEY POINTS

1 Business automation brings significant change to an organization while also generating increased productivity.

2 By including employees in the process, companies can ensure greater organizational buy-in for a business automation initiative.

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> *Business process automation has allowed our organization to improve our customers' experience dramatically—providing them with actionable data—sourced across disparate systems in hours or days instead of the weeks or months traditional software development initiatives offered.*

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