

Appian RPA: Case study

Deloitte robotics has automated 100+ robotic processes with Appian RPA

Overview

Deloitte's Robotics Center of Excellence (CoE) is the only specialized center dedicated to **process automation technologies** in Spain and an international reference hub within Deloitte. Created in 2017 to accelerate processes and robotic innovation, it brings together more than 100 professionals who are integrated into a team of more than 4,000 Deloitte professional services specialists around the world.

This center holds Deloitte's digital and technological transformation consultancy services in intelligent automation. The firm has consolidated its position as a leader for workplace innovation, committed to promoting **hybrid workforces** that combine the best of human and robotic capabilities.

Deloitte Robotics CoE has chosen Appian RPA as the solution for the automation of the firm's internal processes and those of its clients, integrating the platform's unique capabilities into products and services for **digital process transformation**.



“The value of RPA lies in its ability to enhance human capabilities, reduce response times and errors. Appian RPA has given us not only powerful tools for bot development but also a complete automation platform for workflow management.”

Luis González Gugel,
Robotics Partner Manager,
Deloitte Robotics

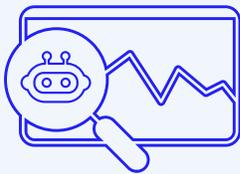
The Situation

As an intelligent automation technology, **Robotic Process Automation (RPA)** has strongly positioned itself as a solution for the automation of high-volume, repeatable tasks, demonstrating its ability to contribute to the operational efficiency of organizations.

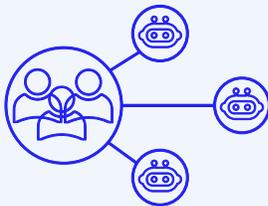
In recent years, the demand for RPA technology solutions and services has multiplied exponentially. Many companies across all industries have adopted RPA as an integral part of their **digital transformation strategy**.

However, as organizations move forward with their robotization initiatives, the **complexity** of projects, **scalability** requirements and **orchestration** needs to automate across systems also increase.

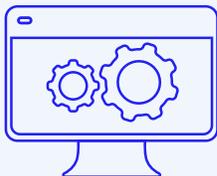
In this context, the Robotics experts at Deloitte are faced with the need to respond to the new **challenges** posed by **intelligent automation projects**:



RPA implementations have a lot of momentum initially but often end up being limited to **simple, departmental projects** that do not progress towards more far-reaching initiatives across the enterprise.



End-to-end process automation involves coordination of **human labor, software bots, artificial intelligence, and other automation technologies**. This is an increasingly pressing need in companies that not all RPA providers know how to address.



Implementing strategic automation programs with **centralized management of robotic activities** is a goal that is still far from being achieved for most organization.

Furthermore, having **multiple RPA solutions** coexist in the same organization only increases the complexity and challenges of governance and orchestration..

The Approach

To respond to the new challenges companies face in their intelligent automation strategies, Deloitte Robotics CoE has incorporated Appian RPA into its solution portfolio because of its unique capabilities in the development, deployment and monitoring of automated processes.

In particular, Deloitte has chosen Appian to provide RPA as a strategic technology because of its power for **centralized robotic governance** that is especially important in processes that require:

 CONFIGURABLE AND SCALABLE BOTS	Automatically adjust tasks and execution capabilities according to variable demand peaks and business needs.
 COMPLEX ECOSYSTEMS	Infrastructures with multiple resources and processes running in parallel. Appian RPA enables permission management, making it easy for each user to access only the bots they need while allowing administrators to maintain centralized management of the automation ecosystem.
 ADVANCED RESOURCE MANAGEMENT	Enable and disable the resources where the bots are running for better orchestration. Central deployment of bots from the console to the resources allows for agile and continuous production.
 CLOUD DEPLOYMENT	Cloud deployment options simplify access and RPA adoption while meeting the most stringent security requirements..

For Deloitte's Robotics team, a key aspect of successful automation deployment is advanced **exceptions management** functionality that enables rapid problem resolution, integrating human resources into robotic workflows without friction.

Another differentiating factor that has made Appian RPA a key solution for Deloitte is **Java development of bots**. This provides programmers with greater control to create sophisticated and highly customizable bots to handle even the most complex use cases.

Because of all these features, Appian RPA is chosen by Deloitte's CoE as a leading solution for the **automation of critical** and particularly **complex processes**. This enables developers to have an alternative option in projects where other solutions often fail, such as automation in environments with multiple systems or the management of many business exceptions, or high-volume documents scanning.

The Implementation

The proven capabilities of Appian RPA, combined with the **multidisciplinary experience of the Deloitte Robotics experts**, has allowed the Center of Excellence in Madrid to successfully consult companies in all phases of their automation journey and projects: from the definition of the strategy, through the design and construction of bots, their implementation and even the control of their daily operations.

Deloitte's CoE guarantees the right **process automation implementations** through five phases:

- 1 **Developers analyze the process then instruct and program every bot.**
- 2 **Analysts assign and monitor RPA bot's activities.**
- 3 **Each bot is located in a customer's environment and interacts directly with their business applications, without compromising the IT infrastructure.**
- 4 **Business users review and resolve any exceptions or anomalies that may occur in the bot's daily operation.**
- 5 **RPA bots amplify their value by interacting with numerous platforms and applications, collecting continuous feedback to monitor and analyze centrally.**

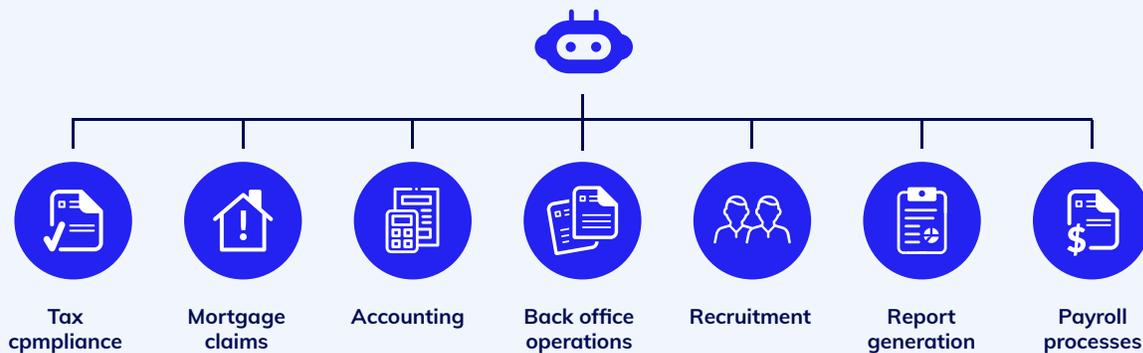
The set of these phases allows programming the bots to **execute complete end-to-end processes** involving humans only in the resolution of exceptions.

Deloitte attributes **agile methodologies** that enable rapid automation deployments as an important part of every successful RPA project. In addition, the Appian RPA development tools enable programmers to build and deploy bots in a few weeks, with almost immediate impact on process performance.

The Solution

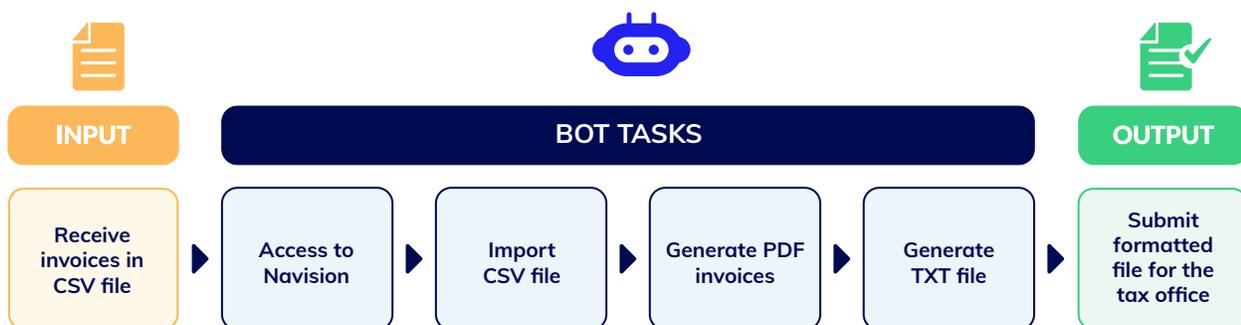
The Deloitte Robotics CoE currently has **over a hundred automated processes** with Appian RPA.

Among the multiple use cases of the platform, the key processes in the financial and human resources areas stand out, including:

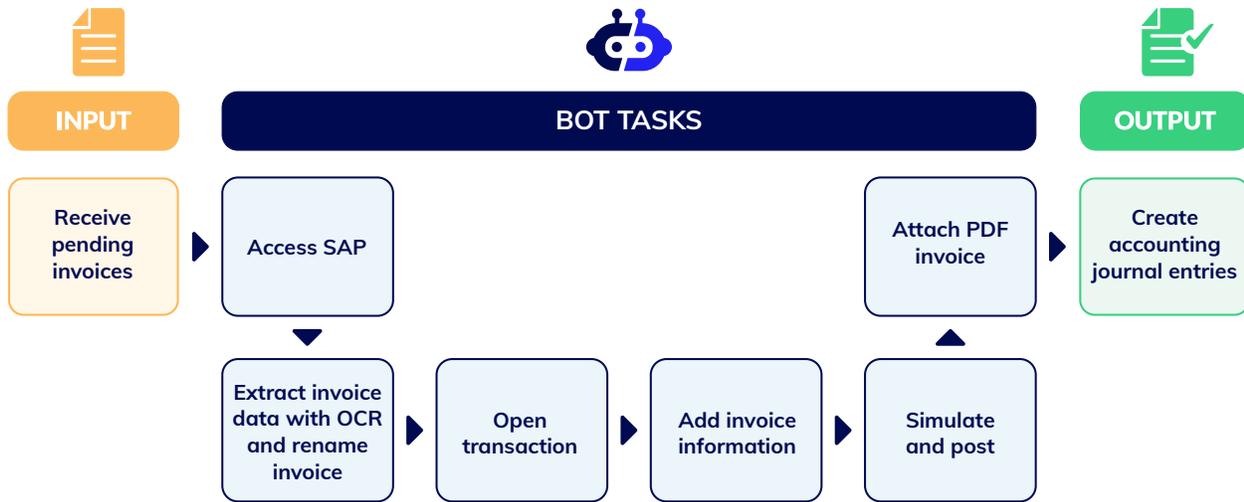


The flexibility and adaptability of the solution, in addition to the programmatic approach to robotics development, has allowed Deloitte to approach the automation of **very diverse processes** where multiple applications and systems intervene, for example:

- **VAT recovery:** This process consists of accessing the ERP system and generating formatted documentation to the Tax Agency to claim back the Value-Added Tax (VAT).



- **Invoice posting:** This process combines RPA and Optical Character Recognition (OCR) capabilities to enter and post invoices in SAP.



The different robotic processes are managed centrally, giving the CoE global insights of the bots performance for greater visibility, security, optimization and cost control. The CoE also creates and manages reusable Java components in shared libraries for new projects to accelerate development time.

The Results

The combination of Deloitte's Robotics experts with the powerful robotic automation and orchestration platform provided by Appian RPA has enabled the Madrid Center of Excellence to become a **standard in intelligent process automation**, achieving important results:



100+ robotic processes
deployed within 2 years



41,000+ hours
utilized in one year



1,000,000+ items
processed annually



Achieved ROI
in less than one year



Increased process efficiency



Reduced errors in critical processes such as procedures with the Tax Agency, minimizing penalties for human error



Enabled full traceability of processes including execution reports and processed items



Allowed greater agility in regulatory compliance

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Deloitte Robotics processes the VAT recovery of several clients from the Telco and Utilities sector, where they achieved the following results in 2 years:

- ✓ **Recovered more than 100 Million Euros.**
- ✓ **Processed more than 8 million invoices with only a team of 4 people.**
- ✓ **Saved more than 15 FTEs.**

A Deloitte client, Lopesan, a hotel group with more than 20 hotels in Spain, the Dominican Republic, Germany and Austria, has automated its Collection Management process and achieved the following outcomes:

- ✓ **96% reduction of manual tasks related to Collection Claims.**
- ✓ **40% reduction of manual tasks related to the Compensation of the collection.**
- ✓ **ROI less than 1 year.**
- ✓ **Annual savings of 50,000 euros in the Collection Management process.**
- ✓ **Decrease in claims issued for correct compensation**

“ Appian RPA is our first choice for automating critical or complex processes. Leveraging reusable components has allowed us to reduce the development time of a bot by 15%. ”

Adrián Rossignoli,
Manager, Deloitte Robotics



Appian helps organizations build apps and workflows rapidly, with a low-code automation platform. Combining people, technologies, and data in a single workflow, Appian can help companies maximize their resources and improve business results. Many of the world's largest organizations use Appian applications to improve customer experience, achieve operational excellence, and simplify global risk management and compliance.

For more information, visit appian.com/rpa