

CHAPTER 3

Robotic Process Automation (RPA)

2) Allianz: Managing the lifecycle of RPA

Stefan Weih, Allianz Partners

Allianz is a DAX-listed insurance and service company. Allianz Partners is part of this group and defines itself as global experts in assistance, health, travel and automotive solutions offered around the world through the commercial brands: Allianz Assistance, Allianz Care, Allianz Automotive, and Allianz Travel. The Organizational Improvement and RPA teams are part of Allianz Partners with the mission to promote performance excellence by developing and implementing productivity, cycle-time, and quality enhancing process automation solutions. The interview partner is in charge of the global team responsible for the introduction and the roll-out of smart automation technologies.

While RPA is the least disruptive technology discussed in this book, this case outlines a best-practice approach of the implementation process using internal expertise.

Background: How we started

We began our RPA journey around four years ago. It was the starting point for new automation technologies other than beefing up and improving the core systems that we have as part of our overall IT landscape. The main reason for the need for this new, or any new technology, was to complement the classic automation as we are in a phase of transforming towards a new IT world and to accelerate change. Adjusting a core legacy system that is 20 plus years old is costly, time consuming, and mostly, you are even lacking the development resources. The backlog actually piled up rather than getting smaller. In addition, the business world is transforming, and we need to keep up with young,

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leaner competitors that do not have the challenges of a large grown group. RPA, by its nature, and being independent of the underlying systems, delivered what we were looking for. It was quite handy and fast to deploy. We also use it as a bridging technology to new systems. It bridges between the new target solution and the legacy systems; not only for pure data migration, but also to maintain the process in the time of transition.

We were among the first movers in our insurance group and in a way we were lucky to pick the right approach to create the operational impact that we were looking for and a new mindset, which is also required these days.

Implementing RPA: The three step approach

Right from the beginning, we were confident that this is a technology to stay. We did not want to rely on external resources. While we relied on external consultants in the beginning to speed up our learning and to leverage experiences from other industries, we aimed for transferring knowledge and training people on automating applications. Luckily, or you might say due to the character of this technology, within an intense one to two-week training, you achieve a lot if you have the right skilled people that you feed into such a training program.

We started with a brainstorming and a small pilot, a very easy case, to obtain the buy-in of the local units. We achieved the proof of concept and with it the proof that it is working and delivers benefits to local business. Then we had the two other components. We had the training so that right after the pilot the local team did not rely on some remote central team to help continue the journey, which often is a reason for failure of innovation projects. As a last piece during the implementation of that first use case, we already had created a prioritized pipeline of potential new applications with the local experts. Thus, the business, right after the pilot, was ready and knew exactly what to do next.

From single applications to a portfolio of bots

We started with projects that promised an early win. Let me give you two examples. One is that our customers send us requests via email. What happened in the past is that a human colleague had to go into the email program, read it out, and key it manually into the system, or maybe even writing back. Now, we automated that part of the process for any standard templates that we received. We used the RPA bot as a kind of distribution mechanism for incoming emails. Another example is to support the automation of part of the processes such as invoice checking. While in some countries this is already a fully automated process, in others, it was still largely manual. Here also the technology helped us to bridge local proprietary solution with the core

system on checking between what the invoice actually told us to pay, and what we had calculated, and finally, based on some matching, approve it and directly automate it.

Right at the end of the pilot, local management was very impressed of what you can achieve within only two or three weeks. Some of our countries really surprised us by growing their portfolio within one year from zero to 30 plus bots that delivered a sustainable business impact. Marketing by itself, therefore, was not so necessary. It was a kind of a wildfire spreading by itself. There were only very few which, for other reasons, have been reluctant to do it.

Within four years, we grew our fleet from zero RPA bots to a nice midsize three-digit number of bots.

Managing over the lifecycle

Concerning the organization, we relied for the pilots and the roll out on external resources to speed up the whole process. Right after the pilots, it became less and less. At the same time, we established a central competence center, which for some core application was in charge of the RPA bots used across a wider range of business units/countries, and which could help the more remote business units with expertise on certain use cases. Building up this community of now more than 80 developers around the globe in that space was very interesting to see because we were actively managing the community. In the beginning, and now it's kind of running itself because they reach out to each other asking for help.

We built up the developer pool largely internally. We met very mixed experience around the globe. In the beginning, we started with high skill internal people. They were really a great advantage. In Brazil for example, a former teammate wanted to involve himself personally. He took the opportunity, became a developer, and accelerated the journey significantly, as he knew the business processes by heart from his own experience. Thus, the documentation of the process and its feasibility for an RPA technology was done by one person.

Today, we are in a quite mature stage. Mature in terms of organizational size and expertise that is using this technology, but also in terms of further potential to harvest this technology. Due to the prioritization principle you maximize business impact right from the beginning. As you grow, you come to the smaller and smaller fish where you then have to decide on a case level. Is it really still worth? Is the maintenance effort bigger than the business benefit of automating that piece? Not every country in our global organization is at the same level though, but overall it matured.

Yet, while the transformation on the core system side is continuing, we might still see RPA as a technology to bridge systems. Some applications might be replaced, others added.

The interview was conducted in May 2021.

Dr. Stefan Weih

Head of Smart Automation Program and Advanced Data Solutions,
Allianz Partners

As Head of the Smart Automation Program, Stefan was responsible for accelerating the digital transformation in Operations through the global rollout of smart automation technologies (incl. Robotics Process Automation, Chat/ Voice Bot, Claims portal, web app & Process Mining) across all lines of business (Travel Insurance, Roadside & Medical Assistance, Health, Automotive). He had end-to-end responsibility for defining and implementing digital roadmap with Group-internal and external development/ R&D partners and was Allianz Group-wide global product owner for Process Mining.

In his current position, he turns his previous role into line function, expanding the scope for Business Intelligence, Global Data Platform(s), and Global Telephony (comprehending conversational AI to truly omni-channel platform).

Before joining Allianz Partners more than 5 years ago, Stefan served as a Business Manager at German insurance group Allianz.

He received his PhD (Dr. rer. pol.) in Strategic Management from the university FAU Erlangen-Nürnberg.

3) Turkcell: Insourcing RPA as digital competence

Yeliz Gülmüş, Turkcell

Turkcell is a telecommunication and technology services provider, founded and headquartered in Turkey. It serves its customers with voice, data, TV and value-added consumer and enterprise services on mobile and fixed networks.

This case shows how executives can move from using external consultants for the initial implementation to an internal, proprietary and IT department-based solution provider.

Background: Starting RPA development

At Turkcell, we have two major projects. The first one is the digital transformation of our company and the second one is called Dynamics. Both projects have a common purpose, i.e., to digitalize our processes, simplify them, and structure our departments with the aim to increase our earnings. That's why we turned to RPA.

The search for our RPA technology took us more than one and a half years. We started with examining the tools available and worked with EY, the consulting company, to select what we needed and eventually implemented RPA.

In the beginning, our ICT teams used a trial version of UiPath. The team members taught themselves how to use UiPath and automatize their processes. In addition, we had people in Network Technologies who knew how to write Python and/or Selenium. Beyond that we had no RPA teams.

Where we use RPA

We have different scenarios: Our Finance Department will use RPA when dealing with banking, Supply Chain Management for trading issues, HR when entering CVs or to automatize their ERP (Enterprise Resource Planning), Network Technologies for change management, IT for their alarm mechanisms, which are huge operations.

By the end of 2020, we planned to have automatized more than 100 processes. This means that we will save more than 10,000 person hours per month.

Take the Finance Department. There people spend a lot of time manually entering data and sending them to banks. Automatizing these processes will make us much more effective. Also, the number of operational mistakes will be reduced. Overall, we want people to work on strategic questions rather than invest time in operations.

However, we are still new in this field. We are learning, extending our infrastructure, trying to encourage people to use robots and manage them effectively. Right now our main target is to make the whole infrastructure work

smoothly and create an internal RPA culture. After that we will concentrate on cost-saving opportunities.

By now we have developed our own RPA software

For the implementation process we used internal and external resources, including support from EY. At that time, we still needed to discover our roles and responsibilities. What should we do to construct the necessary infrastructure? How should we train our employees in order to expand RPA and how would we benefit from this technology? So we created a small organizational development team with people from different departments – from IT, Board of Directors' office, HR, Network Technologies – plus the external EY consultant. Our next step will be to hire a number of RPA developers.

In the end we were able to create our own RPA software called Ghost, which Turkcell Global Bilgi developed. We still need to expand its features, but in the future Ghost may be one of the RPA tools globally available. Right now we are teaching Ghost to our people who already know UiPath, Automation Anywhere, etc. They adopt very fast to Ghost.

In addition, we proceed to develop scenarios for Ghost, discuss new features with Global Bilgi, who will then add these features to Ghost and continuously improve it. It is a co-creation process.

So far Ghost has some AI features, such as image processing, but we still need to extend them by adding more advanced tools and web services. For example, we already have OCR (Optical Character Recognition), but the situation could be better.

We know that UiPath and Blue Prism are working with additional features, which are AI-based in order to decipher a text but also to move more flexibly across web pages that change their design, so that the robot is not lost when there's a design change but automatically finds the right field by itself.

We still have some problems when web pages are changing and our robots register errors, but we plan to overcome them with image processing.

From the organizational development team to our center of excellence

Our organizational development team now works with each department in order to select process experts. These experts are familiar with RPA and know the needs of their department. Combining these two aspects, they decide which scenarios should be developed for RPA. Then we at the center of excellence of our AI team will start the development.

As I mentioned above, we have two big projects in Turkcell. The first one is the company's digital transformation process, the second one is called Dynamics. The office of our Board of Directors manages Dynamics, of which the RPA project is one part.

To introduce RPA internally, we went to each department manager, explained RPA and described how their department would benefit from it, presented the advantages and disadvantages. We also use our internal communication channels to send infographics to all employees in order to familiarize them with RPA and increase their knowledge about this tool.

RPA champions and the challenges of governance

For now, we have 42 robots and 32 developer scenarios. We are still working on the infrastructure, because it is vital to have robot users establish their own virtual machines and manage them. Moreover, we (i.e., the Center of Excellence) determine «RPA champions» and train them so that they introduce RPA in their departments. Right now we have more than 30 RPA champions in five departments, namely Finance, Supply Chain Management, HR, and Network Technology.

In addition, we are working on RPA governance, as people in ICT and Network Technologies want to develop their own scenarios using Ghost. There we may face difficulties as they will prioritize their scenarios and develop their own robots. However, we have established control mechanisms in order to evaluate their plans by asking is it really worth to spend efforts on a scenario? As a center of excellence team, we need to successfully deal with all Ghost-related issues.

Practically, we have two options. One is that the RPA champions name the specific process they want to automatize and we develop the scenario. The second option means that the RPA champion, who already knows how to use UiPath etc., learns how to use Ghost. Then their department can try to develop their scenarios by themselves. Sometimes it is difficult to manage people, in particular, when you cannot monitor them. That's the way it is when you have individual processes which have been initiated in a decentralized way.

Some people say RPA is just a tool to preserve legacy IT systems and that it may be more efficient to have one unified software that combines different functionalities rather than, say, two legacy softwares and a robot in between that transfers data from one to another.

We, too, are aware of these difficulties, but we are still learning. And learning means to improve and solve problems, but also to sometimes make mistakes. For example, we spent almost one week to develop one scenario and then found out that the platform in question will change at the end of this year. So all our efforts could be trashed.

The future of RPA in our company

Currently we are working on the infrastructure and improve Ghost by continuously adding new features. We have established a community platform where

our RPA champions communicate with each other, ask questions and receive answers. In addition, we continue to encourage people to learn RPA and implement Ghost in their department.

Furthermore, we work with our Turkcell Academy and design RPA training programs. So far we already have an online training program. The subjects include the basics of RPA, digital transformation, its advantages and disadvantages. There are also videos on how to use Ghost. And, of course, we support our RPA champions, because we know that they will drive RPA adoption within our organization.

In the long run, we believe that we will be able to compete with professional providers such as Blue Prism and UiPath. If we need a specific feature, we contact our technical team. They analyze the feature in question and quickly develop it. At the moment UiPath has some features that are better than Ghost, but in the future Ghost will compete with all tools that are currently on the market.

The interview was conducted in March 2020.

Yeliz Gülmüş

Master Expert AI Technical Product Manager, Turkcell

As a resident of Istanbul, Yeliz has been with Turkcell for more than 8 years. Before her current position, she was Senior Artificial Intelligence Technical Product Manager and Learning Solutions Specialist in the company.

She holds a Bachelor's degree in Computer Education and Instructional Technology of Orta Doğu Teknik Üniversitesi / Middle East Technical University.