


# Robotic Process Automation



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# Operational excellence evolution



## What is RPA?

- **Robotic process automation** (RPA) refers to software that can be easily programmed to do basic tasks across applications, just as human workers do.

ROBOTIC

RPA

AUTOMATION

# RPA evaluation

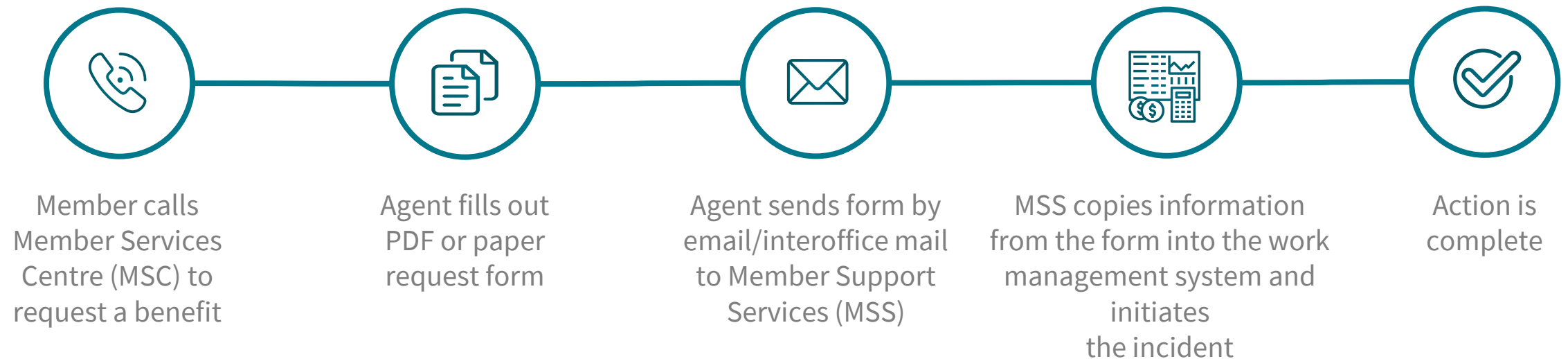
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- Cloud services with data located in Canada
- Flexible starter license packages
- A large public sector client base in Canada
- Could integrate with different applications including M365, non-Microsoft, and custom built applications



# Example 1: Phone call case initiation

Members may call to request a pension estimate. This request starts a manual process to document the request and set up the incident before work can begin.



**This process can take up to 48 hours to complete, with multiple touch points**

# Phone call case initiation

## New digitized and automated process

When a members calls in to request a pension estimate, the request is taken by an agent and automatically set up as an incident.



# Phone call case initiation

## New digitized and automated process



- Required 60 days for development
- Processes several thousand requests per year
- Expected savings of over 150 days manual effort per year
- Turnaround time reduced to five minutes
- Keeps all information in a controlled centralized location

# Ineligible refund calculations

A plan redesign set a contribution rate that too high for a group of a members and as a result those members overcontributed between 2021 and 2022 which resulted in about 3,000 requiring contribution refunds



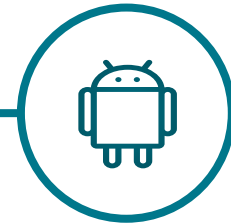
Data for an ineligible refund is calculated in a machine-readable format



Data is validated, and the calculation methodology is tested by the MEE team



Calculations for the refund are performed automatically by IPAS through automated script



RPA software logs into IPAS, enters calculation data and applies disbursement



Payment is sent to the member



# Ineligible refund calculations

## New digitized and automated process



- Required 25 days for development and subject matter testing
- Eliminated 200 days of data entry effort
- All refunds processed within 24 hours

Demo:

UiPath developed solution

**MANUAL**

Processes

**RPA**

Robotic Process Automation





Recycle Bin



Oracle Reports ...



Cygwin64 Terminal



Visual Studio Code



Microsoft Edge



PLSQL Developer ...



Google Chrome



Oracle Forms Builder 12c



11:11 AM  
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# What we learned



## Pick the right use cases

- Processes that can be automated without redesign, use key applications, within a team that can be a champion going forward
- Understand and stay focused on the key “win condition” for implementation



## Team structure must prioritize innovation

- Having the right team at the outset is critical. Prioritize resilience, innovation, growth mindset, problem solving and communication with a passion for delivering and trailblazing



## Keep a flexible strategy

- Don't get bogged down in planning every detail, be flexible
- Ensure there's a plan for scalability, maintenance, and governance once the bot is in place
- Sprawl can be a problem

# What's next for us?



## Create governance model

- Create and implement RPA governance structure to support maintenance and reduce sprawl



## Implement citizen developer program

- Implement a program where non-developer staff may create their own bots to support and automate their own jobs



## Digitize and automate processes

- Program wall-e to perform more basic data entry tasks with the data in a machine-readable format



BC PENSION  
CORPORATION

# Questions?