

**NCOAUG**  
NORTH CENTRAL ORACLE APPS USER GROUP  
**TRAINING DAY**  
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# Case Study - Software Robot Creates Sales Orders in Order Management from Orders in a Customer Portal

Using Robotic Process Automation (RPA) technology, sales orders are created in E-Business Order Entry screens automatically, by retrieving data from a customer's portal

Tom Sheppard  
Chief Information Officer  
Brake Parts Inc.

Glenn Hoormann  
Executive Vice President  
eAlliance Corporation

# Agenda

- Presenters
- What you will take away from this presentation
- About eAlliance
- About Brake Parts Inc.
- Corporate Goals and IT Strategy Alignment
- The Business Challenge
- Robotic Process Automation (RPA)
- Seeing is believing - Software Robot in Action
- Beginning your RPA Journey - The Starter Kit
- Success Factors
- Lessons Learned
- Going forward – Next Steps

# Presenters



**Tom Sheppard**

Chief Information Officer  
Brake Parts Inc.



**Glenn Hoormann**

Executive Vice President  
eAlliance Corporation



# What you will take away from this presentation

- Understand - What RPA is and why the explosive growth?
- Understand - Automation affecting the back office
- Understand - RPA can emulate what a user does manually
- Demonstrate - Complex transaction being performed by an unattended software robot
- Differences - RPA vs traditional IT projects
- Explain - RPA does NOT require API's



# eAlliance Corporation

- Established in 2002
- Headquartered in Naperville, IL
- Oracle Certified Partner
- UiPath Certified Partner & Reseller
- Market leading RPA & CDA Partner
- Proprietary RPA Methodology



The Washington Post



# Brake Parts Inc. (BPI)

- Brake Parts Inc. is committed to leading the global aftermarket as the premier manufacturer of automotive braking components
- Manufacturing plants and Sales offices across the globe allow us to provide outstanding service to customers in all regions
- Global customer base including flagship Raybestos brand, OES, private label and co-branded programs covering passenger car through commercial vehicle applications

## Primary Products

- Friction
- Rotors
- Calipers
- Wheel Hub Assemblies
- Hydraulics

## Corporate Capabilities

- Research and Development
- Engineering
- Testing
- Manufacturing
- Logistics
- Distribution
- Customer Support
- Marketing



**World Class Products. Global Commitment.**

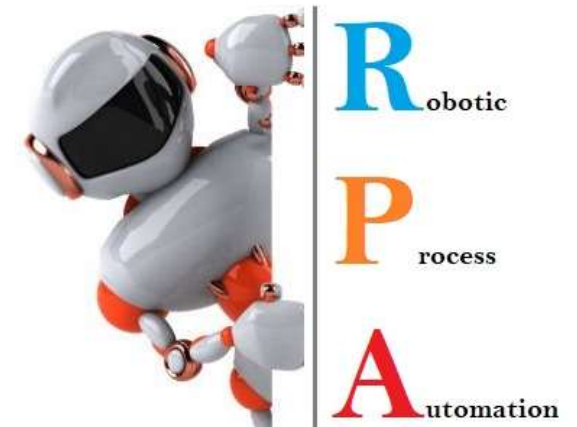
# Brake Parts Inc. – IT Strategic Plan

- What's in the BPI's IT Strategic Plan
  - Enable process automation and digitalize the business
  - Improve / efficient transaction processing and visibility to data
  - Empower faster enterprise wide business decisions and ultimately customer satisfaction
- What is represented in this strategic plan
  - Implement globally, full functioning ERP systems, to enhance business functions and standardize processes and data capture for best in class operations
  - Integrate within the ERP fabric, additional specific functional systems, on-prem or cloud, to better enhance total business value
  - Use business intelligence tools, to capture key data globally in centralized data warehouses, for analysis, dashboards and reporting
  - Investigate and implement the latest innovative technologies, where cost justified, to improve business operations, gain or increase customer satisfaction levels, and to reduce SG&A



# Brake Parts Inc. - Corporate Goals and IT Alignment

- Corporate Goals and IT Strategy Aligned
  - Digital Transformation
  - Continuous Improvement Program
  - Business Process Optimization
  - Automation Wherever Possible
  - Innovation Through Technology
- Robotic Process Automation (RPA) Smart Bots fit into the goals and strategy
  - An innovative approach, using the latest technologies
  - Allows for faster automated access and entry of data
  - Improves efficiency of operations and customer satisfaction
  - Leveraging Robotic Process Automation (RPA) from UiPath





# The Business Challenge

- Demands from growing customer base
  - New and existing customers now expect us to transact using their portals
    - This is in addition to already existing EDI or other electronic processing
    - Assumed driver for this is reduced transmission fees for regular orders
  - Customers have orders from their systems sitting in these portals (100s of lines)
  - Customer penalties assessed if orders are not acknowledged in portals on time each day
  - Orders need to be declined or accepted, then entered into our ERP system
- Our Customer Care Department
  - Customer Care agents are already fully engaged in daily operations
  - This extra load and critical nature of work is stressing the agents
  - Missed orders or ordering mistakes can cost us money (in penalties)
  - No new hires are to be used for these extra tasks



# The Solution - Software Robot (RPA)

- Software Robots to the Rescue!
  - After considering other options, it was time to start a smart bot initiative
  - Research indicated UiPath software to be best in class
  - Selected eAlliance as implementation partner given their expertise and methodology



- Simple as 1, 2, 3 to implement RPA
  - Used a “pilot to production” approach
  - Engaged Customer Care team to record a demonstrate of the daily process
  - Replicated that process in UiPath, comparing to recorded demonstration
  - Validated solution even going against live customer portal, while we watched
  - Tweaked, tweaked, tweaked, for exception handling
  - Took the training weeks off and were running unattended in weeks



# What is Robotic Process Automation (RPA)?

- Software that can
  - Create, copy, update, transfer (FTP) & delete any type of file
  - Enter transactions, run reports, send & receive email
  - Log into any system, application or portal
  - Screen scrape, data scrape
  - Differentiating features of RPA
    - AI Capabilities
    - Machine Learning Capabilities
    - Natural Language Processing (NLP) Capabilities
    - Internet of Things (IoT) Capabilities



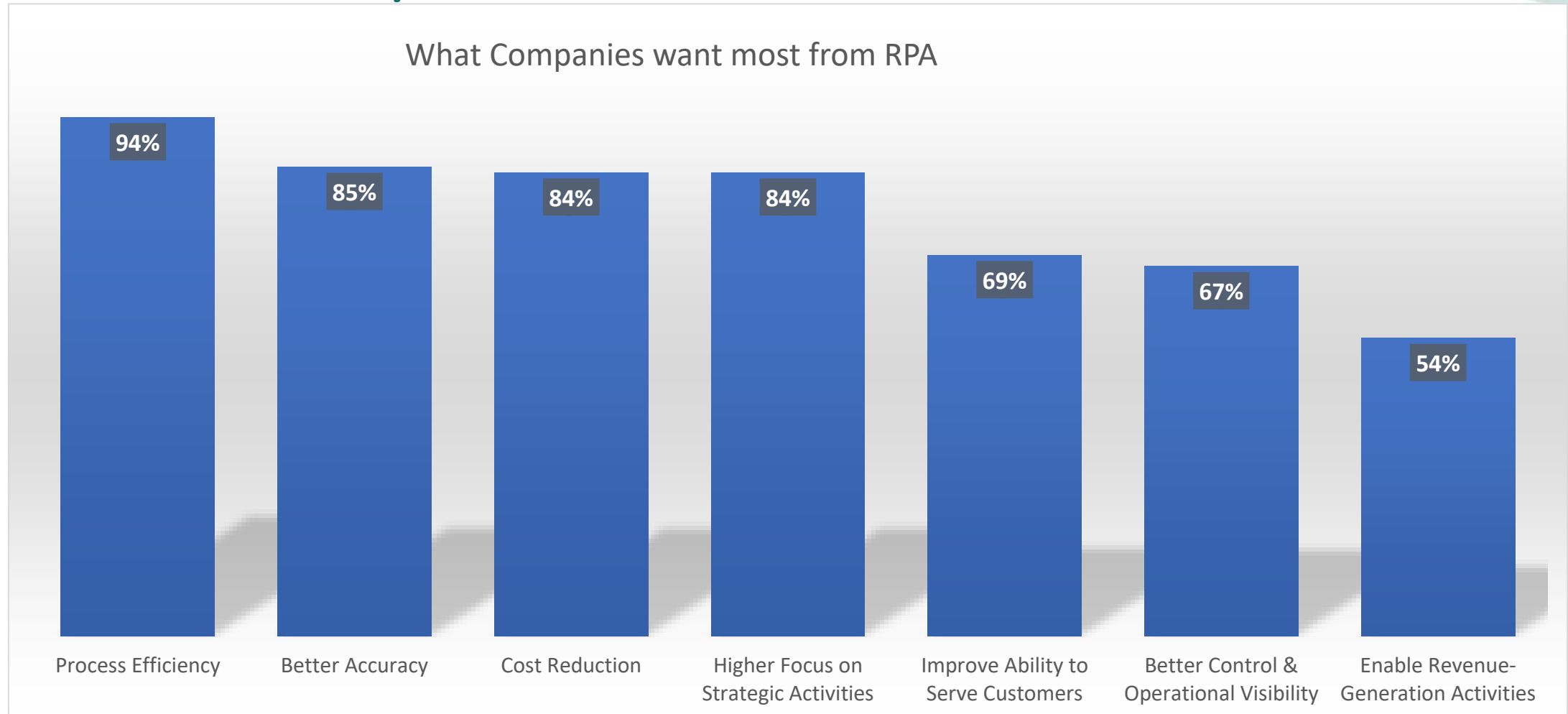
# Why the Explosive Growth?

- Process Efficiency
- Workforce Capacity
- Measurable Returns
- No Disruption to IT Infrastructure
- Quick time to market
- Changes in the Workforce - The Employee Experience



The average company has 900+ business processes. 85% of those can be automated.  
- McKinsey Company, 2015

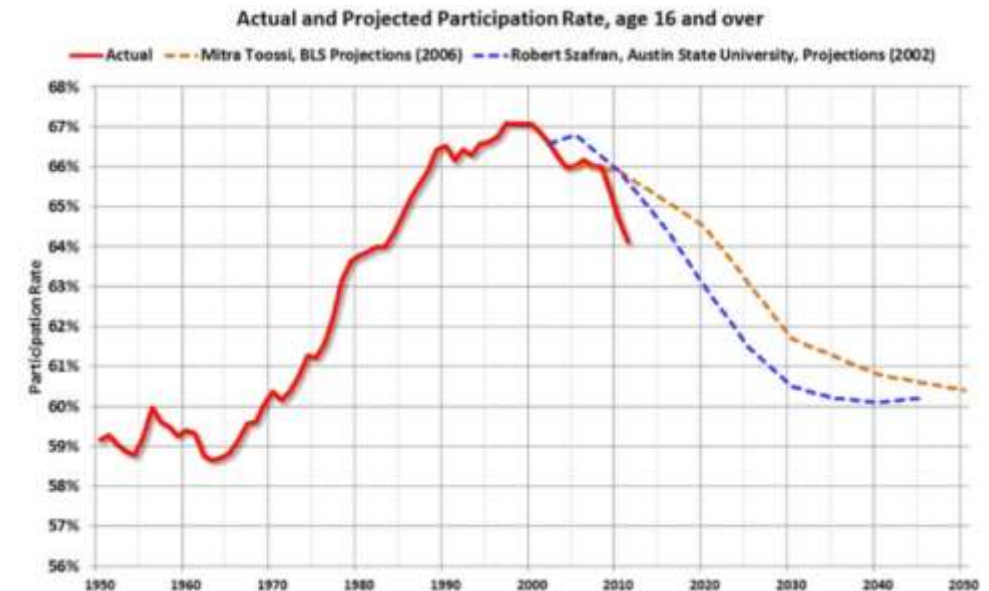
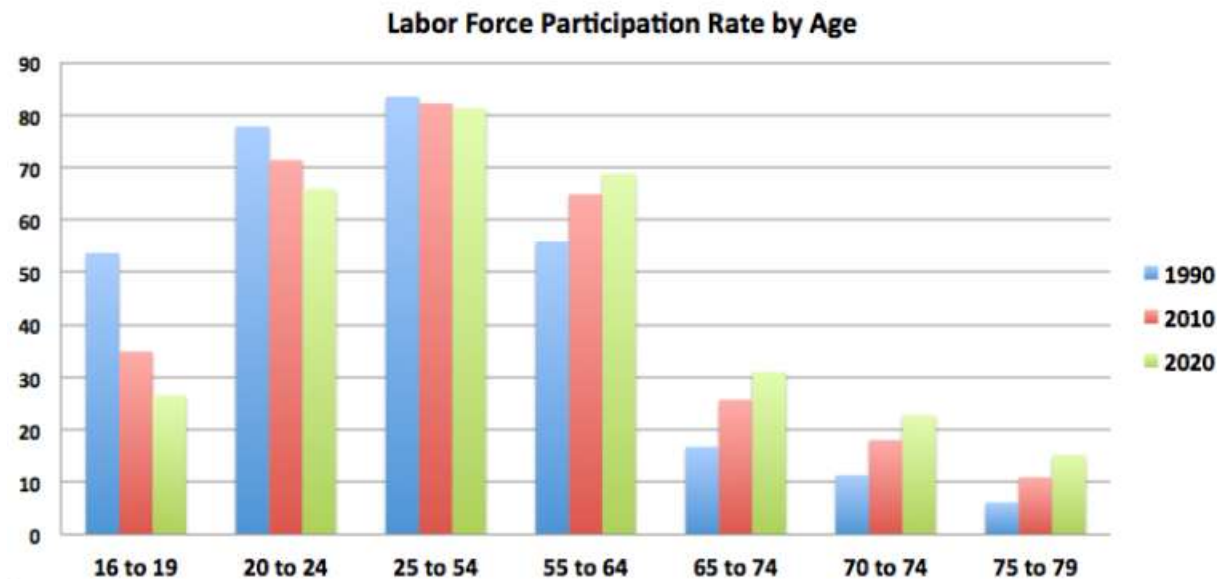
# Process Efficiency



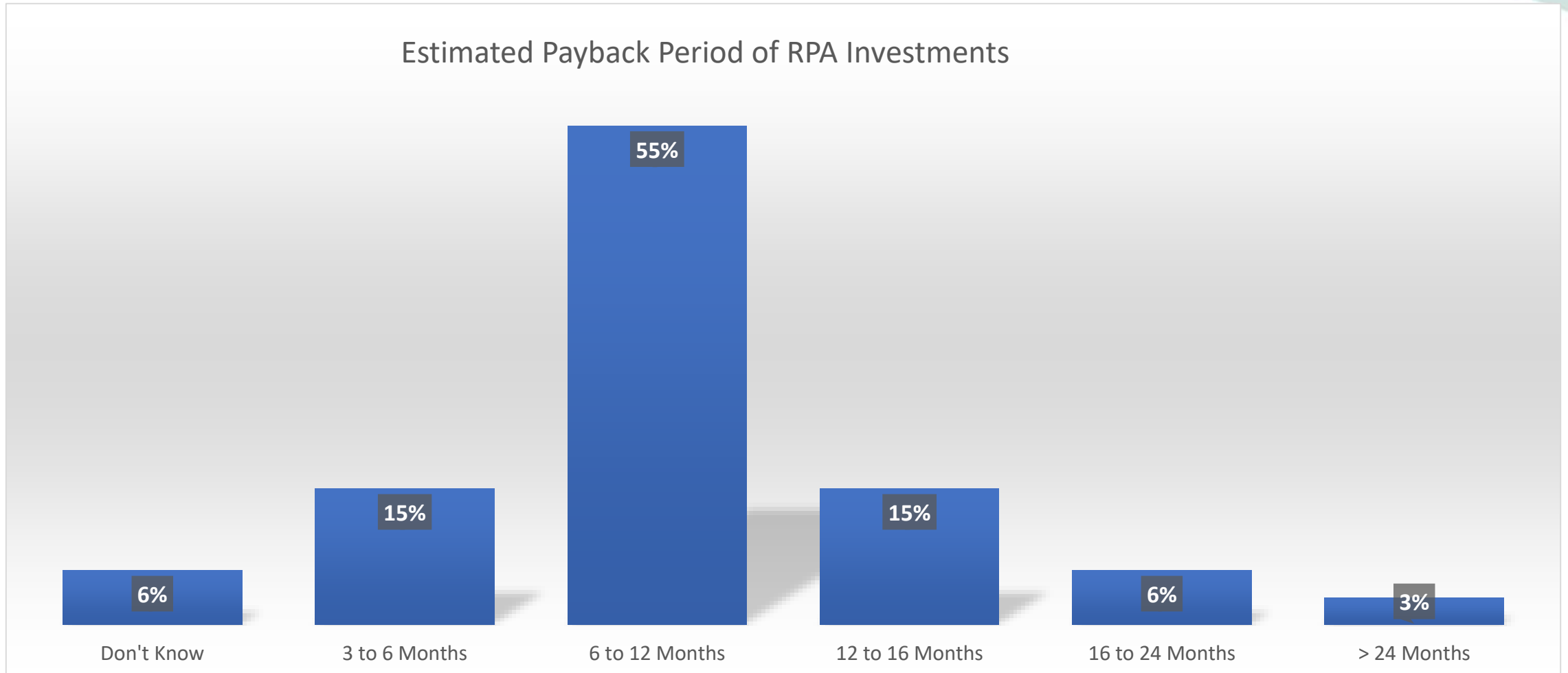


# Workforce Capacity

- Meeting increasing demand from growth and volume
- Filling a workforce capacity gap from turnover and retirement



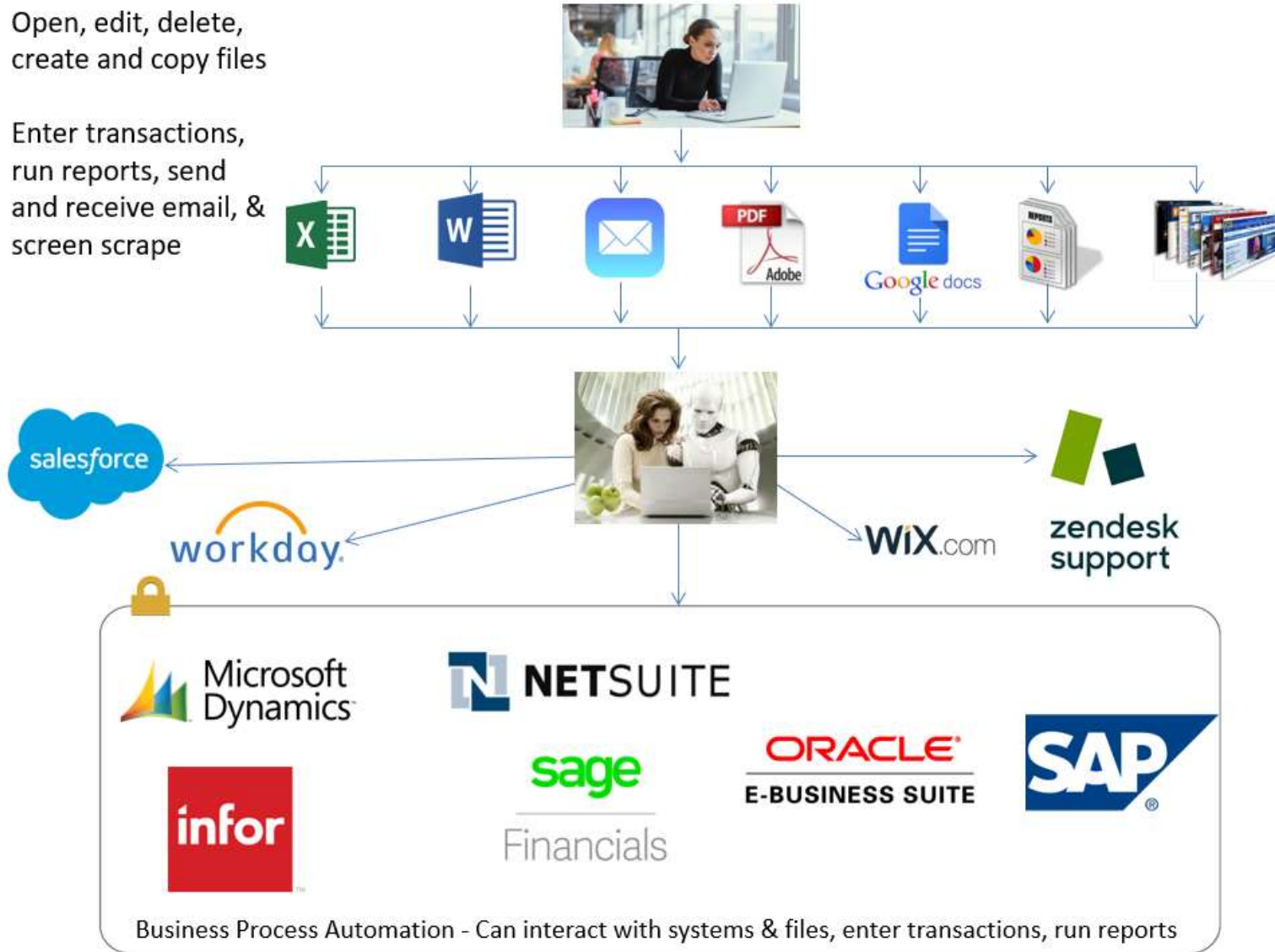
# Measurable Results



# No Disruption to IT Infrastructure

Open, edit, delete,  
create and copy files

Enter transactions,  
run reports, send  
and receive email, &  
screen scrape



# Quick Time to Market

- UI Tools with Record & Workflow capabilities
- No customization to existing applications
- Software robot is just another user
- No code, low code technology

Figure 1: RPA compared to traditional process transformation approaches



# Changes in the Workforce - The Employee Experience

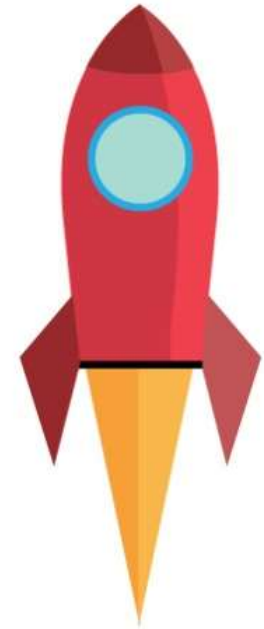
- Employees today struggle to perform under the weight of mind-numbing, repetitive work. They're influenced by their consumer experiences and want similar experiences in their jobs.
- **Employee experience must take center stage:** Sixty-six percent of respondents said that RPA restructures existing work, enabling employees to have more human interactions, and 60 percent said RPA helps employees focus on more meaningful, strategic tasks. In addition, 57 percent of respondents report that RPA reduces manual errors.



# Starter Kit - An easy way to begin

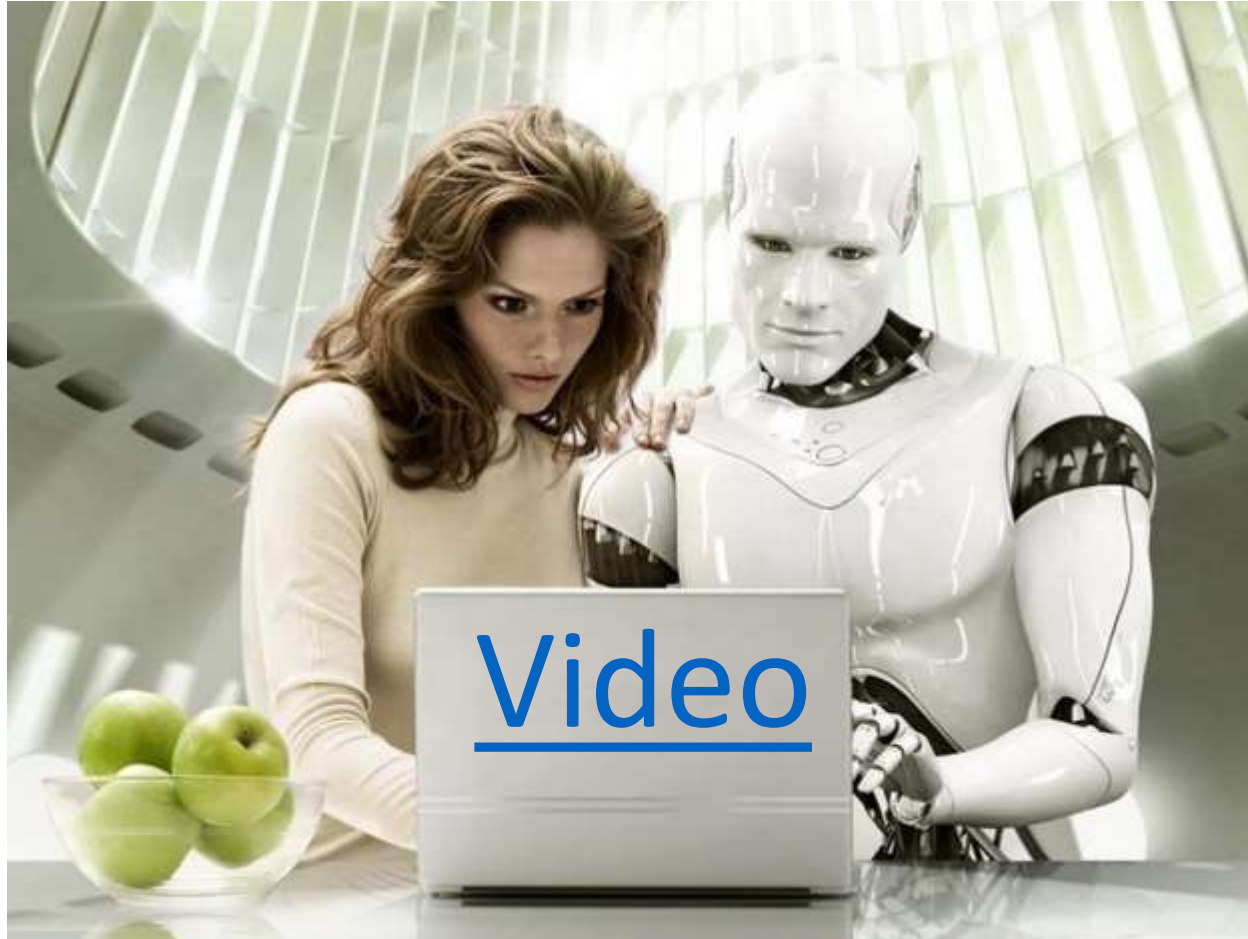
## One Year UiPath Software Subscription & eAlliance RPA Managed Services

- Automation Planning Workshop
- Automation ROI Scorecard
- One Automated Business Process
- Administration & Ongoing support of automation environment
- Automation HelpDesk System
- ROAR (Robotic Operations & Audit Reporting)
- Automation Center of Excellence
- Automation Roadmap



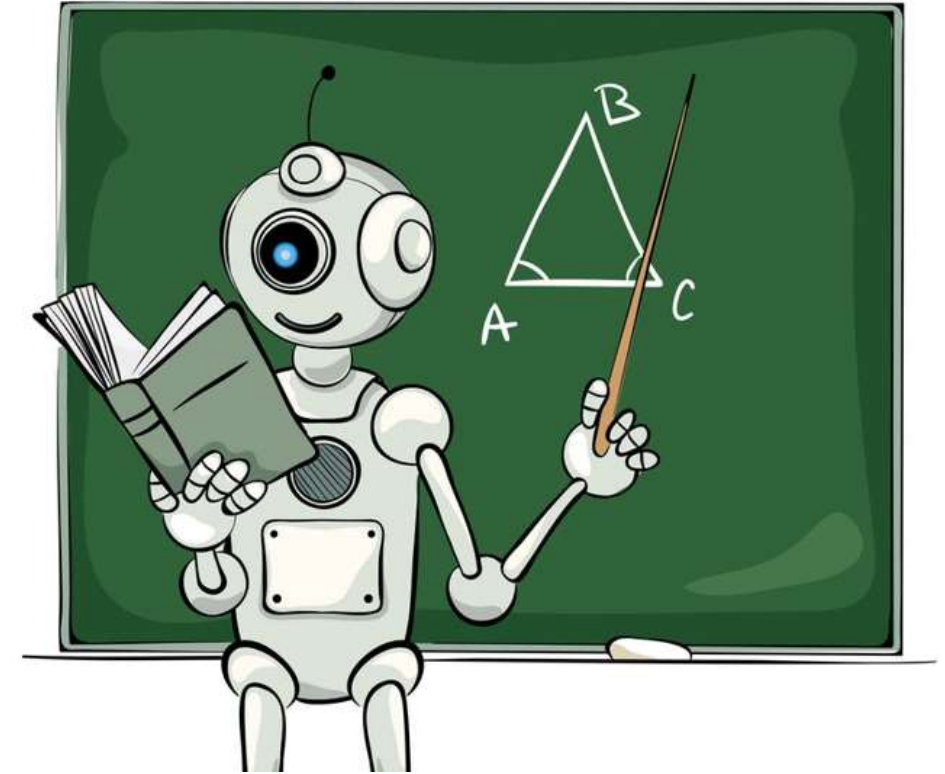
“RPA has been a Win-Win for us.”  
- Tom Sheppard, CIO, Brake Parts Inc.

# Seeing is believing - Software Robot in Action



# Success Factors

- Start with a conversation on expectations
- Must have strong leadership on initiative
- Business and IT partnership is critical
- Bring in an expert partner to jump start program
- Select the right process to automate first
- Record demonstrations of current process
- Ensure all exceptions are mapped out
- Pilot to production – “supervising” bot early on



# Lessons Learned

- Keep it simple to start with, for early success
- Validate expectations on process savings
- Focus on an existing manual process as is
- Try to automate all steps end to end, with no human steps within
- Log work the bot completes, for audit purposes
- Ensure governance and ownership between IT and Business is clear
- Work the math to maximize 24x7 availability of bot to do work
- Remember, RPA is about automating an existing manual process
- RPA development is different from traditional development
- Competition emerged between RPA team and traditional development team



# Going Forward – Next Steps for BPI

- Build an RPA Center of Excellence
- Train internal IT staff on the technology
- Advertise successful RPA processes
- Build out a second bot infrastructure, for ongoing testing efforts
- Build a portfolio of bot candidates and prioritize appropriately
- Build, maintain and seek out reusable RPA code modules





# Going Forward – Next Steps for you to get started

- Select a strong business and IT team to lead effort
- Identify key processes to start with
- Research RPA solutions that work for you
- Find a partner with appropriate experience
- Get started and enjoy the ride!



# Q & A

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