

Getting Intelligent Automation Right



When implemented judiciously, intelligent automation transforms workflows to reduce costs, improve service delivery and free up staff

*for more satisfying work. **Jeremy Hogg**, vice president of public sector and federal sales at Kofax, shares strategies for doing intelligent automation the right way.*

What is intelligent automation?

In a general sense, intelligent automation is a combination of technologies that work together to achieve a great automation outcome. Those technologies include AI, RPA, workflow technologies and document processing technologies like optical character recognition. When done well and integrated succinctly, that combination creates an intelligent automation platform.

How are government organizations using intelligent automation?

There are lots of ways, but finance functions, HR, case management and benefits onboarding spaces have all seen big strides in automation. For example, we are at the forefront of a large program in California, helping process insurance applications as part of Covered California. Everything from the initial documentation that gets submitted—understanding what that documentation is, extracting and moving the data through intelligent workflows and then using robotics to update various systems—is brought together through intelligent automation platforms. The program has seen dramatic improvements

in terms of delivery of services to constituents, application processing time and fewer human errors.

What technology solutions must be in place for organizations to get the most benefits from intelligent automation?

I wouldn't say specific technologies must be in place. What's more important is that organizations are ready for the change. In recent years, technology firms have pushed to be more open and capable of working with other technologies as well as to be modular so those technologies can plug in in different ways. Between what you plug in and what's already there, you can usually solve for the technology part. Having an organizational mindset to go through that change and also understand your processes as the organization changes is one of the biggest indicators of success. Preparing human resources for that change has to be part of any automation project.

What strategies help organizations truly transform digital workflows?

We've seen the most success where there's initially enough investment to have an impact and get the organization behind it. Projects that are too small often pass below the visibility of executive leadership and tend to die on the vine. At the same time, projects can't be more than the organization can chew at one time. The Covered California project started in a discrete area around document processing. Over time, they decided to apply analytics to it, and then improve workflows. Eventually, they added robotics to move the data to various systems. It became this very large but modular

step-by-step layering in of different levels of automation. All of this resulted in an incredibly robust automation system that handles 50 million records a year and 300,000 processes per month, but it was done judiciously.

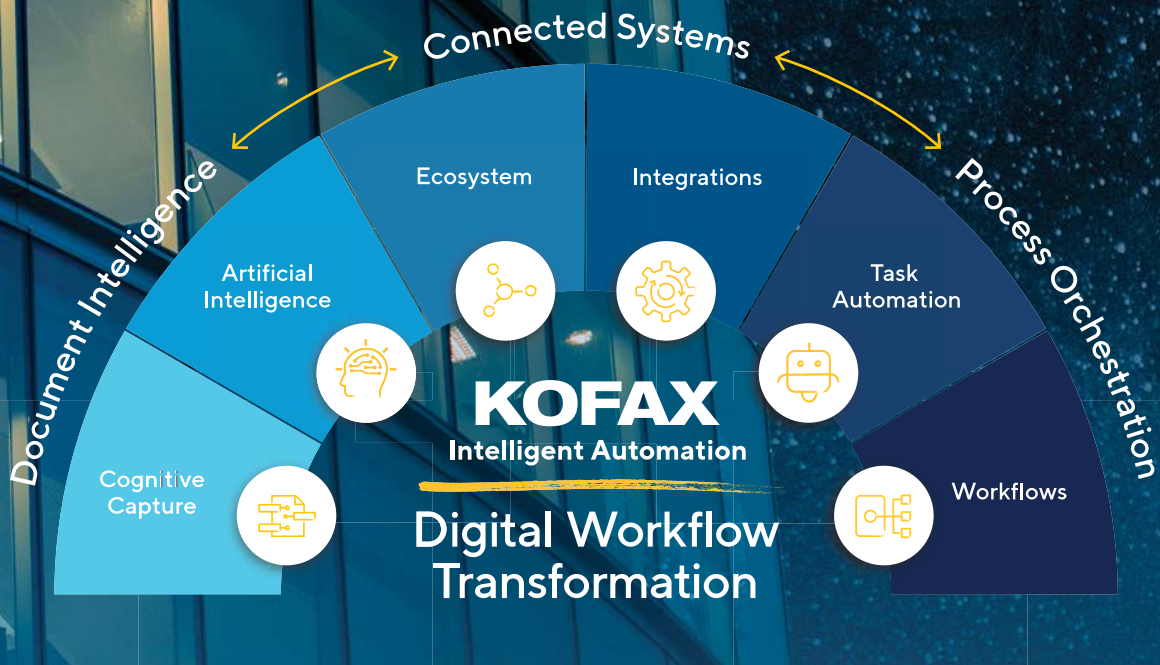
How can organizations prepare their IT and business bench for automation?

Many platforms require developer and programmer skillsets to do these advanced projects. There's been a large shift toward no-code/low-code environments, which can allow people who aren't programmers or developers to be part of the process. One of our customers built their entire robotics team out of former subject matter experts that own business lines. They said, "We want you to develop the processes to automate this because you understand the process and the business really well. We'll teach you the technology. And we don't need you to code at all because it's a no-code platform."

What approaches help pave the way for greater maturity and success as organizations pursue automation?

Good planning, understanding what the technology can and can't do, playing to the strengths of the organization and then charting a plan that the organization can get behind. At some level, you're trying to win over hearts and minds on how this will help people do their jobs, so it's important to get the right team of individuals around that and pick the right parts of the business. Most people don't want to do the rote, day-to-day manual work that machines can help with, so a good strategy is to identify those rote processes first, build the maturity model around that and then layer in other technologies over time.

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