

3 Steps to Start Your RPA Journey

Naved Rashid, Associate Principal Analyst
Saikat Ray, Senior Director Analyst

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By Analysts [Naved Rashid, Saikat Ray](#)

Initiatives: [Application Architecture, Development, Integration and Platforms](#)

Application leaders often fail to achieve the cost savings and speed to value promised by robotic process automation. Use this research to learn how to identify and select the most suitable use cases and vendors and how to run a successful proof of concept.

Overview

Key Findings

- Robotic process automation (RPA) initiatives frequently fail because application leaders select use cases that are complex or unstable or that have too many dependencies.
- Application leaders often struggle to investigate which RPA vendor and product ecosystems are best suited to their use cases.
- Vendor-driven product demonstrations usually don't provide the level of detail needed for stakeholders to determine which product will best meet their needs. They often result in hype and unrealistic expectations about the use case or vendor platform.

Recommendations

To start RPA initiatives, application leaders responsible for application architecture, development, integration and platforms should take the following three steps, in order:

- Identify and select suitable use cases by assessing them against stability, scalability, scope and complexity parameters in order to achieve the best ROI.
- Shortlist the most suitable vendors by using our list of key considerations to meet current and future needs.
- Test-drive the shortlisted vendors' products by running a well-scoped proof of concept (POC) for critical use cases.

Introduction

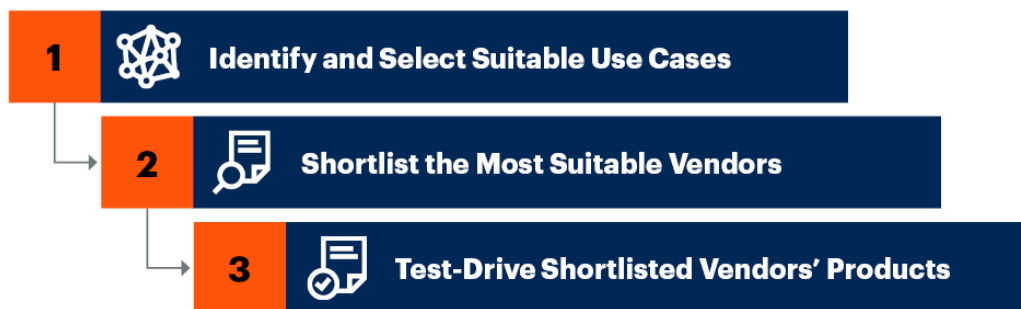
Application leaders are increasingly looking into RPA as a tactical automation option to automate routine manual and repetitive processes and deliver value quickly by emulating human transaction steps, mainly via orchestrated UI interactions. Gartner sees the RPA software market as one of the fastest-growing segments in the enterprise software market. It is expected to reach over \$3 billion by 2024, on the back of double-digit growth rates (see [Forecast Analysis: Robotic Process Automation, Worldwide](#)).

RPA has democratized integration and automation, leading to growing business adoption. However, application leaders often struggle to identify and prioritize the most suitable use cases, select the right vendor and perform the right POC. As a result, many RPA initiatives fail, thereby delaying project timelines and increasing the long-term total cost of ownership.

Application leaders are often confused about how to start their RPA journey. To start RPA projects, they should use this research to pick use cases that align with their business priorities, select the best-fit vendors and launch an effective POC. Figure 1 summarizes the three steps.

Figure 1: Start Successful RPA Initiatives in Three Steps

Start Successful RPA Initiatives in Three Steps



Source: Gartner
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Analysis

Step 1: Identify and Select Suitable Use Cases

One of the most critical determinants of success with RPA is whether the most suitable use case is selected.

Identifying and prioritizing RPA-suitable use cases represents the biggest challenge for RPA deployments, because they require both business process knowledge and technical expertise.

Application leaders should test their use cases across stability, scalability, scope and complexity parameters to identify and select the most suitable use case for RPA.

Table 1 gives the four parameters against which to determine the most promising use cases for RPA.

Table 1: Parameters for Determining Suitability of Use Cases for RPA

<i>Parameter</i> ↓	<i>Questions to Ask Yourself When Evaluating Use Cases for RPA</i> ↓	<i>Guidelines for Selecting and Prioritizing Use Cases</i> ↓
Stability and predictability	<ol style="list-style-type: none"> 1. Is your candidate process <ul style="list-style-type: none"> ■ Stable? ■ Standardized? ■ Predictable? 2. Will you perform the task the same way today, tomorrow, or even after a month or year from now? 3. Are there any major upcoming changes to the process? 4. Is the process part of a routine? 5. Does the process involve subjective decision making? 6. Are process maps available for the whole process? 	<ol style="list-style-type: none"> 1. You can optimize your RPA-building efforts by prioritizing processes that are: <ul style="list-style-type: none"> ■ Stable and structured. ■ Likely to have very few exceptions and to apply to very few scenarios. ■ Rule-based. ■ Without significant subjective decision making.
Volume and scale	<ol style="list-style-type: none"> 1. What is the volume and frequency of the process that warrants automation? 2. Will automation directly lead to cost savings, increase revenue and avoid risk? 3. Is the process isolated or a part of an enterprisewide effort? 	<ol style="list-style-type: none"> 1. You can amplify your benefits against the unit cost of automation by choosing a high-volume and standardized process involving more FTEs. 2. You can list potential benefits that will accumulate.
Scope	<ol style="list-style-type: none"> 1. Is your use case granular enough? 2. Can you logically break down the process into different segments? 	<ol style="list-style-type: none"> 1. Enables you to be tactical in planning further. 2. Acts as a base for your RPA roadmap.
Complexity	<ol style="list-style-type: none"> 1. On a scale of 1 to 10, how complex is the process that is to be automated? A higher number of business logic steps equates to greater complexity, so look for less complex processes first. 2. How many types of applications will be accessed ? 3. How many steps does the process have? 4. How many times will the UI of the application platform change while the bot is interacting with it? 5. Will the bot perform complicated tasks, such as image scraping? 6. Is the target environment or application access in a Citrix workspace or a virtual desktop solution? 7. Is a test environment available? 	<ol style="list-style-type: none"> 1. Ideally, for a use case to be a less complex, it must: <ul style="list-style-type: none"> ■ Have no more than 20 process steps. ■ Involve no more than three application platforms that the bot will touch. ■ Have a UI and a process that do not change very often.

Source: Gartner (January 2021)

For examples of where RPA can be used, see [When and Where to Use Robotic Process Automation in Finance and Accounting](#) and [Tips for When to Use RPA in Sourcing and Procurement](#).

Step 2: Shortlist the Most Suitable Vendors

Application leaders evaluating RPA vendors should understand the broad RPA market and the disparate range of offerings and value propositions of these vendors (see [Magic Quadrant for Robotic Process Automation](#)). It is important to note that no one vendor delivers all capabilities equally well across the breadth of the typical organization's functional, technical and operational requirements.

Application leaders want to see RPA implemented broadly across their enterprise. This requires a coordinated exercise with careful selection criteria (see [How to Choose Your Best-Fit Vendor for RPA Software Platforms](#)).

In the majority of cases, application leaders will need to make choices between features and functionalities that are excellent and others that are “good enough,” depending on their priorities. Gartner views the following as essential for successful RPA programs:

- Automation development capabilities
- Integration features
- Control panel/dashboard
- Enterprise IT software development life cycle capabilities
- Hosting and cloud capabilities
- Security, compliance and governance capabilities
- Artificial intelligence, machine learning and natural language processing capabilities
- Optical character recognition (OCR), process discovery and intelligent document processing (IDP).

Application leaders can use this list to assess vendors’ offerings (and consult [Critical Capabilities for Robotic Process Automation](#) for guidance on how vendors satisfy different use cases and provide associated Critical Capabilities). In this way, application leaders can be proactive, rather than just react to vendors’ positioning of the scenarios most favorable to their solutions.

The capabilities and features listed above should be given priority, according to specific requirements and needs. For example:

- Prioritize low-code/no-code capabilities for automation development if planning to begin RPA with citizen developers.
- Prioritize cloud hosting capabilities if looking to have different deployment options (on-premises and cloud-based).
- Prioritize OCR and IDP capabilities if use cases involve semistructured or unstructured document reading.

Gartner also provides a detailed questionnaire and vendor evaluation framework for RPA: [Toolkit: RFP Template for RPA](#).

Step 3: Test-Drive Shortlisted Vendors’ Products

Application leaders should test the promises made by their shortlisted RPA vendors by running a POC for less complex but high-value use cases. They should create a focused agenda and a list of desired outcomes to ensure the POC addresses their organization's objectives. More specifically, they should:

- Run a POC for predominantly high-value, short-development, low-complexity use cases.
- Write a detailed script that includes a focused agenda and a list of desired outcomes to ensure the POC addresses their organization's objectives. This script, which will form the basis for consistent scoring and like-with-like comparison, should be shared with the vendors.
- Guide the vendors and be involved in the POC process, but also give them the freedom to personalize it to suit your requirements and desired business outcomes.
- Include in the script a clear outline of each use case and functionality that must be demonstrated (generally organized by functional area).
- Test use cases by including organization-specific data in one or more POC demonstrations. Send the relevant data at least two weeks prior to the real POC's date to ensure the vendor has adequate time to prepare.
- Invite stakeholders from each key business area to review the POC. At minimum, this review should cover the business overview portions of the POC. This will enable them to understand how the new RPA technology will work and benefit the organization.

The evaluation team should ensure that all test drivers provide feedback in a standard scoring format that is included with the scenarios, to ensure consistency of evaluation.

Evaluation team leaders should encourage all those participating in these sessions to continue to ask questions if the initial response from the vendor seems incomplete or opaque.

Evidence

The main sources of evidence for this document are more than 5,000 RPA-related interactions that Gartner has had with clients over the past two years.

Recommended by the Authors

[Executive Summary Video: Getting Started With RPA](#)

[Magic Quadrant for Robotic Process Automation](#)

[Critical Capabilities for Robotic Process Automation](#)

[How to Choose Your Best-Fit Vendor for RPA Software Platforms](#)

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U.S.: 1 800 213 4848

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