



Setting up an Automation Program

Agenda

- What is an automation program?
- Setting up a program - key pillars
 - Governance
 - Staffing
 - Platform evaluation
 - Operating model
- Lesson learned

Today's goals:

- Define the key pillars for setting up an automation program
- Remind members of the Tarpon templates that exist to support your program

What is an automation program?

The automation program refers to the people, software, and processes that are involved in implementing and managing an organization's automations.

Common responsibilities:

- Automation planning
- Resource planning
- Automation lifecycle management (i.e. identification → maintenance)
- Training and education
- Stakeholder management

Discussion:

- What types of technologies are included in your automation program (RPA, API, ML, etc.)?
- Does your organization have interest in expanding your automation program outside of Revenue Cycle?

Setting up a program



Governance: Establish a framework and guidelines for overseeing the automation program



Staffing

Identify hiring needs to manage the automation team



Platform

Evaluate and select an automation vendor



Operating Model

Incorporate the automation lifecycle into operations

Governance

The automation governance team is critical to *managing* and *growing* your automation program

What should our governance team consider?	
Focus Area	Details
Program background and scope	Summarize the automation program, technology, and scope. Putting on paper the what the program does and its area of focus will help guide the team..
Mission and goals	Agree upon a concise explanation of the automation program's reason for existence/purpose along with short term and long term goals for the program
KPIs	Determine the organizational KPIs that will be associated with the automation program to measure success (e.g. labor expense, cost to collect, etc.)
Members and roles	Define the names, titles, and roles for governance committee members. There will be dedicated automation team members and supporting members who need to be consulted/informed.
Meeting cadence and attendees	Document the administrative details related to committee meeting cadence, facilitator, topics, and logistics
Team operations	Set expectations regarding participation and level of commitment. Determine how decisions are made (ie group vote, leadership sign-off, etc.)
Resources	Identify resources to support the automation program such as dashboards, templates, project plans, etc.

Tip: start with the Team Charter and work backwards.

Focusing on the key elements of the charter will lead to a structured and defined automation program.

Staffing

Dedicated roles (i.e. the Automation Team)

- Developer
- Solution Architect
- RPA Project Manager

Supporting roles

- Executive sponsor
- Business Process Owners
- Report Writer
- Consulted/Informed: EMR SME, IT Liaison, Compliance, Finance, Process Improvement



Cost considerations

- Platform cost
- Infrastructure cost (if on-premise)
- Staffing
 - Dedicated resources
 - % of time spent from support resources

We recommend including your dedicated and supporting roles in the governance committee

Platform evaluation

Define the core functionality and organizational priorities for your desired platform.

Utilize a questionnaire to document key questions and review responses as a committee.

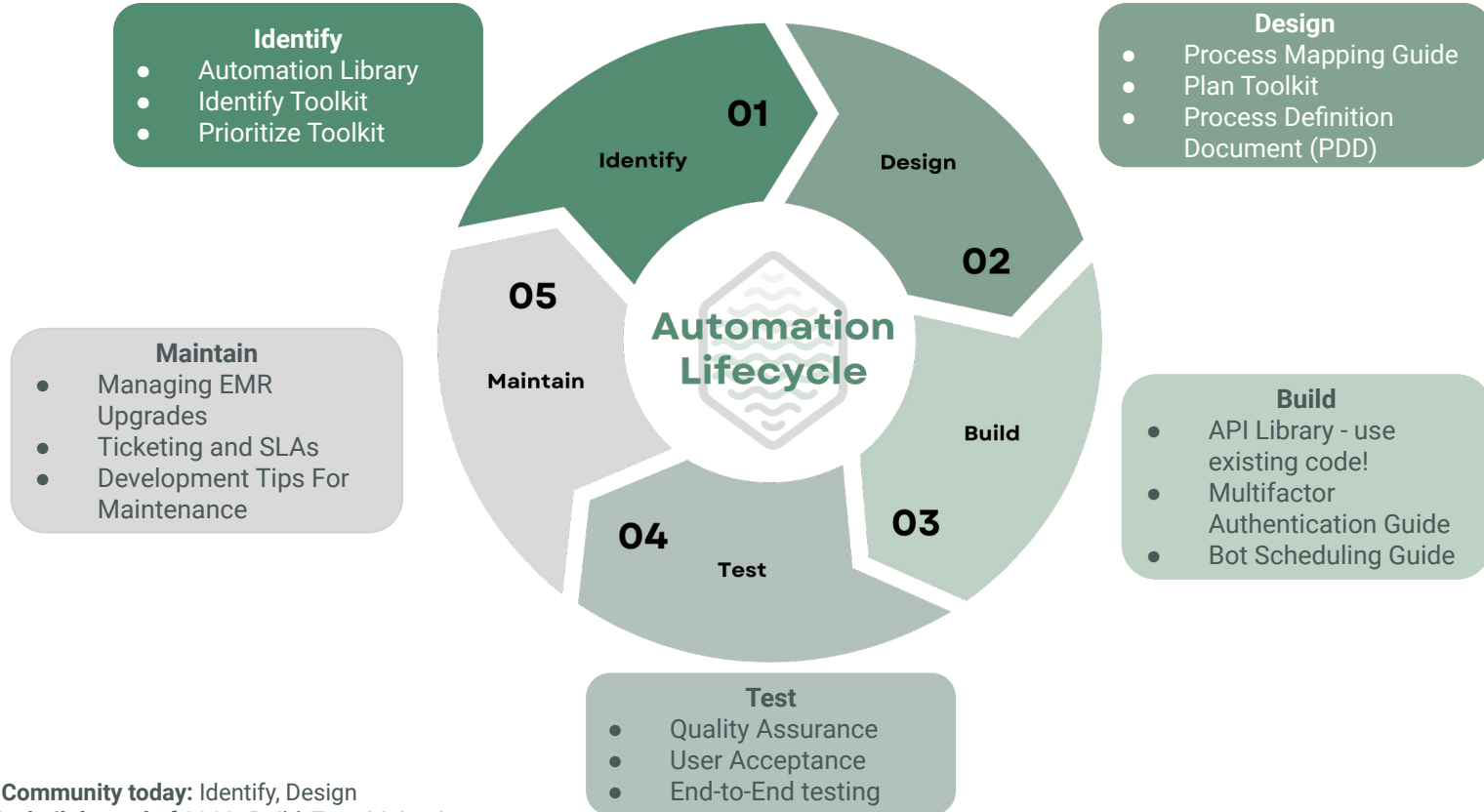
Topics:

- Pricing and license details
- Development functionality and capabilities
- Data management
- Security
- Support

Discussion: Managing more than one automation platform

Tarpon Health Automation Platform Selection Process	
Platform Questionnaire	
Intent: This document is to be used as a questionnaire while determining which RPA platform best suits your organizations needs. Each RPA platform has its own strengths and weaknesses, and the best one for a particular organization depends on their specific needs and requirements. It is important to evaluate the features, pricing, and support offered by each platform to determine which one is the best fit for the organization. Directions: 1. Use this document as a tool to log responses from the automation platform. Once responses are received, rate and rank which ones are most important to your organizations needs.	
Pricing & License Details	Response
How is pricing structured? Per developer? Per Automation? Per License?	
Is there a Community/Free version available?	
Is there a trial of the paid version available?	
Products included in package? What products are additional cost?	
additional question space	
General	Response
Application or web based?	
Cloud & On Premise offering available?	
Supportive of multiple platforms? Any exclusions? (microsoft apps, web, mobile, Citrix, VDI, etc)	
Scalability within organization?	
Front end or back end capability?	
Market Share/Industry leading?	
Security & encryption?	
Training & Certifications available?	
Product support/ticketing system provided?	
additional question space	
Development	Response
Prerequisites? Ease of use for developer?	
Citizen development/Low code offering?	
Visual or script based?	

Automation Lifecycle supporting documents



Resources on Community today: Identify, Design
Resources to be built by end of 2023: Build, Test, Maintain

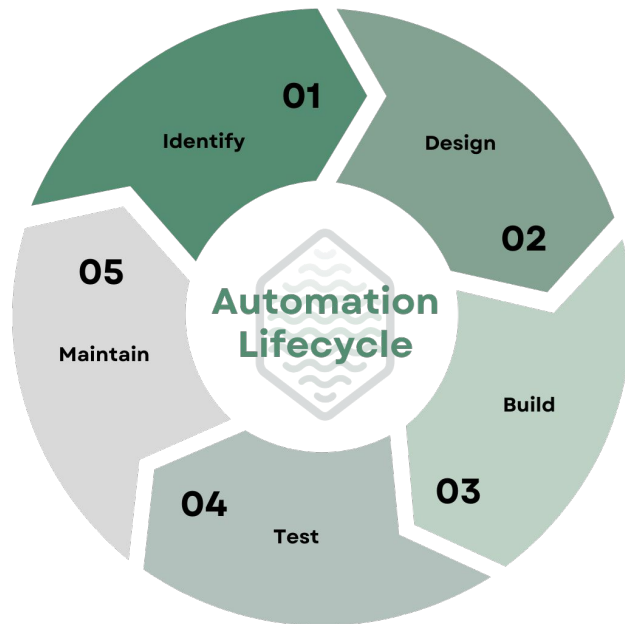
Operating model: processes to consider

Automation specific processes should be incorporated into your operations in order to effectively manage and support your program.

Examples include:

- Use case idea Intake:
 - Service now
 - Web based form (Smartsheets, Google, etc.)
 - Dedicated email
- Development planning, tracking, and communication
 - Jira boards
 - Smartsheets
 - Azure DevOps
- Establish maintenance standards and build all bots on agreed upon framework
- Identify service request/ticket process
- Incorporate automation team representation into upgrade and downtime review process

Don't forget to educate staff on the implemented operating model!



Discussion: what implemented processes have been most successful for managing your automation program?

Lessons learned

- Build a scalable and adaptable Automation Program with the right team and roles
- Get your staff to participate in automation identification through education and incentives
- Continue to involve stakeholders and experts along the way
- Understand that it takes time
 - Spend time planning and validating use cases so you are automating activities with a positive ROI
 - Errors can erode confidence so spending extra time on quality assurance is a good thing
- RPA is fragile so document thoroughly to assist with maintenance
- Reduce downtime with a thorough maintenance structure
- Don't let change management and training be an afterthought
- Community allows you to validate ideas and minimize wasted time and effort
- Reflect on lessons learned and document action plans when necessary
- Celebrate successes!

Tell us how we did



1 - Least valuable

10 - Most valuable

We value your feedback!



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