

“Robotic Process Automation case study”

Vince Gratrack, IT Director, Mencap and Jeff Howarth, Lead Robotics Developer, Royal Bank of Canada

As the fifth-biggest employer in the charity sector, Mencap boasts nearly 9,000 staff, a fifth of whom leave, join or change roles every year. This is a huge administrative burden for the charity’s HR team in Peterborough, as every change has to be inputted to three different legacy IT systems.

The charity’s IT director Vince Gratrack was bemoaning this inefficiency to a friend over coffee at the start of this year when the friend mentioned that his employer, the Royal Bank of Canada, had had some similar administrative challenges but had solved them through the use of robots – or, to give it its proper name, Robotic Process Automation. RPA is essentially a piece of software that replicates human actions carried out on a desktop computer. Gratrack wangled an introduction to Jeff Howarth, lead robotics developer at RBC Capital Markets in London, and persuaded him that helping Mencap address this problem would fit neatly within RBC’s corporate social responsibility programme.

At the start of the partnership, Mencap identified 48 separate processes across its various functions that swallowed up huge amounts of employee time. These involved 11,000 tasks which took up 952 hours each month – the equivalent of at least six full-time employees.

“It doesn’t matter if you are in financial services, healthcare, HR, charities, customer service, accounting – you will have loads of processes that are carried out, often between different systems, and these will all be opportunities where you can use robotics,” said Gratrack.

Gratrack insists that the outcome he wanted from deploying RPA was not to streamline processes so that the charity could reduce headcount – he merely wanted to free up staff time so people could work on more valuable and interesting tasks. “We wanted to take the robot out of the human,” he said. “So much of people’s work is not exciting, it’s boring, and it destroys morale. We don’t want to take the employees away, we want to take away that mundane activity that they do every day.”

Once he realised that CSR is ingrained in the culture at RBC, so much so that it is part of employees’ career development and progression, he asked Howarth if he would build Mencap a robot as part of the bank’s skills-based volunteering programme. RBC agreed to the partnership.

Howarth explained: “RPA is not AI, it’s not machine learning, it’s not trying to figure anything out for itself. It’s just repeating a set of tasks. It’s packaged as a piece of computer software and it has a low barrier to entry technology-wise.”

He provided advice to Mencap on choosing the processes that would benefit most from automation, selecting the software vendor and devising a proof of concept that was used to take the proposal to Mencap’s senior team. Howarth also provided tailored training to Mencap’s in-house developer to ensure the sustainability of the programme.

RPAs bring many benefits: they can process data much faster than a person can and can run 24 hours a day. The accuracy of the inputted data improves as the potential for human error is removed, and staff turnover starts to reduce because people’s jobs aren’t so boring.

There were challenges too, not least contract hurdles and managing the risks of giving Howarth access to the charity's HR system, with its highly sensitive data. Howarth also cited the difficulty in sticking to a timeline and limiting scope creep. Gratrack found that he had to spend a lot of time convincing people in Mencap that he wasn't trying to kill off people's jobs. But they were both very proud that they had managed to progress from a serendipitous conversation to going live with a fully-formed RPA in less than a year.

The first RPA automates the process on the HR system, and now Gratrack and Howarth are devising plans for a new phase of development that will enable the HR system to interact automatically with the other two systems. And there are plenty more processes at Mencap that they could apply an RPA to, they said.

"There's no shortage of low-hanging fruit," said Gratrack. "We really can save millions out of this."