

# The Modern Guide to Scale RPA Process Discovery

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*Collect, document and validate automation ideas at scale with the Conversational Process Discovery Framework.*



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# WHO SAYS PROCESS DISCOVERY CAN'T BE DONE REMOTELY - AND AUTOMATED?

*In a post-Covid world, a lot of teams are required to do more with the same or even less resources, and do all of it remotely.*

Strain on staff and bottlenecks in workflow are now exponential and far more visible than before. Freeing up resources and streamlining processes by shifting tasks to RPA solutions is a no-brainer.

But how do you find the time to prioritize what those tasks should be and avoid negative ROI on the entire endeavor? How do you collect and analyse hundreds of automation ideas without hiring several new analysts? With this Conversational Process Discovery Framework.

Data without analysis isn't worth much. Process mining is an important part of any RPA implementation journey, but this approach on its own falls flat. And the data it does provide is incomplete. Process mining leaves important parts of your business's story untold and might lead to subpar implementation due to lack of information. And in the midst of the current crisis, it could encourage rushed implementation, as you're trying to automate more quickly than you might've in a normal business climate. In the end, you're missing good ideas for automation and could be wasting time and money.

## One of the leading causes why RPA initiatives fail?

Poor process assessment before implementation. The last thing you want is to discover, after the work has been done, that you've selected the wrong process to automate.

When you incorporate the Conversational Process Discovery Framework, utilizing qualitative automation technology like Nika's discovery chatbots, you allow RPA's full potential for your enterprise to be revealed.

You'll be able to automate — and scale — with a clear vision, no matter how many of your staff are working from home.

To keep getting the automation results you need as your brand grows or worldwide context changes, the Conversational Process Discovery Framework is a must.

## Working together, remotely, is the new normal

Let's go back to your team that's overburdened thanks to sudden, sweeping changes triggered by the pandemic. Everyone's been abruptly switched to working from home with fewer resources, larger workloads, and a host of heavy non-work loads they now must carry. Morale has declined, right along with productivity.

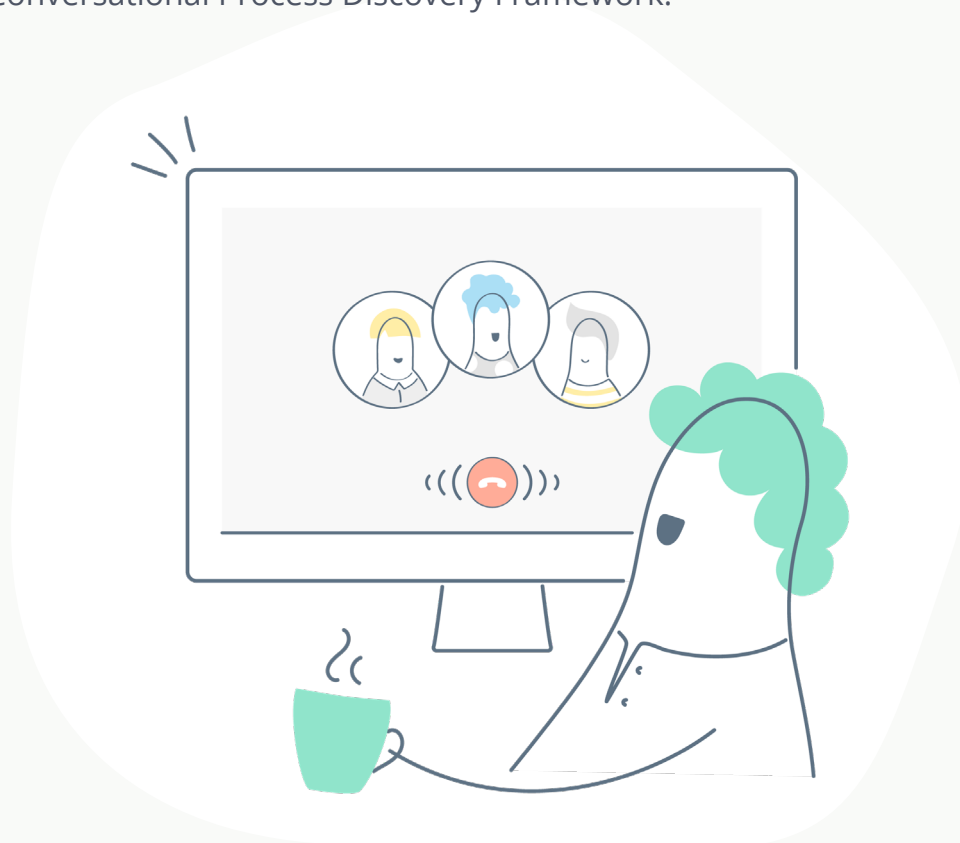
The best thing you can do for your team — ergo, your business — is free them up from repetitive tasks, by successfully implementing RPA, so they can focus on the work they find rewarding.

That's why it's crucial to have a framework that finds and prioritizes automation ideas based on not only your company's KPIs but also your team's pain points. Job satisfaction will increase, right along with productivity.

Now think about the department whose job it is to execute the RPA initiative. That team is living through the same pandemic — they're overwhelmed, too. Now they're under pressure to automate as quickly as possible; there's no time to wait around for employees to reveal ideal areas for automation.

Relying on passive process mining alone to manage the project is only compounding the problem. Even if you bring in external process consultants, that traditional way of working may serve only to interrupt the flow of communication.

This is obviously not going to work. And that's where automated process discovery chatbots—the next-gen way to tackle the problem—come in to support the whole operation, as part of the complete Conversational Process Discovery Framework.



## OLD WAY

### Passive Process Discovery

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- ✗ Does not scale
- ✗ Difficult to transition to remote work
- ✗ Expensive to operate
- ✗ Complicated and delayed by involvement of external consultants/analysts
- ✗ RPA team is overwhelmed and experiences low morale
- ✗ RPA team is able to understand, prioritize, and implement only a limited amount and therefore automates low-value tasks, ending in negative ROI

## NEW WAY

### Active Process Discovery

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- ✓ Scalable and automated
- ✓ Remote-ready
- ✓ Low-cost operation
- ✓ Streamlined, no need to rely on external consultants/analysts
- ✓ Frees up RPA team to focus on high-value process investigation
- ✓ RPA team can map out and focus on high-value processes with positive ROI and clearly identify next steps

## WHAT EXACTLY IS THE CONVERSATIONAL PROCESS DISCOVERY FRAMEWORK?

### Introducing the Conversational Process Discovery Framework

The Conversational Process Discovery Framework is targeted to your business needs, scalable, and works well fully remotely.

The Framework involves a mixture of people and software working together to create the ideal roadmap to a successful automation initiative. Both humans and bots contribute their strengths to the entire implementation. It's a cooperative, efficient partnership that drives results using a layered approach—you might recognize it from industries like customer service and sales—to get everyone where they want to go with as few detours as possible.

Using the Conversational Process Discovery Framework allows you to regain control of your entire process discovery journey, with everything organized in one place. This all-in-one tool, where the RPA initiatives are aligned, allows frictionless interaction between stakeholders and enables your RPA team to perform better, with more structure, even while working from home.

With the Framework, the team will be able to

- Proactively capture process details from specific departments and valuable business expertise from Subject Matter Experts (SMEs)
- Empower employees to submit automation ideas and workflow roadblocks on their own
- Free up analysts to step in only for the most critical or complex process owners

**Conversational Process Discovery Framework.**  
**The most effective way to manage process discovery at scale, remotely.**

## What are the 3 layers of discovery?

### PASSIVE MINING TOOLS

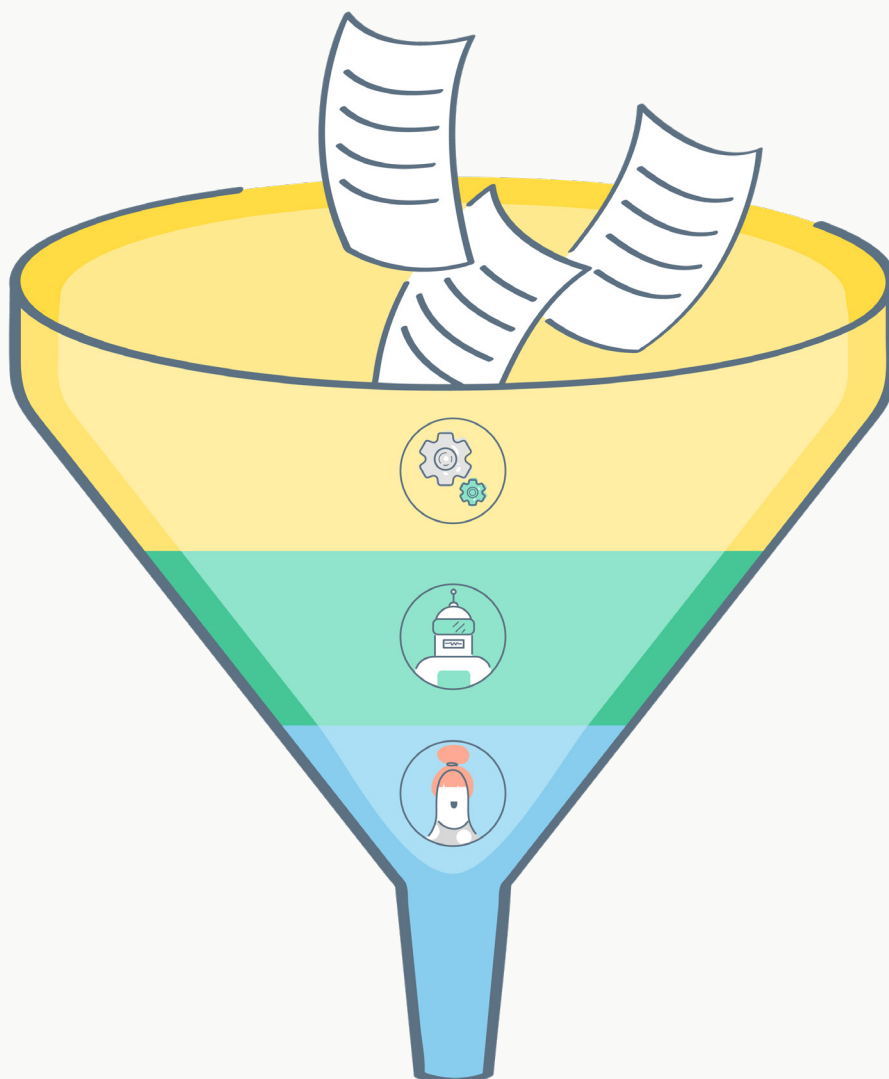
Get a high-level view of your tasks with process/task mining software.

### MESSENGER-LED DISCOVERY

Dial in with Nika's proactive discovery chatbots that integrate with your existing business messenger.

### HUMAN-LED DISCOVERY

Sort through complex processes through one on-one conversations where business experts interact with bots to bridge any remaining gaps.



# Choosing the right layer at the right time

What’s particularly great about the Conversational Process Discovery Framework is that its layered approach means it can be taken apart to fit your needs.

When you’re using a cooperative discovery tool like Nika, passive mining tools aren’t necessary — you could skip the first layer, saving both time and money.

That being said, if you’d like to get a holistic view of your processes, identify bottlenecks at a high level, or generate process maps, passive mining tools are a good first step.

Here’s a quick overview of how each layer helps your RPA team achieve the end goal:

Passive Mining Tools*	Messenger-Led Discovery	Human-Led Deep Dives
<ul style="list-style-type: none"><li>• Get a holistic view of your processes</li><li>• Identify bottlenecks at a high level</li><li>• Generate process maps</li></ul>	<ul style="list-style-type: none"><li>• Boost morale with a people-bot partnership</li><li>• Capture and document process details from staff who actually perform those tasks</li><li>• Empower team to submit ideas and challenges</li></ul>	<ul style="list-style-type: none"><li>• Hold remote one-on-one conversations</li><li>• Save resources for the most complex processes</li><li>• Get high-value analysis of each workflow</li></ul>

\* (OPTIONAL with tech like Nika)

## The Messenger-Led Discovery experience

Great process discovery results don’t always have to involve interaction with another human. Nika offers a proactive, cooperative, and automated discovery solution through chatbots that make gathering information easy and kind of fun!

Nika can capture and document specific process details by bringing your employees’ perspective and knowledge to process discovery. This is done in two ways: the top-down or proactive approach and the bottom-up or crowdsourcing approach.

To be proactive, simply activate the Nika messenger bot within your existing business messenger (Slack, MS Teams, etc.) to interview staff working on special projects or in different departments. You can target specific SMEs, and then Nika will guide them step by step to gather all the information you need—including things like screen recordings—and input it into a process document.



To crowdsource, all you have to do is empower SMEs and other team members to submit their own automation ideas and challenges to Nika anytime when they're working on a project or something comes to mind. This sort of involvement in an RPA initiative works wonders for morale and makes staff feel invested. Once your automation initiative is implemented, you'll have a much higher chance of adoption success.

## **The Human-Led Deep Dives experience**

Are robots replacing my team? Definitely not.

Even the best chatbot can't deconstruct complex situations, processes, or issues. Nor can it help in a personal sense when an employee is frustrated or angry. There will always be complicated workflows that need to be handled by your analysts.

But Nika can still contribute—and it can do this remotely, allowing distributed teams to work efficiently together from anywhere, even in widely varying time zones. Before you send an RPA specialist to the SME involved, you can use Nika to communicate directly via your messenger app to capture process details ahead of the one-on-one meeting, virtual or otherwise. And during the meeting, Nika's got your back, too, thanks to features like screen recording and ongoing documentation.

By utilizing this smart messenger technology to help address the most complex issues, you'll be able to save your best resources (your RPA specialists) for the more high-value work of sorting through things with other team members and really diving in to problem-solve. Without Nika, your analysts would be spending far too much time on the information-collecting part of the process discovery journey.

## HOW DO I APPLY THE FRAMEWORK TO MY BUSINESS?

*All 3 layers together will form the best framework, but there's actually no need to use the passive mining layer if you're not already using these sorts of tools—Nika is simpler and easier to use, and you'll get better results faster.*

With Nika's messenger-led layer, you'll get new automation ideas from day one!

Of course, if you do already have process or task mining in place, you can combine those initiatives with Nika for a more complete view of your RPA potential.

Here's an example of how you can combine people and bots with the Conversational Process Discovery Framework to achieve the ideal outcome:

**If you already use process and task mining, follow these 3 steps to optimize your process discovery with Nika...**

### Step 1

Use your existing mining tools to get a high-level overview of your end-to-end processes. Where the real manual work of analyzing the data normally begins, don't sweat it. Nika can dive deeper—from anywhere in the world—into the workflows to understand the process in detail and get all info and documentation of the processes in order to evaluate them for automation readiness and impact. That's what comes next.

### Step 2

Move on to the messenger-led approach to analyze the data you gathered in Step 1. With modern process discovery tools like Nika, you can do this easily and remotely. Your RPA team can deploy chatbots via Slack, Teams, or another business communication app you're already using to get more information on mining data and to empower your staff to share their thoughts on their own at any time. With online chat, you can get up to 10x more submissions versus in-person communication or cumbersome submission processes.

The bots do the interviews and capture process details, including screenshots and video recordings. Nika intelligently asks the right questions to not only fill your automation pipeline with options but also analyze and prioritize those ideas in one organized location. This frees up your analysts for more high-value work in the next step.

### Step 3

Nika helps to track and manage the process discovery pipeline, while keeping employees informed by sending regular updates about their idea submissions. But, in the end, Nika is not human so this is where your RPA specialists and team members in various departments come in.

Your analysts can prepare to tackle the most complex processes and roadblocks with Nika by having bots chat with SMEs ahead of their one-on-one meeting. And during that meeting, whether it's happening remotely or in person, Nika will handle screen recording and other documentation, so attendants can focus on the conversation.

Any remaining issues or gaps in information from previous steps are covered by business experts here.

## **If you do not already use process and task mining, you actually only need to follow 2 steps!**

*One of the best things about Nika is that you can bypass the separate procedure of task/process mining, because Nika helps you cover all bases.*

### Step 1

Use a messenger-first approach to automatically collect, assess, and document the best automation ideas from employees. With modern process discovery tools like Nika, you can do this easily and remotely.

Your RPA team can deploy chatbots via Slack, Teams, or another business communication app you're already using to hunt for the best ideas from your staff. Nika intelligently asks the right questions to not only fill your automation pipeline with new ideas but also analyze and prioritize those based on automation-readiness and impact. Nika's bots do the interviews and capture process details, including screenshots and video recordings. There's no need for process mining tools, and everything stays easily organized in one place.

What's more, your team will be empowered to submit their own ideas or challenges to Nika via chat anytime, from anywhere—it's incredibly easy when they're already messaging with other employees on the platform anyway. With online chat, you can get up to 10x more submissions versus in-person communication or cumbersome submission processes.

All of this frees up your analysts for the more high-value work in the next step.

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## Scale your process discovery with Nika

You can achieve everything in this guide with Nika.

Learn all about Nika, Cloudstorm's process discovery solution and how to get started:

<https://www.nikarpa.com/conversational-process-discovery>

Or book a demo with us [here](#)