

Gartner Peer Insights ‘Lessons Learned’: Implementing Robotic Process Automation Software

PEERS Published 31 January 2022 - ID G00764445 - 9 min read

By Analyst(s): Peer Contributors

Initiatives: [Finance Technology Optimization](#); [Software Engineering Technologies](#)

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RPA platforms automate repetitive, rule-based, predictable tasks by using a combination of UI interactions and APIs to integrate different enterprise applications (such as ERP). Software engineering leaders can learn from the implementation experience of their peers shared on Gartner Peer Insights.

Overview

Gartner Peer Insights is a free peer review and ratings platform designed for enterprise software and services decision makers. Reviews go through a strict validation and moderation process to ensure they are authentic.

We analyzed 211 Peer Insights reviews to identify lessons learned implementing robotic process automation (RPA) software. This report focuses on the responses to the questions: “If you could start over, what would your organization do differently?” and “What one piece of advice would you give other prospective customers?” To browse all reviews, see [the full list of Robotic Process Automation Software reviews on Peer Insights](#).

Peer Lessons Learned

This edition of “Lessons Learned” summarizes clients’ firsthand experiences with implementing RPA software. The peer advice results both from successful implementation projects and learnings based on what went wrong. This peer perspective, along with the individual detailed reviews, is complementary to expert research and provides a holistic view to the implementation process. The top themes in this peer advice are summarized below (see Figure 1).

Figure 1. Gartner Peer Insights ‘Lessons Learned’: Implementing Robotic Process Automation Software



n = 211
Source: Reviews submitted to Gartner Peer Insights between January 2021 and January 2022
ID: 764445

Below are some key lessons learned and most cited recommendations by Peer Insights reviewers to help software engineering leaders in the implementation of RPA software.

Lesson 1: Evaluate Your Immediate and Future RPA Needs, and Business Drivers That Help Scale Your Plans

The peers recommend software engineering leaders to gauge clarity about the scope of their business and at what level can automation support their business processes. Begin your requirements-gathering process keeping in mind your near- and future-term plans. Align your business outcomes with your automation journey for quick wins.

Peer recommendations include:

- Evaluate your needs first and start small with impactful use cases. Later, you can move to add new tools if required or integrate machine learning (ML) tools for better outcomes.

- Assess your business drivers and the success directors will support you in how to get there.
- Prepare for both technology resources and willingness from all staff, as RPA can make a significant change to your businesses.
- Set a big target at the beginning. For example, apply for more processes to save time later.
- Evaluate your own plans with a minimum three years' perspective to see which provider has plans aligned to your needs, rather than just evaluating the existing value proposition.

Representative quotes from peer reviews:

A peer highlights the importance of prioritization in one's automation journey:

Any enterprise that wants to implement RPA should have a clear mindset about how automation can support them in their current business, the importance of it in daily operation and the priority when implementing within the scope of business. If you make your requirement clear from the beginning, you will know exactly what to do with the delivery team and make it work step by step.

— Business Professional, Service Sector

Another peer adds:

Well, every organization knows what its needs are and it varies from company to company. They know what kind of service/tool will suit their business requirement and should make their decision based on all the factors involved.

– *Infrastructure and Operations Professional, Service Sector*

A peer recommends understanding your long-term vision:

Start with the end in mind – why do you want to get into RPA and what is your long-term vision and value proposition? The technology is very easy to learn and get quick wins, but it's very difficult to have the right governance in place, know when and how you'll find the right processes to automate, and how are you going to align that effort to a strategic business objective.

– *Technical Professional, Manufacturing Sector*

Recommended reading:

[Quick Answer: How to Choose the Right Use Cases for Robotic Process Automation](#)

Lesson 2: Prioritize Vendors That Align With Your Business Outcomes; Select a Less Complex Yet Effective Tool

Upon identification and consolidation of your business needs, peers advise software engineering leaders to narrow down suitable vendor options around those requirements. Ensure that the chosen vendor aligns well with your needs. Peers advise the leaders to be cognizant of making a selection that helps minimize the effort of their resources. It is better to select a simple yet effective tool that does not just cover a part of digital transformation efforts, say peers.

Peer recommendations include:

- Select a simple solution that is easy to handle. For example, a low code solution is always better to deploy and utilize, which will also minimize the dependency on your resources.
- Take the overall cost factor in consideration. Select vendors that have a strong and more in-depth/broad solution set and integrations.
- Integrate different analysis tools with the RPA software and start a more intelligent automation journey at once. It is more difficult to find suitable AI solutions and adapt those to the existing ones.
- Verify various approaches as there are times one should have hybrid tools, which can automate everything and can be run anywhere.
- Evaluate total cost of ownership (TCO) of automation, and quantify accuracy, agility and speed, in addition to efficiency gains from automation.

Representative quotes from peer reviews:

Prefer a commonly used solution, says a peer:

While open source products are very useful, beware of your data security and compliance needs and also long-term sustainability. Choose a vendor that is widely used and online resources are easily available and accessible.

— Data and Analytics Professional, Retail Sector

Another peer says:

I am a nontech user, so I do not have a clear idea of what a bot can do for my scope of work. My brief for the vendor was not detailed enough for them to understand. I think I would have a better and deeper brief for my wishing bots.

— *Program and Portfolio Management Professional, Finance Sector*

A peer suggests:

Look for a vendor that provides end-to-end digital transformation, rather than the ones that provide only one part such as RPA or workflow to have better business outcomes.

— *Enterprise Architecture and Technology Innovation, Finance Sector*

Recommended reading:

[Critical Capabilities for Robotic Process Automation](#)

Lesson 3: Standardize and Automate Redundant Processes, and Then Proceed With RPA Initiatives

The peers direct software engineering leaders to standardize their processes before proceeding to RPA initiatives. In addition, follow best practices to automate the process so that you can employ your workforce for critical work that the organization does, say the peers.

Peer recommendations include:

- Design the software design document, and then go for bot creation, deployment and maintenance.

- Organize and optimize the processes to be automated, so that the RPA software would be used not only to automate a process, but also to perform the best version of the process for exponential gain.
- Focus on process standardization and also your RPA initiatives. If ROI is required from a use case, proceed with a clean, stable and repetitive process.
- Start with the small processes first and do not go for the big ROI payoff in the first go.
- Follow best practices before starting any process automation and ensure that the process makes use of the automation to the best of its ability.

Representative quotes from peer reviews:

A peer adds:

Do not expect overnight changes with automation. Your process should be standardized – the more standard your process is, the less painful it is during the implementation. Then after the project is done, your process also needs to be refreshed to adapt with the bot, otherwise the bot would not be utilized as much as they are designed to be.

– Application Professional, Retail Sector

Refine the existing processes for better automation, says a peer:

We would refine our existing processes first. There are processes that are poorly designed and consuming so much of human resources in running the system. Of course we can get positive results through automation anyway, however doing it cleverly and efficiently is another thing.

– *Enterprise Architecture and Technology Innovation Professional, Finance Sector*

Another peer suggests:

Gather ideas or a list of time-consuming monotonous tasks from people working across different departments and try to automate such processes. This way, we can utilize the workforce for some other valuable work that the organization does.

– *Analyst, Service Sector*

Recommended reading:

[How to Use Robotic Process Automation to Improve the Customer Experience](#)

Lesson 4: Invest in the Right Training Programs to Build RPA Skills

Peers insist on developing RPA skills by investing in proper training. Get your team involved and opt for a structured capability development. Peers also indicate that while RPA is not a complex technology, it does require regular knowledge exchange within your focus groups across the organization.

Peer recommendations include:

- Invest in a graduate program to build RPA skills. Build the infrastructure so it is scalable, and take your cybersecurity, risk and IT staff on the journey from the very beginning.
- Meet the user community, and ask the questions that will make the most sense and work backward from there.
- Perform as much training as possible and consider contacting different developers to make it easy to create automation solutions, in addition to relying on the product's support team.

Representative quotes from peer reviews:

A peer says:

RPA is not a complex technology, but is not something that can be understood immediately. It would be better for your team to spend time on learning, get the full team's involvement, and quick update to ensure the RPA implementation process is on time.

– Enterprise Architecture and Technology Innovation Professional, Finance Sector

Create focus groups for faster learning process, suggests a peer:

Prepare for a dedicated team or assign a person from each team to learn about the product. Create focus groups to meet regularly and share with each other the development experience. In our company we have such regular meetings and find that the exchange is fruitful.

– Analyst, Retail Sector

Another peer adds:

We started the RPA journey focusing on the quick wins and with a team who did not have much experience in software development. This is when we had to learn our way into the product and RPA via online forums and trial and error. It took us a considerable time to recover the investment and gain traction. If we could start over, we would get skilled software developers and get them trained in the selected tool via all the learning materials that are available online and the courses and certifications in RPA.

— *Technical Professional, Manufacturing Sector*

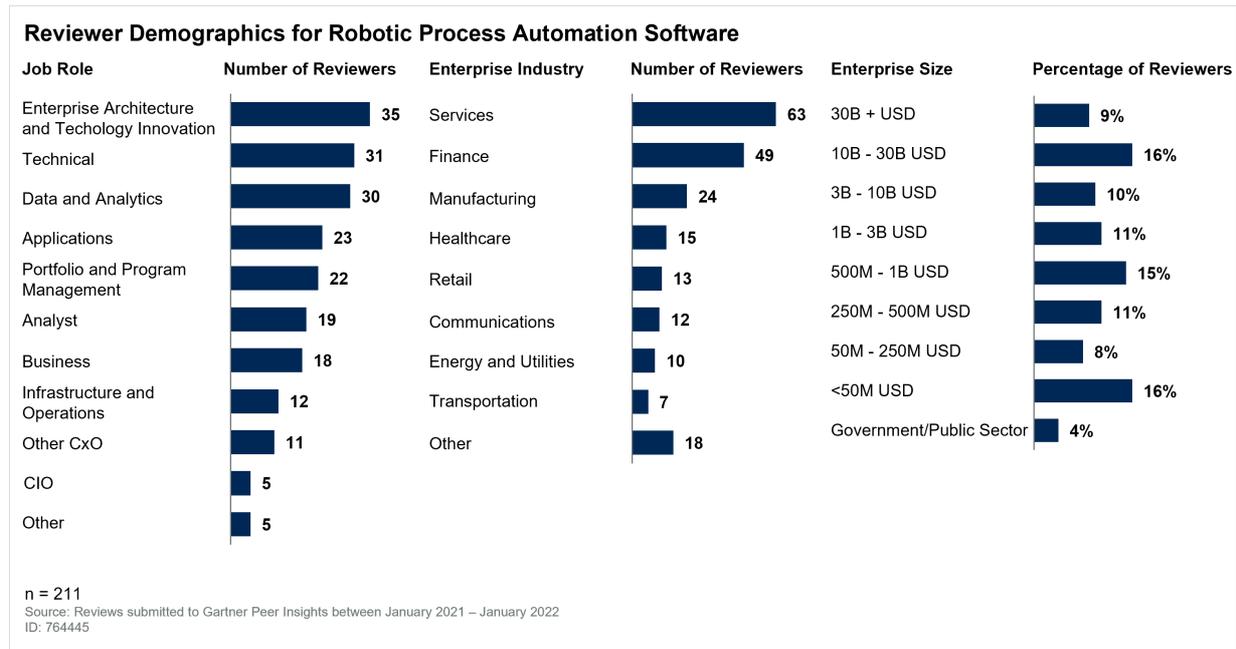
Recommended reading:

[Considerations for Implementing Robotic Process Automation](#)

Reviewer Demographics

Reviewers who submitted their lessons learned represent a cross-section of job roles, enterprise industries, and enterprise sizes (see Figure 2).

Figure 2. Reviewer Demographics



Methodology

Of the Peer Insights survey data considered for this market, only those responses meeting the following criteria were included in this synthesis:

- Reviews less than 12 months old.
- Responses that pertain to the project experience and are not tied to the capabilities of a vendor.
- Reviews were clustered into the top-four most-referenced categories (lessons learned) and then listed in order of relevant phases in the project life cycle.

The results of this synthesis are representative of the respondent base and not necessarily the market as a whole.

“The data used in this report is drawn from reviews on Peer Insights, a crowdsourced enterprise review platform that relies on dynamic data. Key to maintaining the integrity of the site is our ongoing moderation and validation of those reviews. Reviews are examined before publishing to the site and periodically, post-publishing. Due to the dynamic nature of the data, the external Peer Insights site will always have the most updated view of the data in this report.”

Document Revision History

Gartner Peer Insights 'Lessons Learned': Implementing Robotic Process Automation Software - 6 April 2020

Peer Lessons Learned: Implementing Robotic Process Automation - 7 March 2019

Recommended by the Author

Some documents may not be available as part of your current Gartner subscription.

[Magic Quadrant for Robotic Process Automation](#)

[How to Use Robotic Process Automation to Improve the Customer Experience](#)

[Gartner Peer Connect Perspectives: Implementation of Robotic Process Automation](#)

[Build Leverage to Effectively Negotiate Pricing on RPA Software and SaaS Deals](#)

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