



Engineering Organisations for a Dynamic & Digital Future

# RPA PROCESS HEATMAP GUIDELINES



# END-TO-END HIRE TO RETIRE PROCESS



## 1.0 Create HR Strategy and Process

1.1 Develop HR, strategy, processes, and policies

1.2 Identify staffing needs

1.3 Develop hiring plan

1.4 Manage hiring plans

## 2.0 Recruit and Onboard Employees

2.1 Create and post job descriptions

2.2 Source candidates

2.3 Screen candidates

2.4 Select Candidates

2.5 Manage pre-employment verification

2.6 Develop and extend offer

2.7 Onboard new hires

2.8 Set up new hires in the systems

2.9 Create and manage reports

## 3.0 Train and Develop Employees

3.1 Develop training strategy, processes and policies

3.2 Design learning content

3.3 Review training materials

3.4 Manage new hire orientation and training

3.5 Develop and train existing employees

3.6 Evaluate and update training materials

3.7 Create and manage reports

## 4.0 Manage Employee Performance

4.1 Develop performance mgmt. strategy and process

4.2 Manage employee performance

4.3 Manage employee career development

4.4 Manage compliance

4.5 Manage time and attendance

4.6 Create and manage reports

## 5.0 Compensate and reward Employees

5.1 Develop comp. and reward strategy, process and policies

5.2 Benchmark compensation against industry standards

5.3 Develop compensation model

5.4 Manage compensation

5.5 Manage benefits administration

5.6 Manage records and recognition

5.7 Create and manage reports

## 6.0 Manage HR Helpdesk

6.1 Develop HR helpdesk strategy, processes and policies

6.2. Service employee enquiries

6.3 Solicit employee feedback

6.4 Create and manage reports

## 7.0 Offboard Employees

7.1 Develop offboarding strategy, processes and policies

7.2 Manage employee off-boarding

7.3 Manage employee placement services

7.4 Create and manage reports



High Automation Potential



Medium Automation Potential



Low Automation Potential

# END-TO-END PROCURE-TO-PAY PROCESS



## 1.0 Manage Procurement Activities

1.1 Develop procurement strategy, process, and policies

1.2 Manage supplier and vendor relationships

1.3 Manage vendor master

1.4 Measure performance

## 2.0 Purchase Goods and Services

2.1 Create and submit requisitions

2.2 Manage requisition approvals

2.3 Create purchase orders

2.4 Manage purchase orders approvals

2.5 Submit purchase orders to vendors

## 3.0 Receive Goods and Services

3.1 Receive goods and services

3.2 Process receipts

3.3 Manage discrepancies and returns

3.4 Manage inventory

## 4.0 Process Invoices

4.1 Manage invoice collection and entry

4.2 Manage electronic invoicing

4.3 Validate and handle invoice data

4.5 Manage matching discrepancies

4.6 Submit transactions for processing

## 5.0 Process Payment

5.1 Complete initial payment review

5.2 Manage payment exceptions

5.3 Run payment process

5.4 Handle payment reconciliations

## 6.0 Generate Reports

6.1 Develop reporting process and policies

6.2 Generate standard reports

6.3 Generate ad hoc reports

6.4 Distribute and manage reports



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# END-TO-END ORDER-TO-CASH PROCESS



## 1.0 Perform Customer Set up and Contract

1.1 Review and accept customer applications

1.2 Negotiate pricing and Terms & Conditions

1.3 Create and update product master

1.4 Manage customer contracts

1.5 Manage Terms & Conditions

1.6 Set up customer in system

1.7 Manage customer data

1.8 Create and manage reports

## 2.0 Assess and Manage Credit

2.1 Establish credit and risk strategy, process, and policies

2.2 Conduct new customer credit assessment

2.3 Perform credit checks

2.4 Develop and manage reports

## 3.0 Manage Quote to Order Process

3.1 Identify, manage, and qualify leads

3.2 Prioritize opportunities

3.3 Create and manage customer orders

3.4 Create initial sales quote

3.5 Approve pricing, discounts, and promotions

3.6 Negotiate and finalize sale

3.7 Create and manage reports

## 4.0 Process and Fulfill Order

4.1 Create order mgmt. strategy, process, and policies

4.2 Process Order

4.3 Manage Orders

4.4 Manage shipping and inventory

4.5 Process returns and exchanges

4.6 Manage rebates and chargebacks

4.7 Create and manage reports

## 5.0 Invoice Customer

5.1 Create invoicing process and policies

5.2 Generate invoices

5.3 Manage billing

5.4 Post receivables to General Ledger

5.5 Develop and manage reports

## 6.0 Handle A/R & Collections

6.1 Develop A/R and collections strategy, processes and policies

6.2 Manage cash applications

6.3 Issue statements

6.4 Conduct aging and bad debt analysis

6.5 Manage customer collections

6.6 Create and manage reports

## 7.0 Manage Cash

7.1 Develop cash mgmt. strategy, process and policies

7.2 Prepare and review daily cash

7.3 Perform balance reporting

7.4 Collect bank reconciliations

7.5 Monitor bank performance

7.6 Create and manage reports

## 8.0 Handle Customer Inquiries / Complaints

8.1 Develop service strategy, process, and policies

8.2 Review customer complaints

8.3 Handle inquiries and complaints

8.4 Communicate resolutions to customer

8.5 Create and manage reports

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# END-TO-END RECORD-TO-REPORT PROCESS



## 1.0 Manage Report to Close

1.1 Develop report to close, strategy, processes and policies

1.7 Complete intercompany activities

1.2 Manage chart of accounts

1.8 Manage fixed assets

1.3 Complete bank reconciliations

1.9 Perform project accounting

1.4 Complete general accounting activities

1.10 Manage inventory accounting activities

1.5 Manage close process

1.11 Complete consolidation

1.6 Handle manual adjustment

1.12 Manage cost allocation

## 2.0 Manage Close to Report

2.1 Generate management reporting

2.2 Generate regulatory reporting

2.3 Generate statutory Reporting

2.4 Conduct budgeting and forecasting activities



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# END-TO-END PRODUCT & SERVICE DEVELOPMENT-TO-CUSTOMER SUPPORT PROCESS



## 1.0 Understand Market

1.1 Understand customer expectations and needs

1.2 Assess economic and environment and competition

1.3 Conduct SWOT analysis

1.4 Review existing customer segmentation

1.5 Review channels strategy

1.6 Evaluate operating model

1.7 Create and manage reports

## 2.0 Develop Products and Services

2.1 Conduct ideation

2.2 Develop new products and services

2.3 Manage product and service portfolio

2.4 Define channels

2.5 Launch new products and services

2.6 Create and manage reports

## 3.0 Market Product and Services

3.1 Develop marketing strategy, processes, and policies

3.2 Create channel, pricing strategy and policies

3.3 Identify marketing vehicles

3.4 Execute and manage marketing campaigns

3.5 Manage marketing activities

3.6 Create and manage reports

## 4.0 Sell Products and Services

4.1 Develop sales and salesforce strategy, processes and policies

4.6 Manage tele-sales activities

4.2 Define channels and sales plans

4.7 Manage salesforce (eg.. agents, distributors, brokers, resellers)

4.3 Develop sales compensation strategy and policies

4.8 Build and maintain relationships

4.4 Manage sales performance

4.9 Develop and manage sales and CRM systems

4.5 Provide sales support

4.10 Create and manage reports

## 5.0 Provide Services to Customers

5.1 Develop customer service strategy, processes and policies

5.2 Design cross sell / up sell and retention strategies and policies

5.3 Manage customer inquiries and complaints

5.4 Manage returns and exchanges

5.5 Provide and manage field support activities

5.6 Create and maintain customer information

5.7 Develop and manage CRM systems

5.8 Create and manage reports

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# END-TO-END MANAGE INFORMATION TECHNOLOGY PROCESS



## 1.0 Create IT Strategy

1.1 Develop Enterprise IT strategy

1.2 Define Enterprise Architecture

1.3 Manage IT portfolio

1.4 Perform IT research and Innovation

1.5 Evaluate IT Performance

## 2.0 Develop and manage IT customer relationships

2.1 Develop IT services and solutions strategy

2.2 Develop and manage IT service levels

2.3 Analyze and manage demand for IT services

2.4 Manage IT customer satisfaction

2.5 Market IT services and solutions

## 3.0 Develop and implement security, privacy, and controls

3.1 Establish security, privacy, and controls

3.2 Manage IT customer relationships

3.3 Implement security, privacy, and data protection controls

## 4.0 Manage enterprise information

4.1 Develop information and content management

4.2 Define the enterprise information architecture

4.3 Manage information resources

4.4 Perform enterprise data and content management

## 5.0 Develop and maintain information technology solutions

5.1 Develop the IT development strategy

5.2 Perform IT services life cycle planning

5.3 Maintain IT services and solutions

5.4 Create IT services and solutions

## 6.0 Deploy information technology solutions

6.1 Develop the IT deployment strategy

6.2 Plan and implement changes

6.3 Plan and manage releases

## 7.0 Deliver and support information technology solutions

7.1 Develop IT services and solution delivery strategy

7.2 Manage IT infrastructure resources

7.3 Manage IT infrastructure operations

7.4 Support IT services and operations



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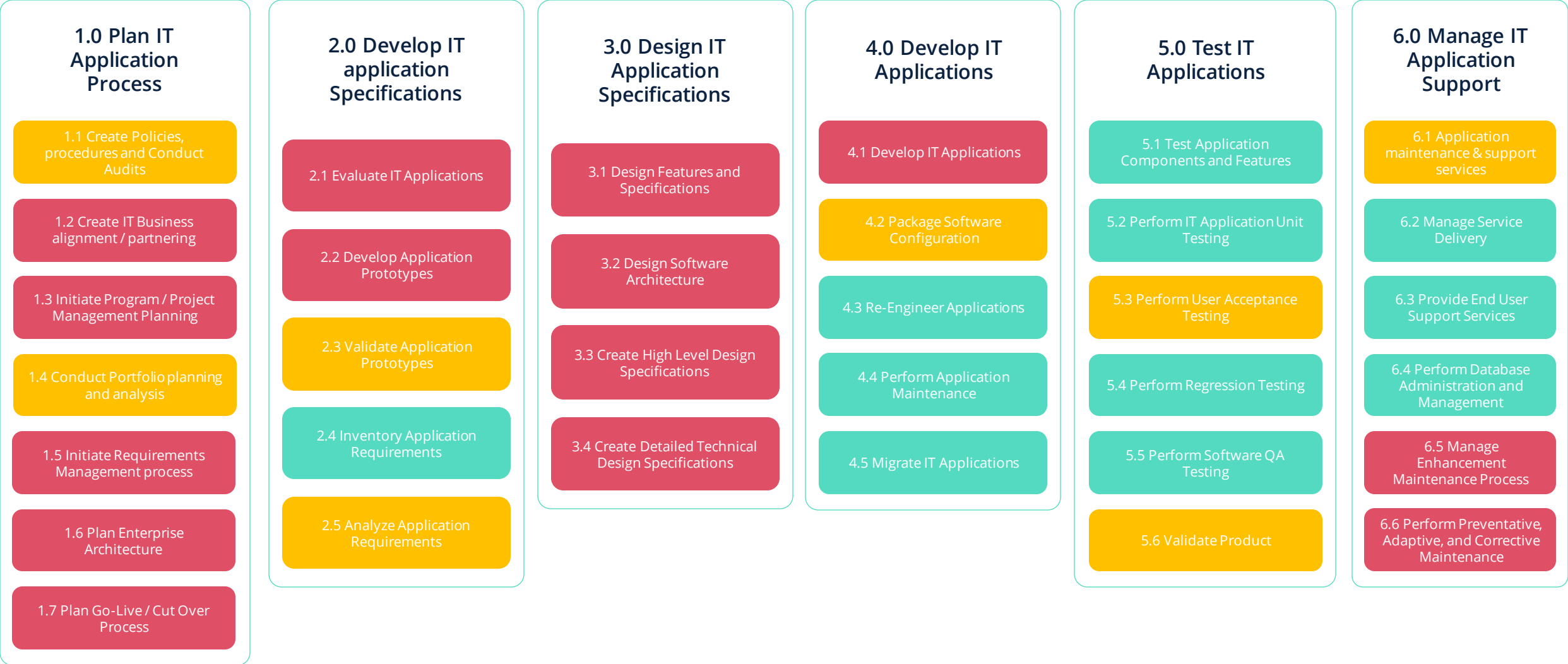





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# END-TO-END MANAGE IT APPLICATION PROCESS



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# END-TO-END MANAGE IT INFRASTRUCTURE PROCESS



## 1.0 Plan IT Infrastructure

1.1 Develop IT Infrastructure Plan

1.2 Conduct Feasibility Analysis and Capacity Planning

1.3 Design Server and Network Architecture Plan

1.4 Create Governance Plan

1.5 Create SOP's and Architecture Policies

1.6 Develop IT Continuity and Disaster Recovery Plan

1.7 Design Configuration, Change and Release Management Plan

## 2.0 Build IT Infrastructure

2.1 Manage Installation, Moves, Adds, and Changes

2.2 Schedule Jobs

2.3 Create and Manage Infrastructure Standards

2.4 Manage Network Security

2.5 Manage LAN/WAN Environments

2.6 Distribute Electronic Software

2.7 Deploy Content Filtering, Firewalls, and Virus Protection

2.8 Update Operational Documentation & Libraries

## 3.0 Run IT Infrastructure

3.1 Manage Systems, Network \* Data

3.2 Conduct Production Control and Scheduling Activities

3.3 Monitor Remote Management (RIMS)

3.4 Perform User Administration

3.5 Provide Helpdesk Services

3.6 Perform QA and Services Audit

3.7 Perform Backups and restorations

3.8 Perform Corrective and Adaptive Maintenance

## 4.0 Manage Data Center

4.1 RIMO

4.2 Perform Monitoring and Control Activities

4.3 Manage Infrastructure Assets

4.4 Provide lights out Support

## 5.0 Manage Network (Data and Voice)

5.1 Manage Configuration and Change Requests

5.2 Manage Incident Response

5.3 Manage Upgrades and Design

5.4 Administer Carrier Management Process

## 6.0 Support End-User Computing

6.1 Initiate Patching Activities

6.2 Conduct Image Management Activities

6.3 Manage Application Packaging

6.4 Deploy Antivirus Solutions

6.5 Administer Global Ticketing Process



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