

### RPA process application - Instructions

The [RPA process application web form](#) is designed to simplify all our RPA projects and provide the data that the RPA team needs to evaluate the process.

The RPA team can only accept initial requests via the web form, please give as much information as possible.

Once the team receives a request, it will evaluate the process and make the decision on whether to start the project and the expected timeframe.

This decision will be taken based on factors like ROI, urgency and necessity. There might be cases where a request will have a low priority or will be rejected completely.

Once a decision is made, the team comes back to you with an approximate deadline and the next steps. Please make sure, you provide any resources or information requested by the RPA team.

#### How to fill in

Form fields	
<b>FULL NAME</b>	The complete name of the person requesting the process
<b>DEPARTMENT</b>	The department where the requesting person works
<b>COMPANY EMAIL</b>	The email of the requesting person
<b>PROCESS NAME</b>	Find a meaningful name for the process. Avoid generic names like 'Delivery bot'
<b>PROCESS DESCRIPTION</b>	Describe as detailed above the different steps of the process, which tools and data are to be used and which people will be involved. Also, think about what should happen if something goes wrong during the process (e.g., a field is not filled in correctly).
<b>SOFTWARE / PLATFORMS/ TOOLS... USED DURING PROCESS</b>	List all the components of the process. This could be a software like Excel or OneDrive, our CRM, a website or a web application.
<b>INCOMING DATA</b>	Where does the data comes from – our CRM, an Excel, a website...etc ( <i>This field is not mandatory</i> ).
<b>OUTGOING DATA</b>	Where / how will the incoming date end up – in an Excel, a web form, our CRM...(This field is not mandatory).
<b>N. PEOPLE INVOLVED</b>	How many people are doing any kind of activity during the process or follow the process? E.g., a delivery process used by 3 PMs. Or a process that includes work from one Coach and one PM. A process that will be used by the whole Coaching Department.

<b>AVRG. TIME NEEDED PER PERSON</b>	The average amount of time each of the involved person spends on the process in hours ( <i>0.25 equals 15 minutes, 0.5 equals 30 minutes and 0.75 equals 45 minutes</i> ).
<b>PROCESS EXECUTION CYCLE</b>	How often is the process needed? Once per week, daily, several times a day or just once (Single Execution).
<b>WILL THERE BE CHANGES WITHIN THE FORESEEABLE FUTURE</b>	Are you aware of any changes in the process, e.g., adding a new country, changing folder structures, adding or replacing tools, changing row IDs etc.
<b>EXECUTION MODE</b>	What will trigger the process? Unattended – The process will be launched at a scheduled time. Attended – The process will be launched manually by a person Both: The process will be launched and a scheduled time with the option to launch it manually as well.
<b>DUE DATE</b>	When would you like to start using process automatization? Please keep in mind that this date is just an orientational date. The final deadline will be defined by the RPA team according to urgency, workload and necessity.
<b>PROCESS OWNER</b>	Who will be the person responsible for the process and the person of contact for the RPA team. Keep in mind, the Process Owner is responsible for reviewing the process, informing the RPA team about any changes and solving issues caused by human mistakes that lead to any errors during the automation.
<b>OTHER COMMENTS</b>	Feel free to let the RPA team know anything that isn't covered by the prior field. Also, you can elaborate urgency, e.g., a campaign cannot start without the process.
<b>UPLOAD FILES (E.G. SPREADSHEETS, SCREENSHOTS...ETC.)</b>	Upload anything that helps to better understand the process: Screenshots, Excel sheets etc.

The more detailed and accurate the provided information is, the smoother and faster your automation project can be rolled out. If you're missing some of the information needed for the request, please investigate and get the answers *before* you send the request.

Also, the Process Owner must have availability for the RPA team during the development and should respond to any inquiries as soon as possible.

## Example

## RPA process application

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FULL NAME *	DEPARTMENT *
Max Mustermann	Production ▼

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COMPANY EMAIL \*

max@bnzs.com

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PROCESS NAME \*

Skillssoft 01\_123 - Marketo delivery

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PROCESS DESCRIPTION \*

Extract all current 'Warm Handovers' with quality check 'Processed' (Row ID 01\_123) and upload them to the Marketo web form.  
We need to deliver the following information from our CRM:

- Name and surname
- Job function (free field from CRM)
- Phone (contact other phone field from CRM)
- Contact email address
- Meeting date
- Lead comment
- Company name
- Full company address
- Industry dropdown
- Company size dropdown

We can only deliver leads with a meeting date within the next 14 days.  
Please make sure we don't deliver any personal emails like @gmail.com.  
We also need to make sure that the phone number matches the company country.

If information is missing or filled in incorrectly (e.g. UK number for FR company), move the leads to quality check 'Rejected Call Back' and send Ruben an email with the contact ID And rejection reason.

Once the leads are uploaded to Marketo, move them to quality check 'Delivered' and send Eduardo an email with the contact IDs of the uploaded leads.

We have a centralized Excel file on OneDrive (I'll give you access) where we need to add the delivered leads.  
Column C, H and AB are filled in manually, the bot doesn't need to make any changes.

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**SOFTWARE / PLATFORMS/ TOOLS... USED DURING PROCESS \***

BNZSA CRM, [Marketo \(https://.marketo.com/bnzsas/test\\_url\)](https://.marketo.com/bnzsas/test_url), OneDrive, Excel, Outlook/Email

**INCOMING DATA**

BNZSA CRM

**OUTGOING DATA**

OneDrive Excel, BNZSA CRM, Email, Marketo

**N. PEOPLE INVOLVED \***

1

**AVRG. TIME NEEDED PER PERSON \***

2,5

**PROCESS EXECUTION CYCLE \***

1 times per

Day

**WILL THERE BE CHANGES WITHIN THE FORESEEABLE FUTURE?**

Yes  No

**EXECUTION MODE \***

Unattended

**DUE DATE \***

2021-11-29

**PROCESS OWNER \***

Maike Mustermann

**OTHER COMMENTS**

Other comments

**UPLOAD FILES (E.G. SPREADSHEETS, SCREENSHOTS...ETC.)**

Dateien auswählen

Keine ausgewählt

Back

Send