Revolutionizing Process Automation With Mendix
Hi!

Bashir Bseirani  
CEO & CTO  
bbseirani@avertra.com

Matt Daniels  
Director of Engineering  
mdaniels@avertra.com
Presentation Outline
About Avertra

We help utility companies build amazing applications

12M customers
30+ hosted cloud servers
300+ features and functions
200K man hours of R&D

Business/IT Services

- Project Management
- Business Process Optimization
- Architecture
- Application Development
- Business Analytics

Verticals

- Utilities
- Consumer Goods
- Travel & Transportation
- Finance
- Public Sector
- Health Sciences
About Avertra

Avertra Locations

USA
Herdon, VA
HQ

Netherlands

Jordan

UAE

India
<table>
<thead>
<tr>
<th></th>
<th>MANUAL</th>
<th>INTEGRATED</th>
<th>AUTOMATED</th>
<th>OPTIMIZED</th>
<th>DIGITIZED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source: Accenture</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manual</td>
<td>12%</td>
<td>46%</td>
<td>24%</td>
<td>12%</td>
<td>6%</td>
</tr>
<tr>
<td>Description</td>
<td>Paper exchange or email integration with ad hoc execution</td>
<td>Standardized &amp; integrated, but requiring significant manual processing</td>
<td>Integrated &amp; automated; limited manual intervention for exception handling, as needed</td>
<td>Integrate &amp; automated; active use of performance monitoring &amp; analytics for continuous process improvement</td>
<td>Integrated, automated &amp; optimized; added ability to dynamically reconfigure workflow and business rules to address ad hoc requirements</td>
</tr>
</tbody>
</table>
The Evolution

Business impact

assisted RPA
- Improve productivity
- Partial automation
- Difficult to scale

Unassisted RPA
- End-to-end automation
- Easy to scale
- Work orchestration
- Robot performance analytics

Autonomous RPA
- End-to-end automation
- Auto-scaling
- Context aware
- Advanced workflow
- Analytics

Cognitive RPA with AI
- Processing of unstructured data
- Predictive and prescriptive analytics
- Automation of tasks that involve judgement

Source: Everest group
Automate Everywhere

Connecting the 4 P’s– Portfolio, People, Process, Platform

- Devices/Applications constantly feeding information and looking for actions to respond to
- Response actions are automatically created & dispatched
- Cloud, On-Premise & Hybrid options to meet the most demanding environments
- Collaboration across the workforce to execute SOP’s
- Centralized analytics engine supported by management dashboards
- KPI performance tracking

MiCustomer Bridges The Gap In Digital Experience
Why Automate

Automation Benefits & Values

**Drastically Improve Response Times:**

Through electronic event-driven capture & dispatch of real-time information and guided instructions to application users

**Lower cost of operation by up to 35%:**

- By digital transformation of manual paper forms
- Automating and streamlining processes freeing up human resources
- Real-time process visibility allowing optimal workforce distribution
- Reduction of process downtime & SLA Management by automating alert to contractor support cycle.
- Real-Time Dashboard monitoring of key metrics
- Reduce Training Cost
- Drive digital customer self service
Why Automate

Automation Benefits & Values

Manage Compliance:
Through electronic audit trails of every transaction for every incident/event. As well as adherence tracking to corporate KPIs.

Increase Safety, Health & Awareness:
• Receive & handle events from instantly
• Real-time monitoring of resource locations and movement for quick dispatch
• Communication digital board to provide real-time information and raise awareness Automating incident response
Automation Approach

**Automation Assessment & Roadmap (2-3 Weeks)**
- Assessment and analysis
- Roadmap presentation and readout

**Implementation (4-6 Weeks)**
- Define detailed requirements
- Agile RPA implementation and UAT

- Mobilization
- Detailed process study and analysis
- Current system architecture and infrastructure study
- Identify automation opportunities and benefits
- Validate automation approaches
- Document findings, define roadmap
- Present automation opportunity assessment report to stakeholders
- As-is and to-be state process flows
- Detailed business requirements and acceptance criteria
- Process re-engineering impact analysis
- Sprint plan
- Test plan and test cases
- Technical design
- Robot configuration
- Solution delivery
- UAT

Agile development cycles with continuous feedback
Increasing Automation Success Rates

Learn
Gather, Analyze, Prioritize

Data collection is key in determining success factors improvement phase

- End-To-End Exception Case Automation
- Automation Meta Data Collection
- Skip and Success Run Metrics
- Manual Exception Case Management
- Granular Session Activity Tracking
- Deep Learning Foundation

Exception Cases Deflected: 50%

Improve
Expand Capabilities & Automation Scenarios

Improve Resolution Path Handling and Introduce New Automation Categories

- Agile rollout of resolution paths and new automation cases
- Address High Impact Automation Scenarios
  - Scalable Process Queuing
- Exceed Manual Resolution Case Reduction KPIs
  - Implement Deep Learning Findings

Exception Cases Deflected: 75%

Expand and Scale
Optimize Success Rates

Capitalize on the automation foundation and broaden to new use cases

- Determine Ideal Bot Automation Scale and Peak Usage Trends
- Optimize Manual resolution for “impossible to automate” cases
- Introduce new types of automation in the organization (voice)
- SDK and Citizen Developer Options Available

Exception Cases Deflected: 85%
Mendix Process Management

Incidents, Tasking, Collaboration, Verifier, Ticketing

WMS, GIS, CRM, ERP, Big Data, Access control
# Utility DCX Platform

## Customer Insight
- Utility Usage
- Content Marketing
- Customer 360
- Customer-Segmentation
- Content Publishing
- Advocacy
- Listening Insights
- Finance History

## Customer Service
- Relationship Management
- Payment Plans/Arrangement
- Cross Channel Bill Payment
- Payment Profiles
- Customer Validation/Fraud
- Budget Billing
- Bill Presentment
- Agentless Start/Stop Service

## Read Workforce
- Read Route Management
- Worker Identify
- Work Order Management
- Geotagging
- Meter Read Fraud Detection
- Digital Knowledge
- Line Extension
- AMI Ready

## Agent
- Auto Case Management
- C&I Key Account
- LIHEAP Module
- Agency Portal
- Guided Procedures
- Agent Insights
- Customer and Location 360
- Cross Channel AI Agent

## Beyond Meter
- Appliance Usage
- Marketplace
- Digital Services
- Program Enrollment
- Behavior Tracking
- EV Location
- Digital Assistant
- IoT Ready

## Social
- Content Planning
- Digital Forensics
- Campaigns
- Bounce Back Management
- Advocacy
- Chat
- Content Publishing
- Social Insights
- Cross Channel Distribution
- Social Segmentation

## CORE (included with every implementation)
- Session Management
- Audience/User Profile
- Collaboration
- Data Engine
- Governance
- Mobile Ready
- Process Automation
- Integrations
- Identity Management
- Bot Automation
- API’s
- Reporting
Use Case- MiBoB

Fully automated exception resolution framework

- Multiple customizable resolution paths
- One application to monitor, track and resolve exceptions
- Integration with multiple enterprise apps
- Live reports & real-time KPI information
Demo Scenario

High Bill Exception Case Automation Journey

**Collecting**
- Gather Billing and Meter Reading Data
- Gather Real Time AMI Reading

**Comparing**
- Calculate comparison consumption
- Use Best of Breed 3rd Party Services

**Proposing**
- Calculate a new Proposed Meter Reading
- Includes defined business rules

**Adapting**
- Define and Retrieve Configurable Tolerance Limits
- Create easy to use, maintainable configuration nodes

**Resolving**
- Determines Resolution Path for Exception
- Resolves Exception case automatically: Reverse Bill, Lock Account, Apply Courtesy Credit, Change Read, Re-Bill.

**Clean-Up**
- Performs post processing steps for the automation case
- Close BPEM case, write Interaction Records, Send Communication
Thank you

Bashir Bseirani, CEO/CTO

+1 703 314 9043
bbseirani@avertra.com
http://www.avertra.com/