



# AGENDA18

FROM IDG

THE YEAR AHEAD IN DIGITAL

March 19-21, 2018

InterContinental Miami Hotel • Miami, Florida

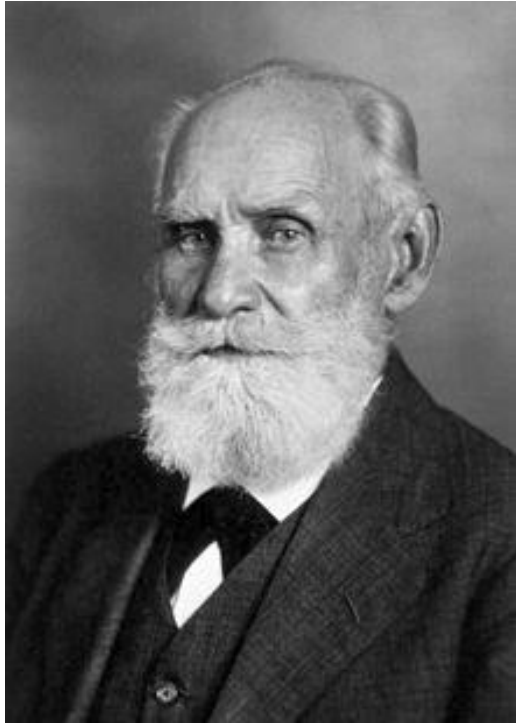
— FROM IDG —



# Lessons on Process Automation in the Enterprise

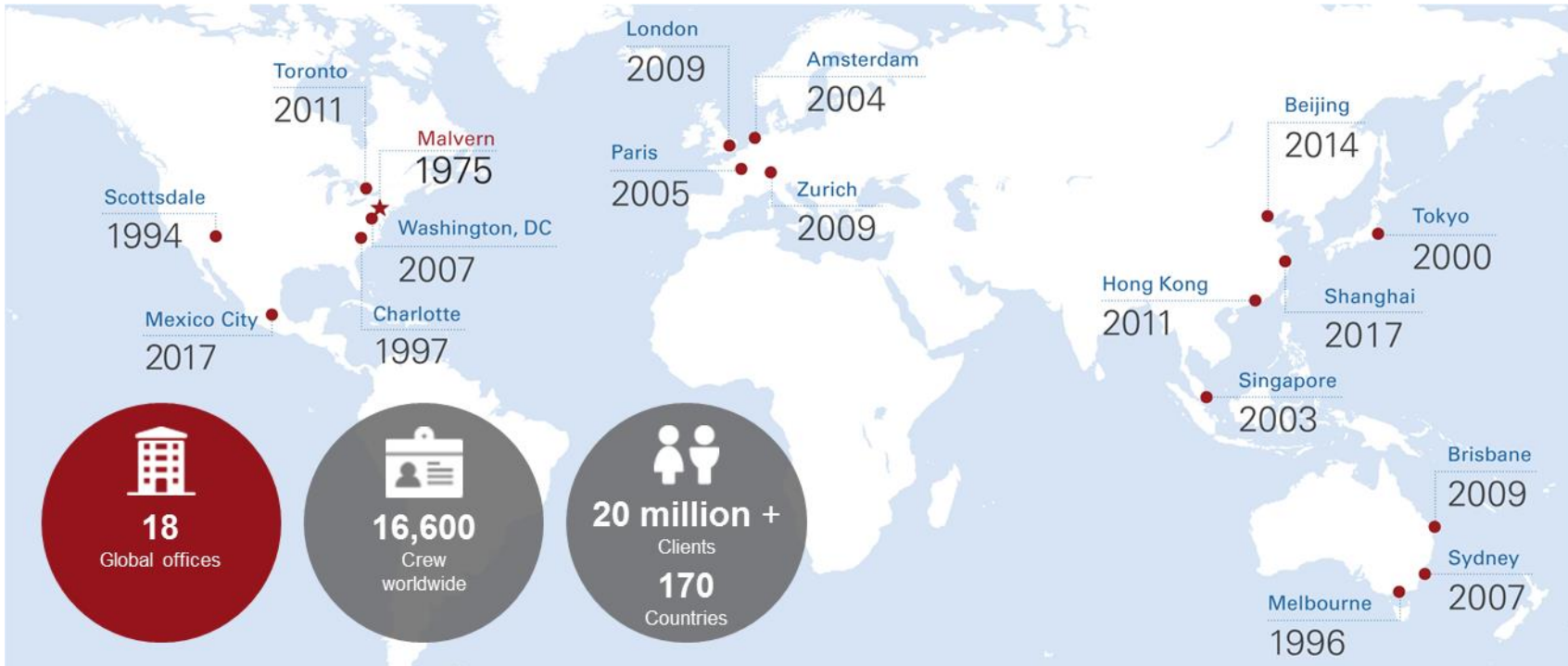
Michael Carr  
The Vanguard Group  
Principal, Retail Systems Integrations







# Vanguard®



## Vanguard clients (\$ billions)



16%	Investment-only
10%	Institutional recordkeeping
40%	Intermediaries
33%	High-net-worth and retail
1%	International*

# A good problem to have...

Growth



#GO DIGITAL

Retail Operations Transformation



Reduce labor costs

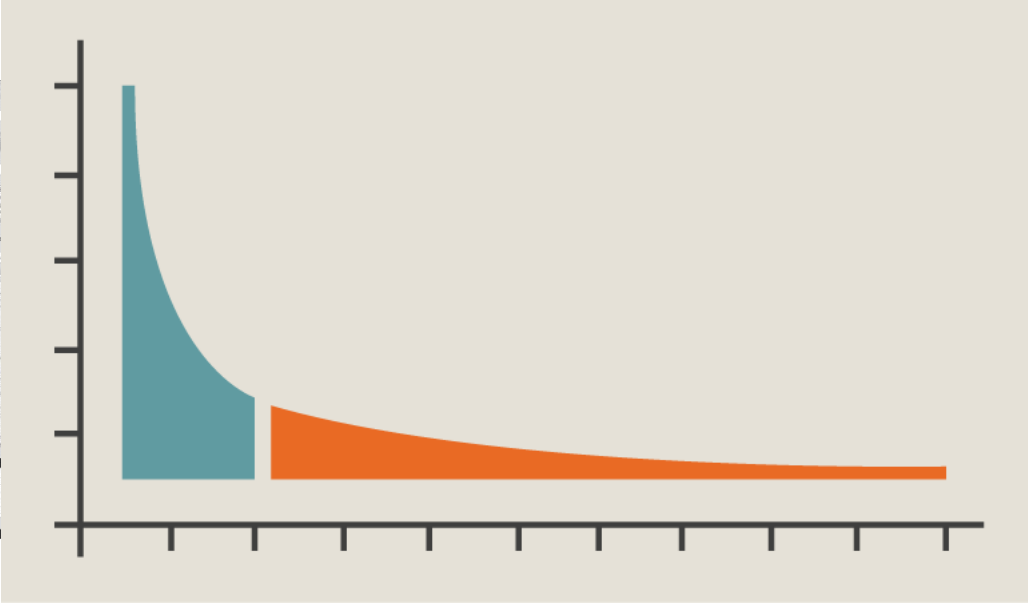
Improve client service levels

Improve work environment

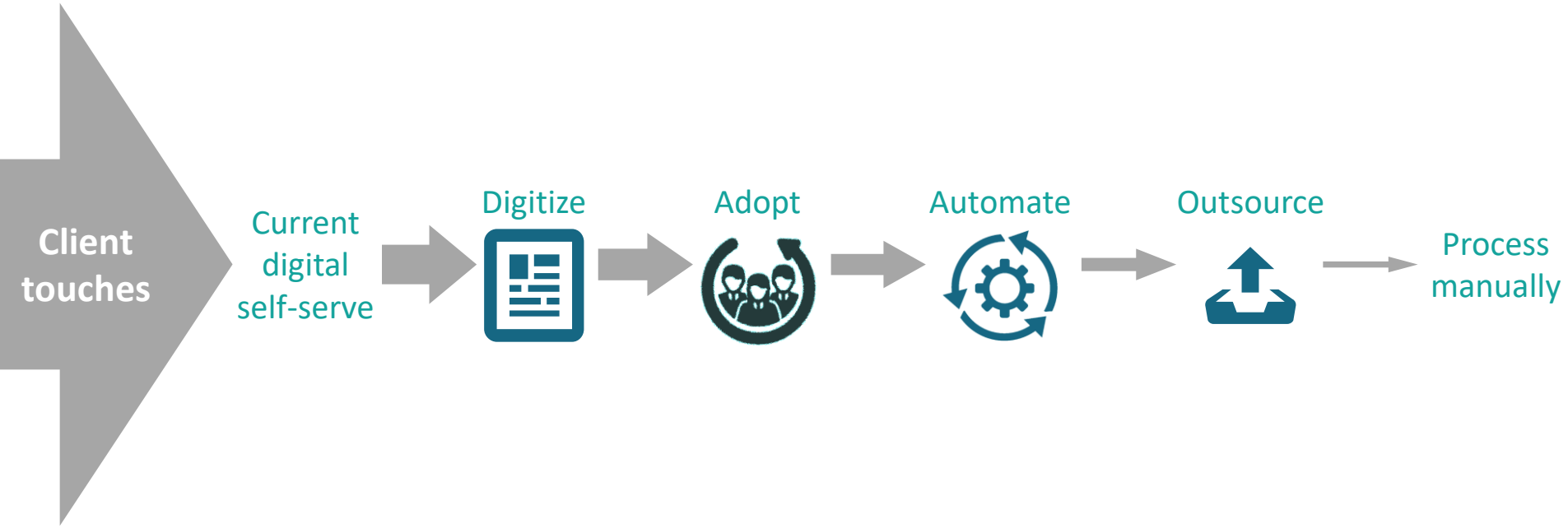


# Broad uses for RPA

Task	Automation Status
1. 'See you 2 - 'What we?'	Yes
2. Repeat post Our Current That sure - post action Team to be made aware o	Yes
3. Progress on Mike Blog This may have had our best and answer - what	Yes
4. Updates on 11 are not used on not use?	Yes
5. I feel know 11's ha	Yes
6. The Blogger's use	Yes
7. More about Mike	Yes
8. Status about Mike	Yes
9. Status of our 11	Yes
10. Options on 11's	Yes
11. continued up post -	Yes
12. Journey to 11's	Yes
13. What Fully 11's	Yes
14. Spotlight on 11's	Yes
15. Work related Out 11	Yes
16. How large 11's	Yes
17. Status of 11's	Yes
18. Working -	Yes
19. More about 11's	Yes
20. To continue from 11's	Yes
21. More about 11's	Yes
22. Status of our 11's	Yes
23. Working on post 11's	Yes
24. More about 11's	Yes
25. Status of our 11's	Yes
26. Working on post 11's	Yes
27. More about 11's	Yes
28. Status of our 11's	Yes
29. Working on post 11's	Yes
30. More about 11's	Yes
31. Status of our 11's	Yes
32. Working on post 11's	Yes
33. More about 11's	Yes
34. Status of our 11's	Yes
35. Working on post 11's	Yes
36. More about 11's	Yes
37. Status of our 11's	Yes
38. Working on post 11's	Yes
39. More about 11's	Yes
40. Status of our 11's	Yes
41. Working on post 11's	Yes
42. More about 11's	Yes
43. Status of our 11's	Yes
44. Working on post 11's	Yes
45. More about 11's	Yes
46. Status of our 11's	Yes
47. Working on post 11's	Yes
48. More about 11's	Yes
49. Status of our 11's	Yes
50. Working on post 11's	Yes
51. More about 11's	Yes
52. Status of our 11's	Yes
53. Working on post 11's	Yes
54. More about 11's	Yes
55. Status of our 11's	Yes
56. Working on post 11's	Yes
57. More about 11's	Yes
58. Status of our 11's	Yes
59. Working on post 11's	Yes
60. More about 11's	Yes
61. Status of our 11's	Yes
62. Working on post 11's	Yes
63. More about 11's	Yes
64. Status of our 11's	Yes
65. Working on post 11's	Yes
66. More about 11's	Yes
67. Status of our 11's	Yes
68. Working on post 11's	Yes
69. More about 11's	Yes
70. Status of our 11's	Yes
71. Working on post 11's	Yes
72. More about 11's	Yes
73. Status of our 11's	Yes
74. Working on post 11's	Yes
75. More about 11's	Yes
76. Status of our 11's	Yes
77. Working on post 11's	Yes
78. More about 11's	Yes
79. Status of our 11's	Yes
80. Working on post 11's	Yes
81. More about 11's	Yes
82. Status of our 11's	Yes
83. Working on post 11's	Yes
84. More about 11's	Yes
85. Status of our 11's	Yes
86. Working on post 11's	Yes
87. More about 11's	Yes
88. Status of our 11's	Yes
89. Working on post 11's	Yes
90. More about 11's	Yes
91. Status of our 11's	Yes
92. Working on post 11's	Yes
93. More about 11's	Yes
94. Status of our 11's	Yes
95. Working on post 11's	Yes
96. More about 11's	Yes
97. Status of our 11's	Yes
98. Working on post 11's	Yes
99. More about 11's	Yes
100. Status of our 11's	Yes

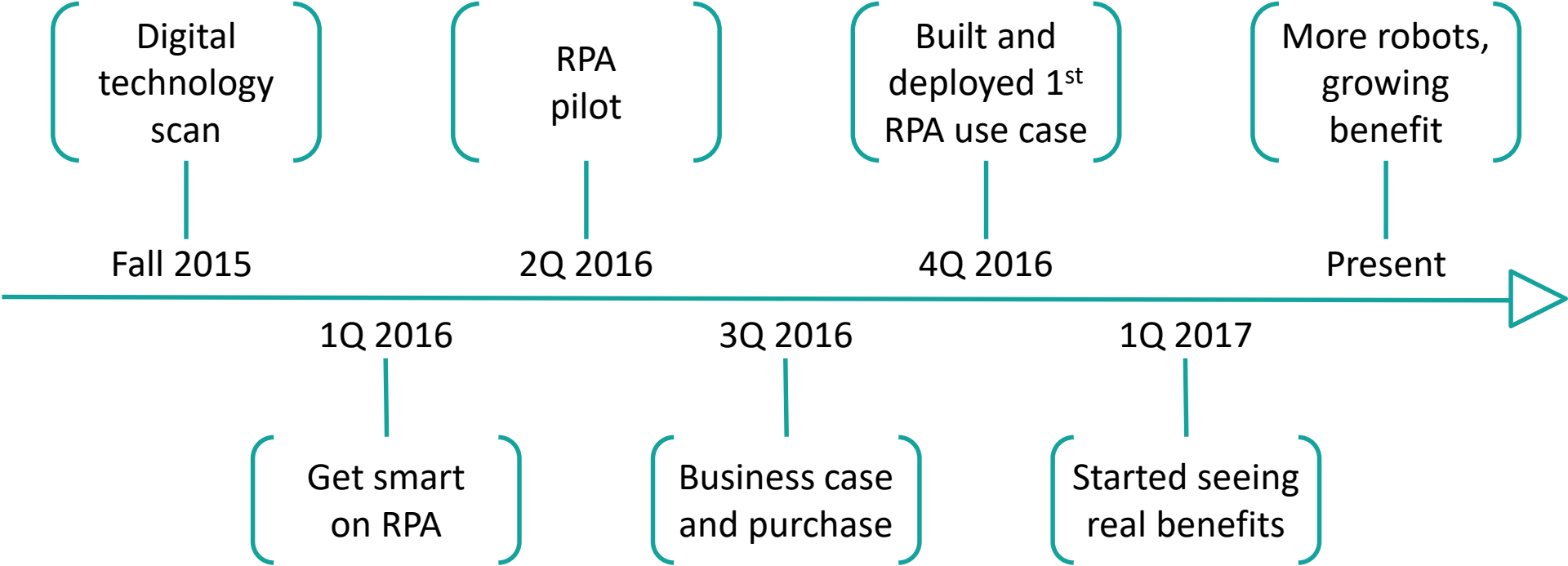


# RPA is part of a larger automation effort...



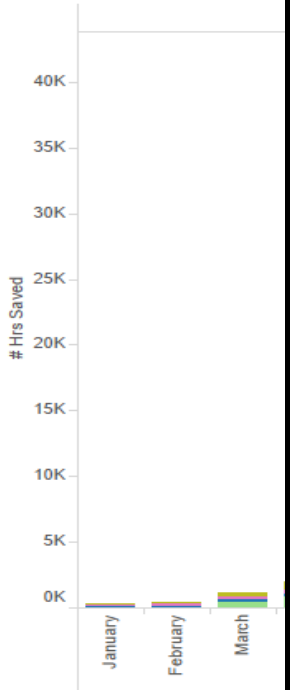


# #GoDigital RPA journey



# #GoDigit

DocuSign, Robotics,



Nov 2017	Dec 2017	Jan 2018	Feb 2018
32.7	89.5	141.1	120.3
-	-	-	-
43.3	233.7	326.3	385.0
-	-	-	-
38.2	229.6	352.0	466.3
5.5	36.8	60.4	69.0
5.2	12.2	19.5	14.6
-	-	-	45.2
0.7	-	1.4	2.0
15.0	54.4	54.0	42.4
13.0	10.8	17.6	16.0
36.3	34.1	45.8	41.7
6.9	11.9	16.1	7.5
30.6	43.1	56.3	40.5
15.6	16.8	25.6	19.7
0.8	1.6	2.2	2.1
	0.8	2.1	1.3
		16.0	34.3
243.8	775.3	1,136.3	1,307.7
2,796.1	3,571.4	4,707.8	6,015.5



# I'm sorry, Dave

What if we become dependent on the robots and...

Fear of prime time

Legal and Compliance folks prefer treating robots like humans

Robots really do need constant supervision

Ops folks sometimes have a hard time letting go of HITL

People stealing work from robots!



# Robots aren't like humans

Robots like different inputs from humans

Calling REST API's instead of navigating screens

Good at finding bugs... and telling you about them

Sensitive to changes that humans can't see → great testers



# If all you have is a hammer...

Just because you can doesn't mean you should

Team gravitated to easier use cases → “Fingers and toes”

Avoid the non-happy path



# If we only knew then...

Maybe break up process steps for robots

Humans can help the robots

Avoid cost myopia

Don't do an RPA program, do an Automation program

Can't outsource to a BTG → Resist!

Business needs to commit to “consequences of success”



# Where we're headed with #GoDigital

#GO  
DIGITAL

Retail Operations  
Transformation

