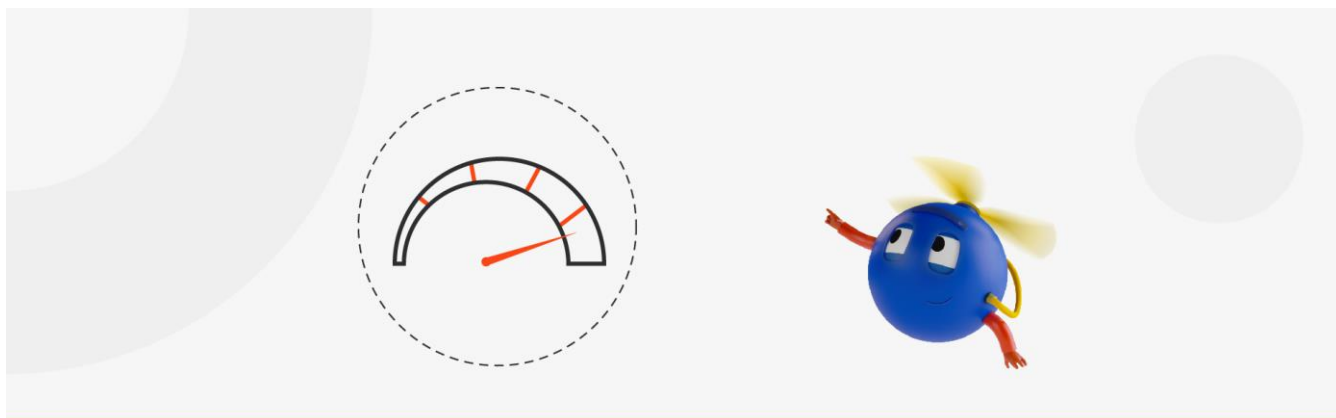


Automation Implementation Methodology

Solving Common Challenges

This handout lists common challenges that you might encounter in the implementation process and the solutions to handle them.



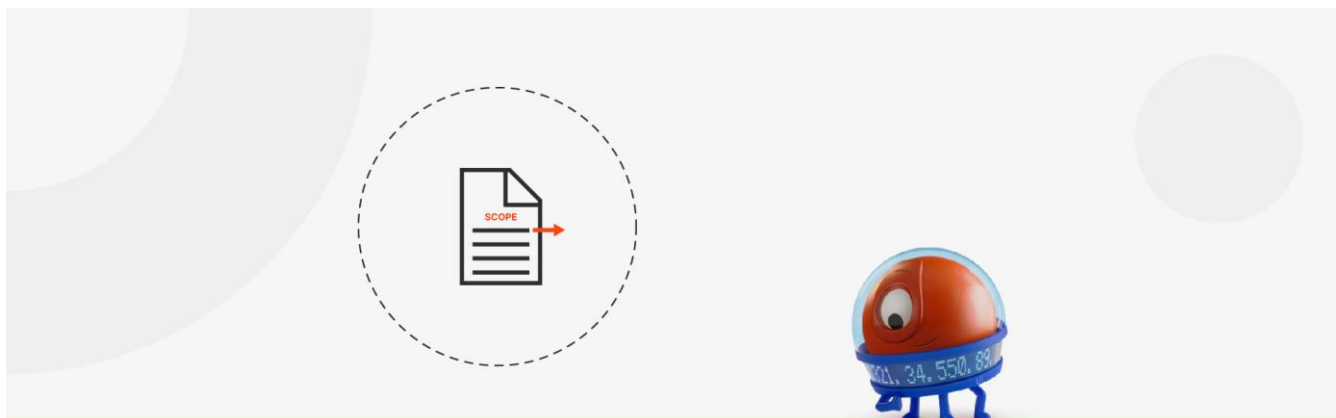
Expectations

High client satisfaction is always a goal of an implementation. One of the best ways to ensure your client is satisfied is by setting expectations early on about what deliverables the client should expect and when they will be delivered. If client expectations differ from what the implementation team is set to deliver, the client is likely to be unsatisfied at the end of the engagement.

Question	Solution
<p>At what stage should expectations be clearly defined and communicated?</p>	<p>At the beginning of implementations, the Kickoff stage is where the high-level expectations for the project will be defined and communicated. At this stage, it is important to reiterate the key points present in the SOW. However, setting specific expectations around the process itself will happen at the Business Case and Technical Validation and Process Analysis stages.</p>
<p>How can we solve this challenge?</p>	<p>We should begin every engagement by understanding the customer's expectations. After gathering enough information from the contract, the next step is to directly confirm the customer's expectations and deliverables by having a conversation with them.</p> <p>During the conversation, start by explaining what you already know about their expectations. This can make the conversation more efficient and help ease into asking about details you need to clarify.</p> <p>By using the Project Kickoff template, you can set expectations and document them. Afterwards, during the Kickoff meeting and by using the deck you can make sure that customer expectations are aligned with what you are actually going to deliver.</p> <p>During the course of the engagement, you should have a weekly project status meeting to ensure short-term and long-term expectations are aligned between the customer and the implementation team. We can use the Weekly Project Status Update deck for this purpose.</p>

What resources to use?

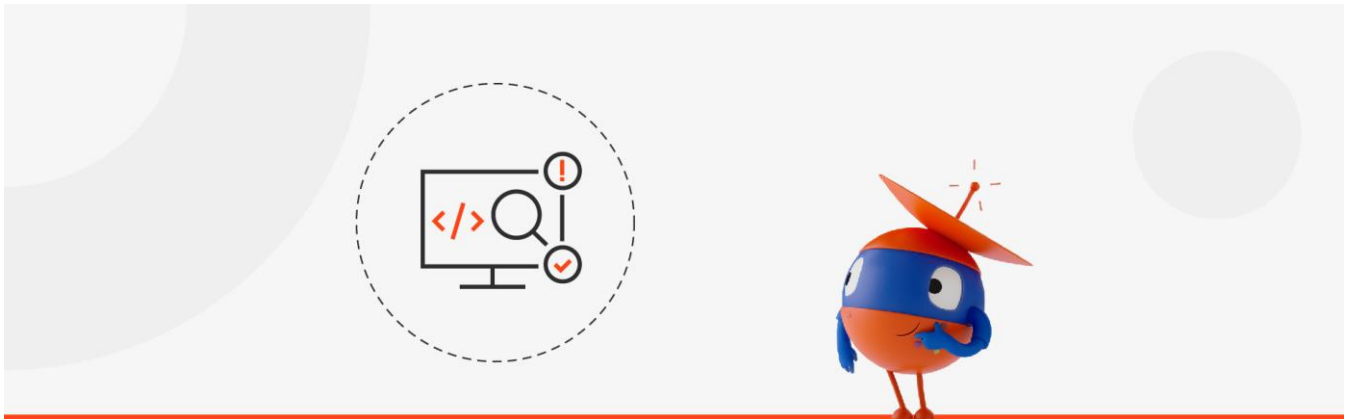
- Project Kickoff template
- Weekly Status Report template



Scope creep

A common concern in any software development project is scope, or what you formally agree to deliver as part of an engagement. In any project, scope is determined early and should be reiterated often to keep everyone on the same page about what is being built.

Question	Solution
At what stage should scope be clearly defined and communicated?	The high-level scope for the project is set at the beginning of implementations, in the Kickoff stage. Later, at the Process Analysis stage, the scope for a specific process or automation is finalized with the approval of the PDD, which defines the scope in detail.
How can we solve this challenge?	As a starting point, we need a Statement of Work (SOW). We start by reconfirming the SOW scope during the Kickoff call and explain how any changes to that scope will have to follow the Change Request process. Anything that might affect the scope will also be addressed during the Weekly Project Updates.
What resources to use?	<ul style="list-style-type: none"> • Statement of Work • Project Kickoff template • Weekly Status Report template • Change Request template • Process Design Document (PDD)



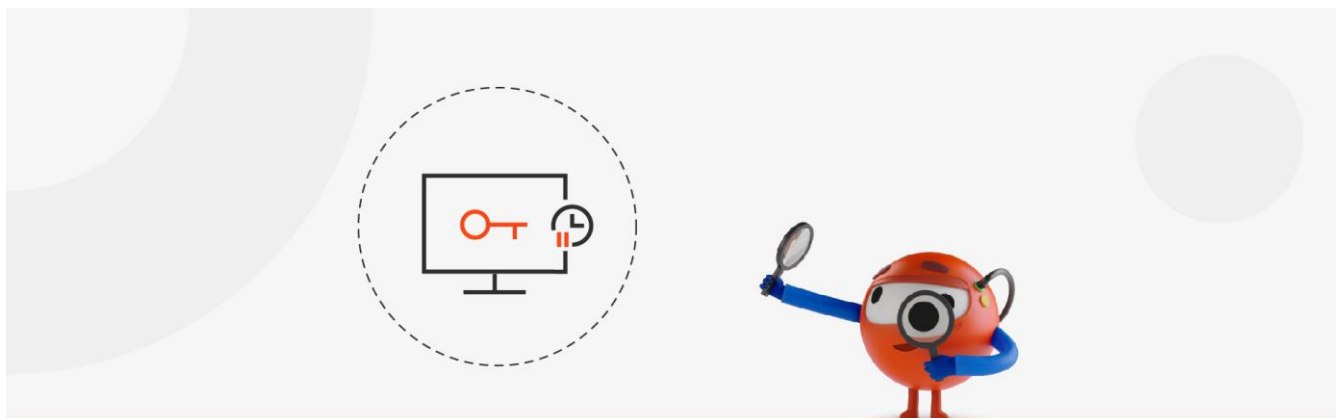
Unorganized User Acceptance Testing (UAT)

Unorganized UAT can happen if UAT tasks and responsibilities haven't been clearly explained beforehand about who is responsible for various steps.

Question	Solution
At what stage should UAT be clearly defined and communicated?	In the Kickoff stage, Process Analysis stage, and Solution Design.
How can we solve this challenge?	<p>It's important to have responsibilities for UAT clearly communicated early in the engagement. During Kickoff, the UiPath team can go through the RACI Matrix and thoroughly explain how the UAT phase should happen. It's also good to try and estimate the effort needed from the UAT participants on customer's side as well.</p> <p>Next, during Process Analysis, once the PDD is completed and approved, the client determines the success criteria and creates the UAT Plan in collaboration with the Business Analyst. The Solution Architect will also be consulted on the UAT Plan, to validate the feasibility of the requirements.</p> <p>The UAT Plan is a document outlining the tests to be performed as well as the logistics for how end user testing will occur after development, such as details on user availability, test data preparation, and cleanup. Clients are responsible for completing the UAT plan, but the Business Analyst may need to assist, depending on their level of experience.</p> <p>Afterwards, during the Solution Design stage, Once a solution has been documented the Solution Architect and Automation Developers work together to prepare the Technical Testing plan, which should encompass UAT scenarios, functional testing, and system integration testing.</p>

What resources to use?

- Project Kickoff template
- PDD template
- UAT Plan template
- Technical Testing Plan template

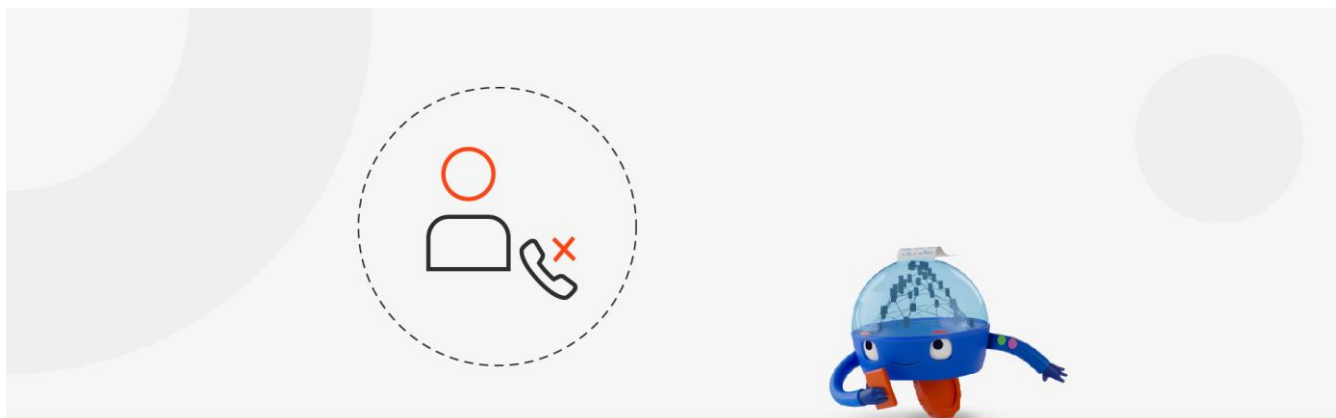


Access delays

Development, testing, and production execution is dependent on having access to systems. Any ambiguity or missed application can halt those phases completely and impact expected timelines. It's crucial to identify what access is needed early in the engagement so you can request it for the relevant team members.

Question	Solution
At what stage should accesses be clearly defined and communicated?	In the Kickoff, Business Case and Technical Validation, and Solution Design stages.
How can we solve this challenge?	<p>During the Kickoff stage, the issue tracker can be used for environment access issues, development roadblocks, UAT failures, or anything else that's impacting the progress of the implementation. Anything that's impacting progress must be discussed with the customer during the weekly project update meeting (the Weekly Status Report template should be used here).</p> <p>Next, during Business Case and Technical Validation, Solution Architects are responsible for identifying the key Complexity, technical dependencies, accesses needed for themselves, the developers, and the robots. This includes any application used in the process, access to Studio and Orchestrator for developers.</p> <p>During the Solution Design stage, the Application Tracker is used to record accesses required by the developer to build the automation and for the automation to be run in UAT and Production. As a best practice, use the Application Tracker as early as the Kickoff stage to record access requirements.</p>
What resources to use?	<ul style="list-style-type: none"> • Weekly Status Report template • Application Access Tracker template • Technology Checklist template

- Issue Tracker template



Customer availability

The unavailability of the customer's process Subject Matter Expert (SME) or Process Owner is a common challenge encountered in projects and is the cause for significant project delays.

Question	Solution
At what stage should customer/users availability be clearly defined and communicated?	In the Kickoff, Process Analysis, UAT, and Business Case and Technical Validation stages.
How can we solve this challenge?	Early in the engagement, we should decide with the customer on the number of subject matter experts required per stage. Especially for UAT, we must set the expectation for how many SMEs are needed and estimate the number of hours required for each.
What resources to use?	<ul style="list-style-type: none"> • Project Kickoff template • UAT Plan template