



# **Robotic Process Automation in Payroll and HR**

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# Agenda

Introduction to RPA

How we started

And kept going

And where we are now

Impacted work

Sample Blue Prism Process

Robot Personal Profiles

Demo

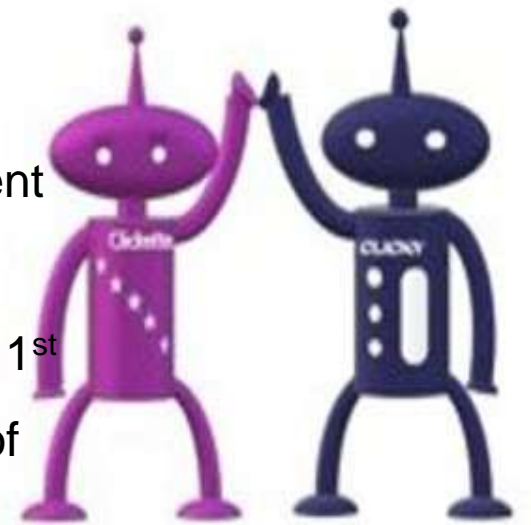
Summary

# Introduction to RPA

- RPA is an automation technology where software is used to emulate the clicks in the steps of repetitive processes allowing time for employees to engage in more value-added work.
- Using rules and identifying screen elements, developers mimic human interactions between software programs like Outlook, Excel, Access, SAP and Adobe Acrobat.
- The robots are highly accurate and easily scheduled and managed with little downtime and can run virtually 24/7
- Each bot is set up with an email address, software licenses, log ins etc. with the same constraints as an employee.
- Using BluePrism as our RPA software provides audit trails to show where the robot has worked and what they have worked on.
- This in effect shifts our organization from being highly transactional to more audit focused and consultative, to better support our workforce.
- Zurich HR Services is a shared services environment with a long-standing focus on LEAN and process improvement.
- By using RPA, we have expanded efficiencies, eliminated waste and promoted employee satisfaction.

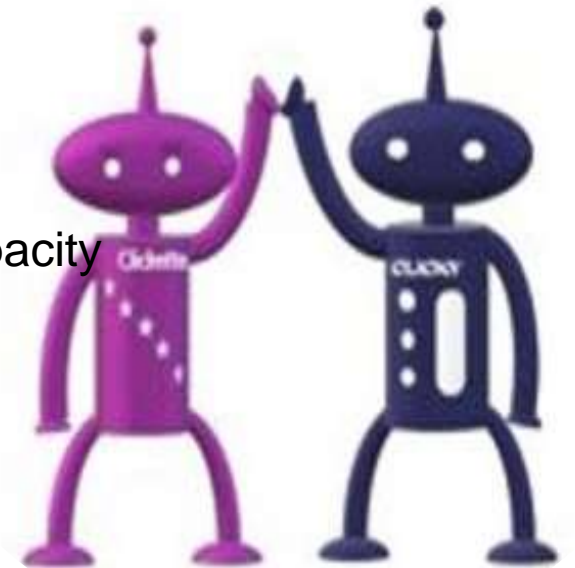
# How we started...

- Zurich had been using RPA in Claims and Finance and HR wanted to try to implement a program, viewing RPA as another lever to pull in our LEAN journey
- A call for volunteers was cascaded to managers
- Two cohorts completed a self-study course which then led to 3 graduates completing a proof of concept, and securing business buy-in.
- We then formed a team that now consists of 4 Developers, each from a different part of HR Services.
- We engaged with all the departments within HR Services to help us name our 1<sup>st</sup> Robot to promote change management and take the fear out of the prospect of moving the work to the bots.
- We engaged with department managers to get the initial ideas for automating work



# ...and kept going...

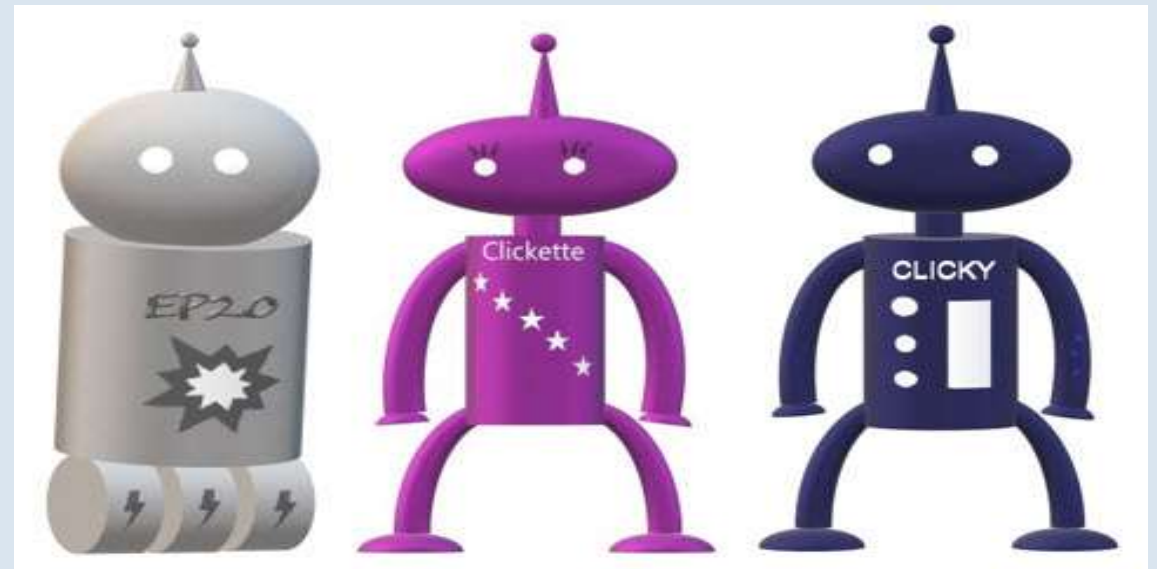
- We considered what *could* be automated and what *should or should not* be automated
- We prioritized the work based on volume, impact and department need
- We met with the subject matter experts and process owners to outline the current manual processes
- We then collaborated how to best automate, while mapping the current process and identifying the steps needed in the new solution(s).
- We created the robot's persona and a getting to know you slide just like all department new hires, to create some fun.
- As we have increased the number automations, we have increased our bot capacity from one to three and replicated the process of creating a persona for each one



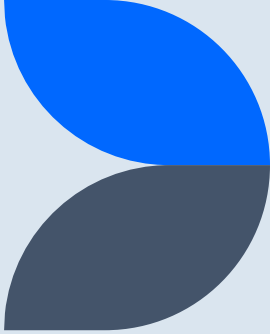
# ...and where we are now.

- Initially, we relied on managers. Starting in 2022 we engaged team members directly to meet with the RPA team and brainstorm ideas for improvements on their personal tasks adding to our pipeline and increasing employee buy-in.
- In 2019, our HR Services' head count was 78. In 2023 it is 77. In the 4 years we have avoided more than 5000 hours of work done by the bots but have not reduced our head count.
- This shift in work has increased job satisfaction and allowed for our employees to further develop and grow. To date the robots have completed over 250,000 transactions!

Time Period	Overall
2019	13,754
2020	34,545
2021	66,491
2022	88,030
2023	27,941
<b>Total</b>	<b>258,702</b>

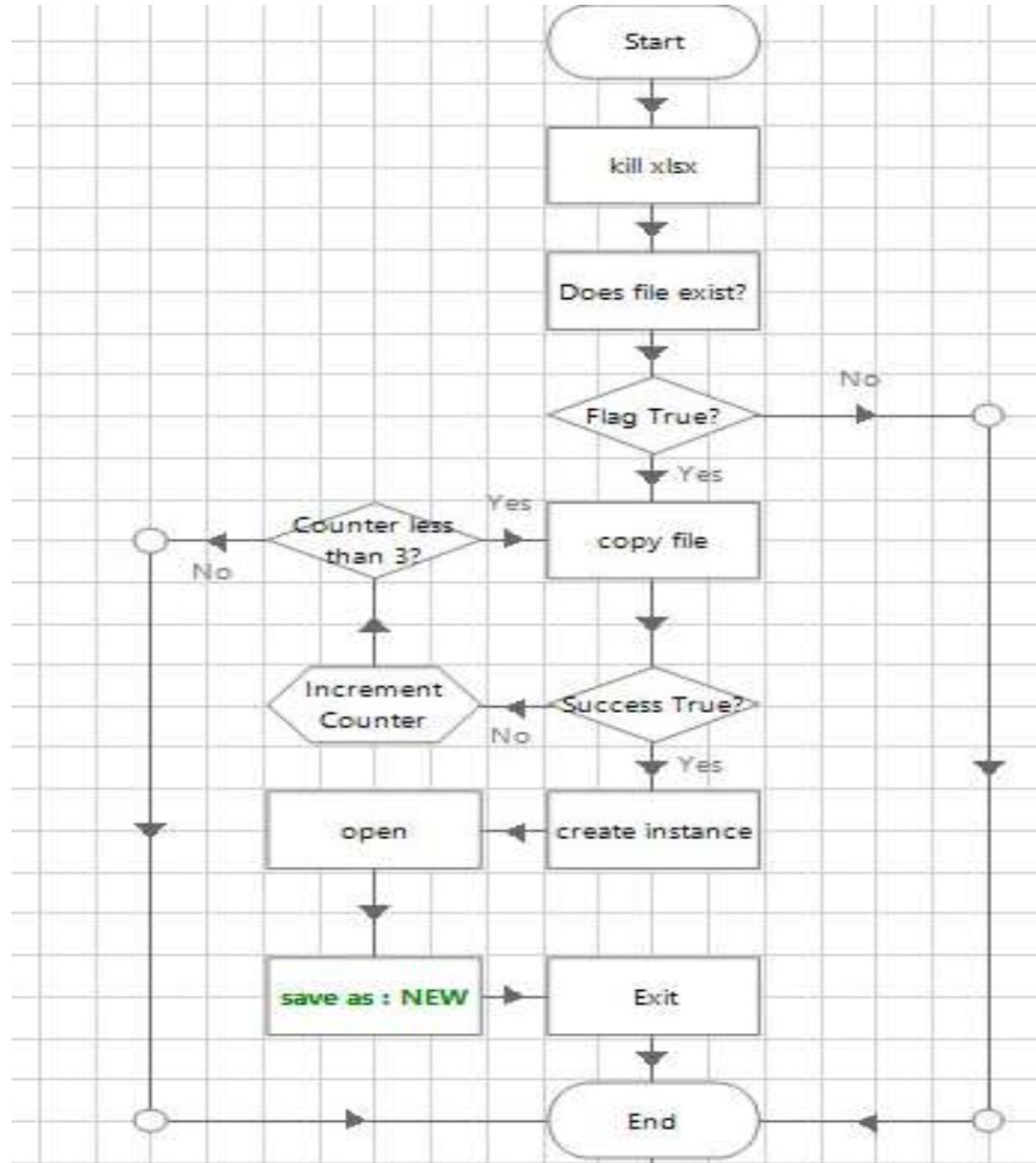


# Impacted work



<b>Currently Automated:</b>	
Closed timecard corrections	Pulling Talent Cards for Succession Planning and Career Development
Payroll Tax Reconciliations	Overtime reports creation for departmental audit
Closing SNOW cases	New Hire Audits
Personnel Records Filing	Payroll Incentive Loads to SAP
Pulling and filing Offer letters from recruiting system	Data pulls for Comm Cell dashboards
Downloading Outlook Attachments for filing	Refresh Tibco Spotfire
<b>In Process or Prioritized for 2023:</b>	
Payroll HSA, 401(k) and Garnishment Reconciliations	
Automate weekly database maintenance	
Internal Movement Audits	
Tax changes for employees who have moved	
eTime File Monitoring	

# Sample BluePrism Process



**This sample process finds an output .CSV file, copies it to a shared drive and converts it to .XLSX for use in another program. The programming is similar to creating a flowchart with actual actions and decisions.**



# Introducing Clicky

## HR Services Employee Spotlight

Meet: CLICKY  
Position: Virtual Helper  
How long have you worked at Zurich? 1 Month



Favorite Food: Data	What is something you would like to learn to do? Salsa dance
Favorite Music: Heavy Metal, but Dial-Up Modem is my favorite vintage sound	Name something on your "bucket list": Travel
What is your favorite season? Any season with access to the cloud(s)	Have you ever met anyone famous, if so, who? R2D2
Where did you grow up? I haven't grown up yet, but I'm getting smarter everyday	What is your favorite vacation spot? The 2W Social Hub is nice
Favorite Movie? Star Wars	What is your favorite team to cheer for? HRServices Volleyball
What is your favorite TV show? BattleBots	Hobbies & Interests? Aconso Filing
What is one of your guilty pleasures? Trying to increase my processing output each day	When you were younger what did you want to be when you grew up? Shiny and Fast

# Introducing Clickette

## HR Services Employee Spotlight

**Meet: Clickette**  
**Position: Virtual Helper**  
**How long have you worked at Zurich? 2 Months**



Favorite Food: PTO time swaps	What is something you would like to learn to do? A cartwheel
Favorite Music: Techno and Electronica	Name something on your "bucket list": 50 gallon drum
What is your favorite season? Cloudy with a chance of meatballs	Have you ever met anyone famous, if so, who? K-9 of Doctor Who
Where did you grow up? In the mind of the RPA team	What is your favorite vacation spot? CTC_E_Data Queue in Blue Prism
Favorite Movie? Big Hero 6... Baymax is dreamy!	What is your favorite team to cheer for? HR Services
What is your favorite TV show? Doctor Who	Hobbies & Interests? Timecard Edits
What is one of your guilty pleasures? Racing against Clicky	When you were younger what did you want to be when you grew up? Faster than Clicky

# Introducing EP2.0

## HR Services Employee Spotlight

Meet: EP2.0

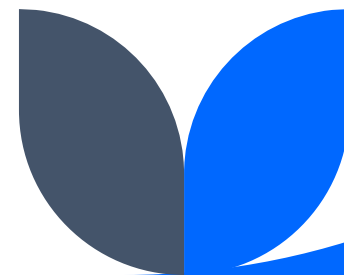
Position: HR Services Bot I

How long have you worked at Zurich? 6 months



Favorite Food: New Hire Documents	What is something you would like to learn to do? Alteryx workflows
Favorite Music: Anything with a beat	Name something on your "bucket list": home depot orange buckets are nice
What is your favorite season? Sunny with a chance of cloud computing	Have you ever met anyone famous, if so, who? Mitch Sparber!
Where did you grow up? In the hearts of the RPA team	What is your favorite vacation spot? BluePrismWorld or Los Angeles
Favorite Movie? iRobot	What is your favorite team to cheer for? L.A.Lakers
What is your favorite TV show? The Marvelous Mrs.Maisel-laughter is good for the soul	Hobbies & Interests? Poker, gin or spades games
What is one of your guilty pleasures? executing vba code	When you were younger what did you want to be when you grew up? Myself, authentically, of course. What else could I be?

# Demo



# Summary

Zurich Services has implemented a home-grown RPA program that:

- Reduces transactional tedious data entry work
- Upskills HR employees interested in learning RPA
- Engages all employees to transform their work
- Increases accuracy and expands capabilities
- Shifts focus of HR work to more human interactions with our customers
- Allows for a more consultative and audit focused Payroll team

## Questions?





# Thank you!

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