

CASE STUDY

# The Firstsource Automation League

## Democratizing automation at Firstsource with citizen development

Firstsource brings the promise of citizen development to life, making work easier and better for thousands of employees and customers.



## Power to our people

People add the magic to a business, and digital transformation is about giving them the tools and skills they need to be wow. But digital transformation needs to happen faster, and we believe the key to speeding it up lies in democratizing automation: making it easy for people to identify opportunities and then design and build their own automated solutions.

Citizen development, as it's known, is a hot topic. You can read more about it—along with our ambitions and approach—in 'A bot for everyone: how to fast track digital transformation in your organization'.

## Off the page and into practice with Automation League.

In September 2020, we launched a pilot to put citizen development to the test across two of our largest business units. We worked with outstanding automation and training partners to develop a winning methodology: the Firstsource Automation League.

And it's delivering:

- January 2021: 100+ bots developed and ready to be used by 1000+ Firstsourcers
- April 2021: Scaling of bots starts
- By June 2021: we aim to deploy 95% of these bots across 400+ employees

Citizen developed bots are already adding value to our internal processes, and to our clients' businesses.

By 2023, the number of active citizen developers at large enterprises will be at least four times the number of professional developers.<sup>1</sup>

Gartner

### Leading digital telecom provider



Bot automates data entry



Reducing errors + freeing up time



Saving client > \$275k



Our first-hand experience gives us significant insight into what it takes to implement and run a successful citizen development program at scale. This case study summarizes the key lessons we've learned along the way:



## 1. Automation boosts productivity

People are happiest when they're productive—and that means achieving more, not doing more. Robotic Process Automation (RPA) frees them from tedious and repetitive admin chores, giving them more time to delight customers. Traditionally, it's worked top down, with the IT team providing solutions for key workforce challenges. But things slow down as challenges pile up in the IT inbox.<sup>2</sup>

## 2. Ground up is better for everyone

Automation League changes the rules of the game. Rather than having one Centre of Excellence (CoE) rolling out RPA across the organization, our approach creates smaller CoEs within each business unit. We put the route to a solution in the hands of the people who best understand the challenge—the workforce. This means:

- Bots get used because they work, not because people are told to use them
- Bots are shared across teams and become best practice
- IT Professionals provide guidelines and governance only, and have more time to focus on putting innovative new technologies to work for your business
- Productivity and morale soar, making it easier to attract and retain the best talent

“We've found that people are more engaged and invested in digital solutions when they've been part of creating them.”

**Sundara Sukavanam,**

Chief Digital Officer at Firstsource



### 3. Recruit, select and celebrate for success

Democratizing automation doesn't mean everyone needs to be a developer. The goal is to demystify bots and encourage people to use them to be their best.

#### Recruit by role

Train people with roles dominated by manually-intensive tasks—e.g., Finance, HR, Training and Auditing. That's where bots have the greatest impact.

#### Select by aptitude

Some people have more tech interest and aptitude than others. Prioritize them for training increases your chances of creating brilliant bots.

#### Celebrate and reward

Celebrate great bots and reward the people who create them. Recognition made our 'Citizen Bot Developers' proud evangelists for automation, and positive internal PR built excitement and momentum. The best and most enthusiastic went on to become 'Power Users': creating and sharing more bots within their line of business unit and working alongside IT to identify bots that might be useful to the wider organization.

Automation League pilot: facts and stats

- Launched across 2 x business units: +/- 600 people
- 450 raised their hands
- 100 selected: a manageable, statistically relevant, number
- 76 graduated as 'Citizen Bot Developers'
- 12 (+/- 15%) are now 'Power Users': regularly creating and sharing time-saving bots
- >1k Firstsourcers are now using bots created during or since the pilot

“The first bot I developed automated Reward and Recognition certificates. Each batch used to take me about 4 hours to personalize, now they're done in 10 minutes! I've now created 6 other bots to help the team save time and money.”

Lavanya

HR admin executive, Firstsource





#### 4. Training needs to include mindset, method and mentoring

Our project planning research highlighted the importance of training in both the mindset and method of automation skilling supported by rigorous mentoring. Our proprietary Automation League training methodology, developed in collaboration with UiPath and Tiny Magiq, reflects this. And we used the pilot to test and optimize it.

#### The art of automation

Before anyone gets busy developing bots, they need to identify which tasks Robotic Process Automation (RPA) is best able to help them with. In collaboration with leading digital transformation trainers Tiny Magiq, we developed a curriculum to help with this. It harnesses motivational techniques around the cumulative power of small changes based on Stanford behavioral scientist B.J. Fogg's model of creating tiny habits.

Participants used the Magiq Spark mobile journaling app to:

- Identify and prioritize bottlenecks in their process
- Develop positive ideation habits
- Get quick and constructive support from mentors
- Develop storytelling skills to present ideas internally and persuade others of their worth

The app uses gamification techniques to reward and engender consistent behavior.

“Firstsource is embracing the power and potential of citizen developers with StudioX. It's a pleasure to partner with an organization as committed to unlocking human potential through automation as we are.”

**Brandon Nott**

SVP - Product Management at UiPath

“It's heartening to see the impact Firstsource citizen developers have created in a short period of time.”

**Sukumar Rajagopal**

Founder & CEO, TinyMagiq

“I now take 5 mins out of each day to jot down process pressure points in a journal. This gives me ideas for future bots I can create and reminds me that I need to create them!”

**Jane**

Telesales Executive, Firstsource

## The science of automation

Gamification techniques also encouraged and rewarded people as they were trained on UiPath's outstanding Studio X platform. No programming experience? No problem. StudioX makes it easy to:

- Identify tasks perfect for automation
- Build, publish and run their own automations

StudioX works without IT infrastructure changes. But you do need to ensure everyone can access it on devices they're comfortable using.

## The classroom in action

Our citizen developers worked together in small teams—the 100 in our pilot were divided into 5 groups of 20 each. Individuals within teams supported and encouraged each other, and each group was assigned three experienced mentors: an Automation Champion (to advise on the technical side of things) and a Process Owner (to advise on the business application of bots) and a Tiny Magiq mentor (to identify and overcome roadblocks). The virtual classroom sessions were led by UiPath trainers and experts helping participants get their bearings in place from basic coding perspective.

Training took 11 weeks in total:

- 4 x weeks of e-learning and virtual classroom sessions
- 1 x week of ideation
- Ideas were evaluated and prioritized by the Automation Champion and the Process Owner
- 6 x weeks developing automations

Training was adapted and evaluated to ensure it was highly engaging and effective even when delivered remotely.

“I don't know the first thing about coding, but I've created a software assistant that automates 90% of the holiday hours I used to have to enter manually. Now I can focus on the best bits of my job and my bot saves \$2,400 a year.”

Laura

Team Assistant, Firstsource

“Pulling together summary reports used to take ages. Now the bot chases the team for me and collates all their data in one spreadsheet. All I need to do is check it and push send to my line manager. The bot saves me 460 days a year, and it's saved the business \$56,355.”

Poonam

Team Leader, Firstsource





## Bots that do the business

Automation League pilot: facts and stats



## Automation skilling in a league of its own

The Automation League has saved our business time and money. It's made our people even happier and boosted our service to clients. We're now putting our first-hand experience to work for our customers. We're helping them to establish and run efficient and effective citizen development programs that realize their digital transformation ambitions. The Automation League adds value to their organizations by improving productivity and both employee and customer satisfaction.

To find out more about how the Firstsource Automation League framework can help take your business to the next level, please [click here](#).

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### References

- 1 The Future of Apps Must Include Citizen Development (gartner.com)
- 2 Connectivity benchmark report | MuleSoft



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## Helping customers **stay ahead** of the curve through transformational technologies and capabilities

Firstsource Solutions Limited, an RP-Sanjiv Goenka Group company, is a leading Provider of transformational solutions and services spanning the customer lifecycle across Healthcare, Banking and Financial Services, Communications, Media and Technology and other industries.

Our 'Digital First, Digital Now' approach helps organizations reinvent operations and reimagine business models, enabling them to deliver moments that matter and build competitive advantage.

With an established presence in the US, the UK, India and the Philippines, we act as a trusted growth partner for over 100 leading global brands, including several Fortune 500 and FTSE 100 companies.

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