Blue Prism
Enterprise RPA RFI/RFP Template

Version 1.0

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Company Overview

Please attach information detailing your organizational structure, including the following: parent company and subsidiaries; number of years in business and headquarters location. Provide an introduction to your company, its history, and the development history of your primary solutions.

List the contact information that will serve as our primary contact.

Please outline your partner/alliance strategy. Include various classifications of partners.

What are your competitive advantages compared to your major competitors?

Provide a general overview for each of your products.

List the product(s) and product versions you are proposing in this RFI/RFP to meet our requirements.

Please provide information related to the RFI/RFP scope and objectives where you have thought leadership to share. Please use this space to provide information related to the RFI/RFP scope and objectives not covered elsewhere within your RFI/RFP response.

General

Do you provide software robots? If yes, please summarize the key characteristics as to how you meet this paradigm. For example, where is work executed? How is it controlled? How is scale achieved?

Operational Performance & Productivity

System Performance

What features are provided to support efficient execution of automations?

How are automations affected by performance variations in the target applications?

Productivity

Can you describe how your solution manages throughput and improves productivity?

Intelligent Execution

What do we need to be aware of in terms of system availability and network performance that could impact the automations?

Security

Data Security / Access Security

Can you provide a client reference case where your product has been subject to a third party or external vulnerability or penetration assessment? Please provide details of the nature of the assessment e.g. what was the architecture used?

Describe how your solution manages access and credentials to target applications?

Development & Maintenance

Speed of Development

Does the technology have a "record" function to record agent desktop activity to generate scripts?

Does the technology have a design configuration by objects approach using a meta-language and integration wizard?

What skillsets are required to develop or configure your solution?

After recording a process, what opportunities are there to add in additional features such as alerting and auditing? What does this entail, what skills are required, and how long does it take?

Ease of Maintenance

How do you manage process consistency? How much human effort is required to manage a large-scale deployment? Can you provide an indication of the ratio of the number of people needed to manage the robots? How autonomous are the robots in execution?

How is change management handled when underlying applications UI changes?

Governance, Risk & Control

Control

Describe the skillset required to capture audit information?

Describe the technological controls that:

- Ensure data privacy?
- Provide visibility and enable effective management of your automation solution?

How does your product capture and secure audit information?

How do you ensure process consistency?

Describe the process by which processes are developed and put into production, what is the Operating model for the development cycle in terms of control of who can do what job roles?

Is the product designed so that individual users can record automations and put them live on their own desktops?

Systems Audit / Process Execution Audit

Describe the capabilities of your product to support forensic investigation of incidents, including:

- Platform changes?
- Changes to process execution?

What information is made available as a result of executed automation?

Resilience

Load Balancing / Redundancy & Failover

How does the architecture apply load balancing to ensure that flexible use of the infrastructure is used at peak periods?

Describe the shared components and how they can be configured to support:

- Multiple geographies?
- High-availability?
- Business continuity?

Process Resilience

How does your product respond to unexpected events (for example, unexpected pop-up boxes, data formats, or screen re-designs)?

How does your product respond to and recover from target system interruptions and outages?

Methodology & Business Implementation

Operating Model

How would you describe the organizational changes required to maximize the value from the automation solution?

What are the key business risks associated with integrating your automation solution within the organization?

What best practice do you recommend for mitigating and addressing these risks?

Can you describe, providing client examples where possible, the business benefit that has been realized following implementation?

Describe your approach for process selection and delivery of process automation efficiencies for the human workforce and software robots?

Development Methodology

Describe your process development methodology?

Customer Support Framework

Describe the support structure required post-implementation?

Certification

Do you provide a certification or accreditation standard? If yes, please provide details.

Scalability

Deployment Model

Please describe your deployment model and explain why you recommend this approach?

How do you ensure robot consistency?

Work Allocation & Manageability / Spans of Control

Describe your products capability to handle:

- A multi-geography process landscape distributed across multiple business functions?
- Differing business priorities and scheduling constraints?

To what extent can this dynamically adapt to changing circumstances and volumes of work across different business units throughout the day?

How many humans are typically required to support a deployment of this scale and complexity? Please provide client examples which also specify the number of: geographies, sites, data-centers, processes and "bots" deployed

Communication amongst Virtual Workers

How is a single body of work assigned to multiple robots for simultaneous processing? So for example, please describe how you would take a spreadsheet containing 10,000 items from a network drive and divide it between 100 robots?

Product Feature – Ease of Use

Who are the intended users of your product?

Explain capabilities for modular robot development and reuse of elements / sub-tasks**.**

Explain the different mechanisms for triggering a robot to perform an automated process for:

- Manual / human operator initiated
- Time-based scheduling
- Event triggered (what kinds of events)

Describe the ability for controlling automated processes.

Please provide documentation (i.e. screen images, etc.) demonstrating how a process is designed utilizing your product. What is the development approach with your RPA tool? Who is a typical user of the development tool in your product and what is the required skill set?

Explain how the automated processes can adapt to changes in the enterprise environment? An example would be a change in a screen results if fields are relocated.

How flexible is the tool to build and modify tasks for automation?

What kind of debugging and troubleshooting techniques are available?

Describe how business users interact with automated processes.

List the automations that are included in your standard product (i.e. interacting with Microsoft Office applications, etc.)

Product Feature – Integration

Describe other methods in which automated processes can integrate with endpoint applications.

Describe how do you ensure that your solution is non-invasive to existing applications that are currently utilized in any automated process?

Detail your product's ability to integrate with other systems through REST or SOAP web services, so a process can be triggered by the receipt of a message and can respond with collated information

Describe and depict with the aid of a diagram how your product can be implemented to work with a web based workflow application through which users will interface with robotics. (Diagram can be submitted as a separate file)

Detail your product's capability in automating the use of applications accessed over terminal services client and Citrix (remote from where your software can be installed).

Describe how the solution integrates with the following components:

- web services
- APIs
- user interface/ presentation layer
- transactional/application server
- message queues
- data
- email
- file transfer
- databases
- SOA architectures

Describe how your product integrates with HTML

Describe how your product integrates with HTML tables

Describe how your product integrates with web forms

Describe how your product integrates with BPM tools

Describe how your product integrates with mainframe host screens

Describe how your product integrates with Java applications

Describe how your product integrates with PDF's

Describe how your product integrates with ODBC connections

Describe how your product integrates with Microsoft Office application suite (i.e. Word, Excel, Outlook, etc.)

Describe how your product integrates with home grown applications.

Product Feature – IT Governance

How is promotion from development via test to production handled?

Describe how your product can be utilized by with Version Control Systems (i.e. change control) for promoting process automations into a Production environment.

How does your product maintain version control of robots/scripts?

Describe how your product can compare versions of robots/scripts within the same environment and across multiple environments (i.e. Development, Test, and Production).

Describe how audit logs are maintained.

Describe how automated processes can be compared across environments.

Describe what capabilities exist for auto push of configuration changes, upgrades, bug fixes, etc.

How does your tool support multiple environments for process automations (development, UAT, Production)?

Describe if your product supports remote maintenance and support, and if so, how.

Product Feature – Insight and Analytics (Reporting and Dashboards)

Does the application provide reporting functionality?

Can additional reports be easily created? If yes, how can it be created?

Can report definitions be saved for future use?

Describe the level of granularity available for reporting.

Are there audit logs generated by your product? If so what level of details does it contain?

The solution should provide runtime reporting capabilities that thoroughly document the result of all successful and failed actions taken by the script.

The solution must have the ability to send reports into external report archive systems.

The solution must have the ability to deliver problem alerts, run status, and reports via email as needed.

Product Feature – Internationalization

Describe how your product supports multiple languages including double byte characters

Infrastructure

Describe the various solutions supported by your product (i.e. on premise, cloud, Software As A Service, etc.)?

Please include your recommended architecture diagram, specifications, and configurations. Please describe how this architecture scales to meet increases in demand.

What are the hardware and software requirements for your solution? Please include versions of the software.

Does your product support running on virtualized server(s)? If so, provide a detailed description and illustration of the virtualized software components.

Describe how your product supports automating processes for the following technologies:

1. Mainframe
2. Unix
3. Java
4. HTML
5. Web Based applications
6. Applications running in a Citrix environment

What are the database DBMS, O/S and hardware requirements for your solution?

Please include your recommended architecture diagram, specifications, and configurations. Please describe how this architecture scales to meet additional capacity needs.

Does the tool depend on components that must be installed on the workplace operating system?

Specify which of the components are, or use, commercial 3rd party products that have been integrated into the solution. State the product, vendor, and current version used. Confirm that all 3rd party products are in full vendor support and whether 3rd party licenses are required.

Product Delivery

Describe your delivery methodology. Detail how the solution will be implemented and managed as a project or program delivery. Include the following in your description:

- Delivery organization (e.g. direct delivery, partner delivery, vendor and partner delivery, etc.)
- Project/program organization
- High level timescales for delivery against the proposed solution
- Key milestones
- Key Deliverables
- Measurement of success
- High level effort estimate
- Experience

What roles and responsibilities are required to deliver your product? What are the skill requirements for each product delivery role?

On average, what is the typical lead time to deploy the product?

Describe your methodology for reviewing processes to increase process efficiencies.

Describe your methodology for reviewing processes to increase data quality.

Provide details on what the recommended operating model would look like for your solution. Required skillsets, competencies and recommended number of support staff should all be included.

Training

Describe your training program. Include how knowledge transfer is achieved between your organization and the customers.

Describe the customer's ability to be self-sufficient on your product offering. Include a timeline in which self-sufficiency can be achieved.

Are user guides available?

Are e-Learning modules or videos available on how to install/use/operate the solution?

What technical documentation will be made available? (e.g. installation/configuration guide, etc.)

How is Training delivered? What is the entry level for the client? Technical ability? Accreditation?

Product Support Services

Describe how support for your product is provided?

Describe your Service Desk SLA's.

Describe the availability of your support team, i.e. hours, dates, time zones, etc.

Describe how customers place service requests.

Describe how support is provided for implementing release major and minor versions of your product.

Describe how upgrades are generally performed. Include if customers need to be on the most recent version in order to upgrade to the next release.

Describe how customers can collaborate and share information.

Do you maintain an active user group? Year established? How often do you meet (and where)? Date of last conference(s)? Number of attendees at the last conference(s)? Please provide a typical agenda for the Users Group.

Product Roadmap

Detail the roadmap of planned major releases for your product and target release timeframe.

How many times a year do you release major and minor versions of your product?

Describe how future product functionality is determined.

References

At a minimum, details for at least 3 case studies must be provided in the sections below. Please provide specific relevant business case experience where you have implemented similar solutions related to the RFP objectives. Client names may be masked if required for confidentiality reasons.

For each client reference, provide the following details:

- Business Sector

- Size (in terms of revenues and/or number of employees)
- Countries where product is deployed
- Number of processes automated (include a definition of a process)
- Number of robots deployed (include a definition of a robot)
- Overview of customer's deployment team
- Overview of customer's support operations team
- Overall ROI
- Number of FTE equivalent automated work per month – robot productivity

Case Study #1

Please provide specific, detailed information in the form of a case study to support your organization's experience

Case Study #2

Please provide specific, detailed information in the form of a case study to support your organization's experience

Case Study #3

Please provide specific, detailed information in the form of a case study to support your organization's experience

Pricing

Do you provide services for programming robots for a proof of concept? If yes, do you charge for proof of concepts? If no, what limits do you have for the sizing of proof of concepts?

What is your pricing model for products, professional services, and maintenance?

What is your pricing model for utilizing Professional Services post Production Go Live?