

# CASE STUDY

**The Nordics' largest financial services group creates a robotic processes Centre of Excellence to increase organisational knowledge, standardise methodology and deliver service improvements.**



## The organisation

Nordea is the largest financial services group in the Nordic region. It is one of the biggest banks in Europe with over 30,000 employees. In 2017, it had a total operating income of EUR 9.5 billion and held total assets of EUR 581 billion. Including its Nordic home markets which, combined, are the world's 10th largest economy, Nordea has a presence in 20 countries. Nordea's shares are traded on the Helsinki, Stockholm and Copenhagen stock exchanges.

## DIGITAL WORKFORCE AS STRATEGIC PARTNER

Digital Workforce has worked closely with Nordea since 2015. Working together, they establish, grow and maintain the company's robotic workforce. Digital Workforce also delivers Robotic Process Automation consulting services and management mentoring. In addition, Nordea accesses training via the Digital Workforce Academy, a Blue Prism training partner awarded a Gold Service Provider certification.

Furthermore, to support Nordea's shared services centre in Lodz, Poland, Digital Workforce established Poland's first Robotic Process Automation competence centre in the city in 2017. Over the course of the following year, Nordea and Digital Workforce together built a new distributed service delivery model.

**In order to establish the new model,** it was essential to win the trust of the independent robotics teams spread throughout the Nordea organisation. Digital Workforce enabled this process with strong expertise, proven methodology and extensive support services.

Digital Workforce's dynamic services are continuously matched with Nordea's RPA use and internal skills. This way, the best possible support is directly matched with need throughout the company's rapidly evolving robotics journey.

More recently, Nordea has entered the

operationalisation phase of its RPA journey, and is focused on perfecting the management of its digital workers. To do this, it has utilized Digital Workforce's expertise in designing and implementing a centralised robotics delivery capability and a scalable RPA operating model. Digital Workforce supports Nordea to develop data logging guidelines to ensure process integrity, measure RPA benefits and set up design boards. The Digital Workforce team has also assisted with handover processes to track compliance, and is introducing a new platform format that will speed up development and testing and reduce risk when scaling up to production.

## Nordea + Robotic Process Automation

Nordea's Robotic Process Automation journey began in 2015 with a proof of concept. The company was motivated by the prospect of reducing operational costs. But it soon learnt that RPA also makes sense in other ways. For example, it could help the business to respond in an agile way to changing customer expectations and thereby remain competitive.

In the early years, robotics at Nordea was decentralized. Projects were run independently without common guidelines. However, by 2017, the number of active RPA projects had increased significantly, so Nordea decided to set up its own Robotics Centre of Excellence to improve organisational oversight. The new centre of excellence team began by building internal alignment and shared focus. This would allow Nordea to start taking steps towards becoming an industrial user of RPA.

As Nordea has become a more mature robotics user, it has increasingly realised RPA's value in fulfilling regulatory requirements. RPA has also shown to help in improving operational quality and productivity. RPA has also proved its value in reallocating employees' time to more valuable work – the work they were hired to do – instead of performing routine administrative tasks.

By 2018, Nordea had robotised over 300 processes. This translates into 4.3 million cases handled by robots – equivalent to handing back 427,000 hours to the business. The company now employs 130 people working with robotics.



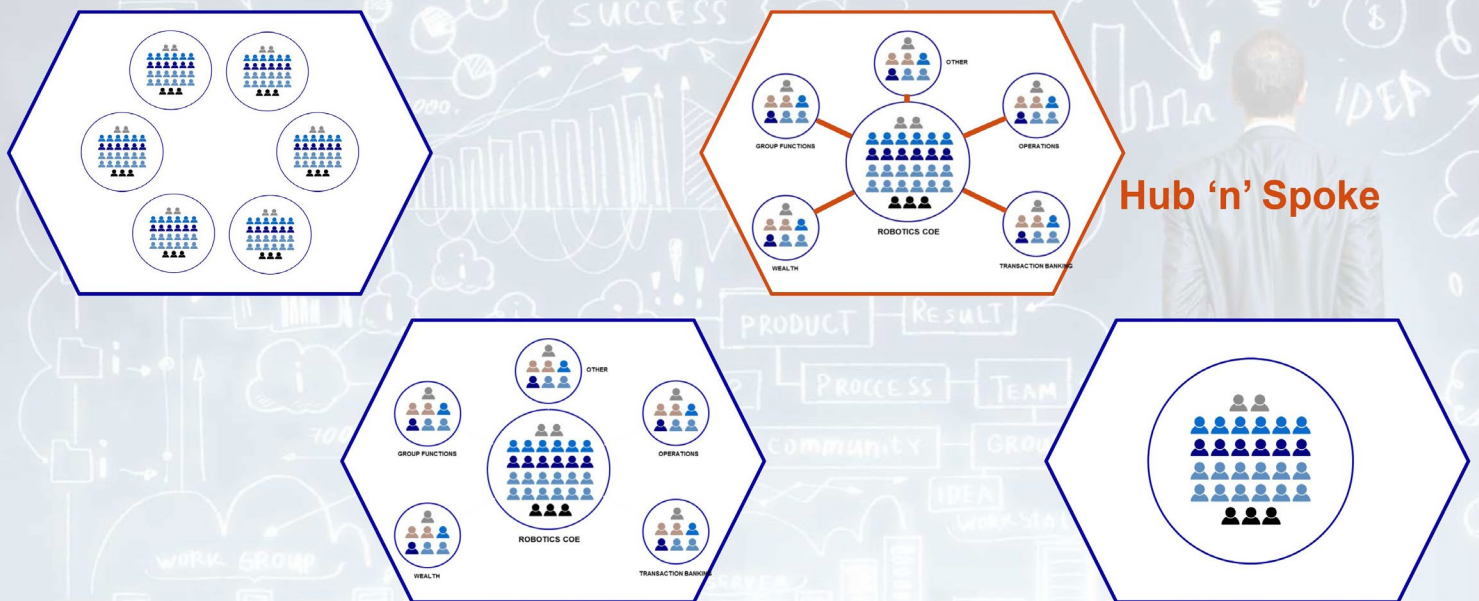
# ORGANISING ROBOTICS CAPABILITY WITHIN THE ORGANISATION

MOVING FROM DECENTRALISED TEAMS TO THE “HUB-N-SPOKE” MODEL



Organization

**Robotics@Nordea – You can slice the cake in countless ways, we have tried many**



Nordea’s early RPA was driven by a handful of individuals scattered across the organisation. Although all Nordea’s RPA projects shared a common technology platform (Blue Prism), teams were otherwise working in a decentralised way. They ran independent processes which were selected and run without common guidelines.

With the setting up of the new Robotics Centre of Excellence team, the company moved from decentralised organisation to an approach it termed the “hub-n-spoke model”. The Centre of Excellence team took conceptual ownership of Nordea’s robots, overseeing a system for the common definition of robotics, the allocation of funds, application methodology, technology platform, compliance, risk assessments, guidelines and instructions.

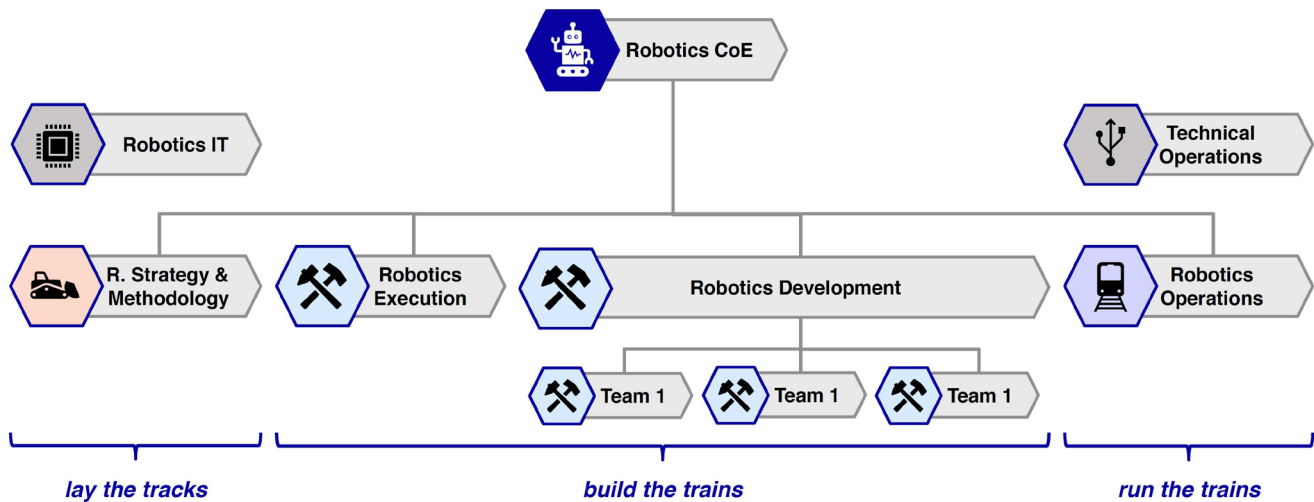
Smaller robotics teams, known as satellites, operate at the end of each spoke. They continue to operate locally and maintain their own controllers and developers.

Using the hub-n-spoke model has allowed Nordea to retain local knowledge and sustain effective and speedy internal service. The local teams own their projects but report back to the Centre of Excellence.

# The Robotics Centre of Excellence

Nordea's Robotics Centre of Excellence includes expert teams that together cover the whole spectrum of skills needed for RPA. Team competencies range from setting up the right conditions for success, through developing the robots, to their ongoing operation.

## Robotics@Nordea - organized along the value-chain



<p><b>STRATEGY AND METHODOLOGY TEAM:</b> Building foundation and guidelines</p>	<p><b>EXECUTION TEAM:</b> Pipeline hunters and project managers bridging the gap between end customers and developers</p>	<p><b>OPERATIONS:</b> Scheduling, controlling and maintaining robots, managing customer relationships</p>
<p><b>DEVELOPERS:</b> Configuring robots and maintenance</p>	<p><b>ROBOTICS IT:</b> Improving underlying IT infrastructure</p>	<p><b>TECHNICAL OPERATIONS:</b> Running underlying IT structure</p>



*“In the beginning, selecting processes to automate may seem simple. Processes considered for automation are often ranked based on their volume and complexity. However, if you try to scale up with this thinking, you end up with a very messy automation portfolio that is onerous to maintain.”*

**JAN THÜMMEL,**  
Co-Head of Robotics  
Nordea

# SELECTING THE RIGHT PROCESSES TO AUTOMATE

The challenging task of bringing the company's independent automation projects under central supervision fell to Nordea's Centre of Excellence team. It formulated a clear automation pipeline strategy to ensure that all projects are aligned with organisational goals and are run efficiently.

CONSIDERED ASPECTS WHEN FORMULATING THE STRATEGY INCLUDED:



**WHAT DO WE WANT TO ACHIEVE WITH AUTOMATION?**



**WHAT ARE OUR PRIORITIES?**



**ON WHICH PARTS OF THE ORGANISATION DO WE WANT TO FOCUS?**



**WHO ARE OUR STAKEHOLDERS?**

As a result of the new strategy, automation efforts were focused on key parts of the organisation to ensure maximum efficiency and benefit from synergies between processes. Instead of tinkering at the edges, the new focus resulted in clearer outcomes and made collaboration easier.

All of Nordea's processes considered for automation have to be thoroughly strategically analysed and evaluated in terms of return on investment. Nordea is highly aware of the importance of understanding the true costs and returns of automation. It has focused on harnessing all benefits and making them visible.



# SUCCESSFUL COLLABORATION

To ensure the successful robotisation of Nordea's processes, its Centre of Excellence promotes strong collaboration between its internal customers, the robotics unit and IT. It has proved crucial that Nordea's IT team sees RPA as a complementary solution, rather than as a rival.

The support of Nordea's management team has been especially important in eroding resistance to robotics and allaying fears. This has helped staff to embrace change. Senior management is committed to making the necessary investment in robotics. Crucially, it is also willing to take the heat when faced with challenges. This commitment has created a strong dynamic between the Centre of Excellence and company management which has, in turn, enabled rapid advances.



## FUTURE STEPS

Nordea is looking forward to adding more automation technologies to its tool box. Thus, it will move further in Intelligent Process Automation. In 2018, the company introduced additional technologies, including Optical Character Recognition (OCR), chatbots, and Machine Learning (ML) to complement the existing Robotic Process Automation.

Nordea sees a future where intelligent technologies – such as ML or OCR – take on the role of a “brain”: analysing data and learning from it. Meanwhile, RPA executes orders; working as the “arms and legs” of the brain.