Proposal for

Intelligent Automation CoE and Governance Establishment

What's in this Proposal

Annex 1
About **Simply**ai

Introducing
simply**ai**

WE	• have a unique, multi-disciplined offering combining **intelligent automation** and **data modernisation**
	• operate across **Australia** and **New Zealand**, with offices in Auckland, Wellington, Sydney, Melbourne, Brisbane & Perth
	• employ more than **150** Intelligent Automation Specialists, Data Architects, Engineers & Developers

simply**ai**	• has delivered over **1000** automations into production since 2019
	• has more than **100** clients across the insurance, financial services, government, utilities, retail, property and health sectors
	• is a **specialist system designer** and **integrator** with deep expertise in UiPath, Microsoft, Snowflake, H2O.ai, Data Bricks, Informatica,, Automation Anywhere, Blue Prism and Alteryx

THE COMPANY	• simply**ai** was established in 2019.
	• a highly skilled and certified ANZ workforce augmented by an offshore ecosystem from India, Columbia and the Philippines
	• acquired by Liverpool Partners in June 2023, a leading Australian mid-market private equity group which has >$1B in funds under management

At simplyai, we make artificial intelligence *work* for people.

Topic 1

Executive Summary

Executive Summary

A summary of the benefits of partnering with the Simplyai team

Simplyai[1] is pleased to present a proposal that leverages our services and the capabilities of the Microsoft technology stack to accelerate the enablement of Automation & AI capabilities.

The **Simplyai** proposal is aimed to deliver the following key benefits:

- Outlines the approach, timelines and activities to assist your organisation with implementing an automation & AI operating model that continuously and sustainably improves your enterprise approach to automation

- Offers options for a leave behind capability framework that builds internal automation expertise, remaining fit-for-purpose at any scale

- Delivered and supported by a strong team with decades of experience behind them, delivering in a defined three-week engagement period

- Leverages the Strategic Partnership between **Simplyai** & Microsoft to deliver sustainable automation and AI solutions that are aligned with your digital transformation vision
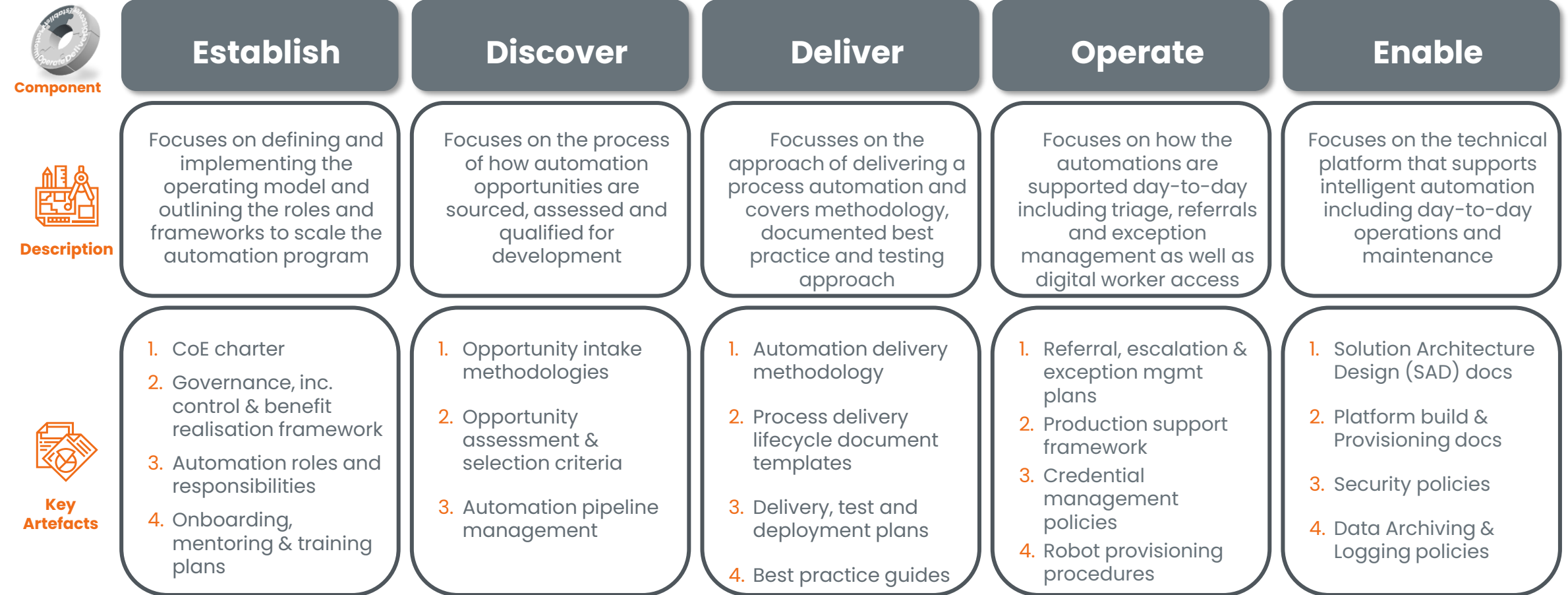
[1] See Annex A for further details on Simplyai

Topic 2
Our Approach

Automation Operating Model Establishment

We will apply our governance blueprint based on our in-depth operating model experience to tailor a CoE approach that meets your long-term needs

Component

Description

Key Artefacts

	Establish	Discover	Deliver	Operate	Enable
Description	Focuses on defining and implementing the operating model and outlining the roles and frameworks to scale the automation program	Focuses on the process of how automation opportunities are sourced, assessed and qualified for development	Focusses on the approach of delivering a process automation and covers methodology, documented best practice and testing approach	Focuses on how the automations are supported day-to-day including triage, referrals and exception management as well as digital worker access	Focuses on the technical platform that supports intelligent automation including day-to-day operations and maintenance
Key Artefacts	1. CoE charter 2. Governance, inc. control & benefit realisation framework 3. Automation roles and responsibilities 4. Onboarding, mentoring & training plans	1. Opportunity intake methodologies 2. Opportunity assessment & selection criteria 3. Automation pipeline management	1. Automation delivery methodology 2. Process delivery lifecycle document templates 3. Delivery, test and deployment plans 4. Best practice guides	1. Referral, escalation & exception mgmt plans 2. Production support framework 3. Credential management policies 4. Robot provisioning procedures	1. Solution Architecture Design (SAD) docs 2. Platform build & Provisioning docs 3. Security policies 4. Data Archiving & Logging policies

Topic 5

Next Steps

Next steps

Some potential next steps to consider

We recommend the following next steps to further explore the **simplyai** capabilities and services:

1. Confirm that our understanding of your needs is accurate

2. Confirm the proposed scope

3. Commence COE Establishment and Platform & Capability Build

Thankyou.

simplyai

Making Artificial Intelligent *work* for people