IEEE, the world's largest technical professional organization dedicated to advancing technology for humanity, recently announced the availability of IEEE 2755.1 standard (2019 Guide for Taxonomy for Intelligent Process Automation Product Features and Functionality). Rochelle Hood, SSON's Global Head of Customer Analytics and Research, met with Lee Coulter, Chair of the IEEE Working Group on standards in Intelligent Process Automation to understand how it applies to the consulting, consuming and provider communities.

Rochelle: Please describe the value of the IEEE 2755.1 standard to practitioners in the market. What guidance would you offer on how industry practitioners could leverage the standard in the development of their automation strategy and when evaluating providers in the market?

Lee: Since the beginning of the automation craze starting around 2015, the market has had no standards. When I brought the group together originally in 2016, we wanted to put out a standard that would give the practitioners of IA the ability to not be taken in by marketing hype. IEEE 2755.1 – 2019 is that standard. It represents more than two years of work by all of the major manufacturers to document the features and functions within an IA platform.

The standard was written specifically aimed at people purchasing or using IA/RPA/RDA products to know what they should care about, and how to assess or comparatively assess the different products. The space is becoming more and more crowded with more marketing hype than ever before. This guide gives you the ability analyze and compare products. For every procurement team, IT team, or business user considering automation, USE THIS GUIDE.

It is literally like……purchase a copy from IEEE, open to page 1 and read it. It is a step by step walk through of all aspects of an IA platform from architecture to config/build and orchestration all the way into intelligence services. This is an amazing asset to turn conflated marketing terms into a rigorous assessment methodology.

Rochelle: Many of our members have completed the initial phase of an automation journey having executed a pilot or Proof of Concept. When organizations look to scale their automation how does this standard support leaders as they develop their plans for enterprise scale.

Lee: Whether you are looking to automate or have started your journey, GET A COPY and read it! Do you truly know what the product you have selected has or doesn't have? This will tell you. I recommend that everyone using these technologies have a plan. As usual with technology transformation of work, the technology is the easy part! Over the last year, I have co-authored with SSON two industry reports that go into great detail on the Stall Points and Change Management associated with these programs. I urge anyone who hasn't read them to download a free copy here (http://bit.ly/2lzDv9K and *http://bit.ly/2klg8AA*). Like almost anything in business, without a plan based on a strategy, it is likely doomed from the start. I can't emphasize this enough. Businesses don't implement ERP without a strategy. They don't implement outsourcing or offshoring without a strategy. Let me change that… if you want automation or other major change initiatives to be *successful*, then a strategy is needed. As a leader who is highly engaged in the automation market on all sides (sell, implement, buy, use), I can offer one thing absolutely separates stalled programs from successful programs is a strategy.

This standard plus the IA Global Market reports give a huge leg up to any business entering into automation. The IEEE Working Group is now hard at work on IEEE 2755.2 Implementation and Management Methodologies. This new standard, due out in 2020, outlines best practices for a successful program from start to enterprise scale.

Rochelle: I happen to know you are currently surrounded by hundreds of Monarch butterflies in various stages of development. How does the butterfly metamorphosis parallel an Intelligent Process Automation journey? How does 2755.1 reinforce change management and stakeholder identification as organizations move through these stages?

Lee: My wife and I do raise monarchs every year in the summer and early fall. There is a direct parallel to an automation program. For those that don't know about Monarch butterflies (I really suggest visiting Wikipedia to learn more here https://en.wikipedia.org/wiki/Monarch_butterfly). These fascinating creatures are the only multi-individual lifecycle on earth. It takes five individual butterflies to complete one cycle of life from overwintering in the south to migrating as far

as 4,000 miles, and returning to Mexico for overwintering again. That's right… it takes five individual butterflies that start from one very specific place in Mexico to then fly all the way to Canada and back again.

The analogy to an automation program follows beautifully. Monarchs start as an egg about the size of a large poppyseed. They are born as tiny caterpillars (cat or cats) and will grow 3,000 times that size and go through five "instar" transformations before they are large enough to enter the cocoon and emerge a butterfly.

A successful program will begin as an idea, an idea with a purpose like that egg. When it first hatches, it's like that pilot or POC. From there it needs to be fed just the right stuff to make it to the next phase. Monarchs can only eat milkweed. For automation, that feeding it strategy, building a coalition, and the early makings of a COE. Then, the same as a Monarch, the program will grow. It will stop moving temporarily, shed its skin and prepare to grow again. In an automation program, each of these pauses is equivalent to overcoming a Stall Point such as getting internal audit on board or getting IT on board with the right roles and responsibilities. As the program grows, the cat or COE grows. It will pause as things are beginning to scale and add new roles with new responsibilities. The program will need to be fed with a constant diet of strategy and overcome obstacles that can kill it.

There are five different fatal threats a Monarch caterpillar might face. There is a fly that lays it eggs on a caterpillar, and you won't know about this fatal condition until near the end of the cycle. This is like failing to have a Design Authority in automation. There is an infection called OE that can lead to black death of a cocoon, again, not visible until later. This is like not having a change management plan. There is a wasp that stings a cat in the neck and lays a larva inside. This will only become known after cocoon is hanging up ready to transform (and is a horrible thing to watch). This is like not building the executive sponsorship and the coalition needed for multi-year execution against a strategy.

At every step of the way, a Monarch must avoid fatal threats, and eat a strict diet of leaves from a single kind of plant (milkweed) or it will fail. It is crushing to care for and feed for Monarch cats and see them almost make it, only to succumb to a threat that manifested much earlier that was preventable. Likewise, an automation program faces serious threats. They are known threats, but if not attended to, they can kill the program too. Only when your program is fed properly, goes through about six major transitions can it emerge as a fully-fledged enterprise automation program.