Berkshire Healthcare Intelligent Automation Programme Blueprint.

(V1.4)

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Contents

1. Summary

Intelligent Automation (IA), often referred to as Robotic Process Automation (RPA), is the use of software to replicate tasks traditionally performed by humans. These are not physical robots but sophisticated programs that execute defined processes with speed and accuracy, operating on secure infrastructure within data centres.

In December 2021, Berkshire Healthcare approved its five-year Digital Strategy, which included the launch of a proof-of-concept Intelligent Automation programme. To deliver this, a dedicated start-up team was formed through a combination of fixed-term appointments and secondments from across the organization.

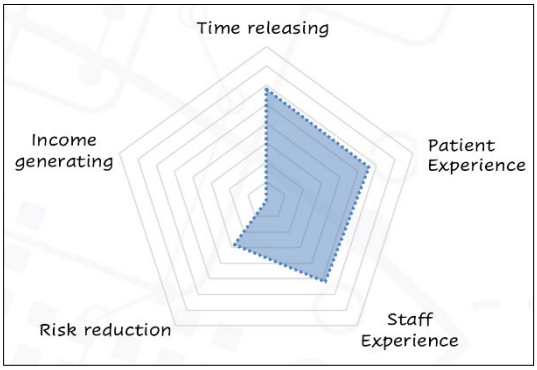
By early 2022, the team had laid the foundations for success by establishing governance frameworks, drafting operating policies, and building the necessary technical infrastructure. During this period, they also developed more than eight proof-of-concept automations and partnered with an external specialist to gain valuable insights into best practices for automation development. higher-value care.

2. Program Scope

Over the past four to five years, our goal has been to build an in-house team capable of identifying high-value automation opportunities, prioritising them in line with the Trust's strategic objectives, delivering solutions in partnership with services, and realising measurable benefits, all underpinned by rigorous analysis of capability, feasibility, and return on investment.

Return on Investment (ROI)

Securing a strong return on investment (ROI) is essential for any organisation implementing an RPA programme, and Berkshire Healthcare is no exception. Demonstrating ROI highlights the tangible benefits of automation, which in healthcare extend beyond financial savings. While cost efficiencies are significant, the greater value lies in freeing staff from repetitive tasks, enabling them to focus on higher value responsibilities and improving job satisfaction.



Introducing automation into busy services is widely seen as positive. Our Business Analytics process provides independent reviews of workflows and visualises pathways, often revealing opportunities for optimisation that were previously overlooked. These insights not only streamline processes but also foster collaboration between services with shared pathways, driving further efficiencies.

From the outset, we rejected an "automate everything" approach in favour of a deliberate, strategic focus on initiatives aligned with organisational priorities. This ensures automation delivers measurable benefits in efficiency, cost-effectiveness, and quality of care. Guided by senior clinical leads, we prioritise opportunities that improve patient and staff experience while releasing time back to services.

The programme also maximises our investment in Microsoft 365, ensuring we fully leverage existing technology to make processes safer, more efficient, and more effective. Additionally, we have

established training and development pathways for developers and analytics staff, supporting recruitment and retention in these critical roles. This proactive approach ensures we remain well-resourced to maintain and scale automations, while mitigating risks from third-party system changes that could otherwise disrupt operations, further strengthening ROI.

3. Minimum Usable Product

The Berkshire Healthcare IA Programme delivers a Minimum Usable Product (MUP), the smallest version of an automated process that provides real value and functionality to the end user. The MUP includes only the essential features needed for the process to operate effectively, avoiding unnecessary complexity. This initial version is deployed quickly to deliver benefits, gather feedback, and guide future enhancements. By focusing on rapid deployment and iterative improvement, this approach accelerates validation while minimising development time and resource use.

4. Project Timeline

Intelligent Automation Programme 5 Year Plan

Our five-year Intelligent Automation journey began with planning in November 2021, progressing from structure to sustainability by 2024–2025. As of January 2024, we are on target and have entered the growth phase.

The programme is ISO 27001, DCB0160, and GDPR compliant, process-led, and supported by robust governance. It operates under agreed DPIA processes, standard operating procedures, and Prince2 Agile project management methods. From the outset, it was designed to be fully transparent and open to internal and external audit and scrutiny.

When designing the programme, we set four annual milestones to guide progress. The first focused on building strong foundations, establishing governance, operational policies, and infrastructure while defining staffing, skills, and licensing requirements to create a capable team.

Next, we accelerated delivery by deepening our understanding of automation opportunities, stress-testing processes, and driving adoption across core services through engagement and targeted communication. Entering the growth phase, we prioritised secure, scalable expansion and continued to strengthen adoption. Finally, sustainability remains our goal, achieved through continuous improvement, robust performance monitoring, and evidence-based practices that deliver high ROI.

This approach ensures automation remains aligned with organisational priorities while embedding shared learning across the health economy.

5. Staffing

From the outset, we recognised the need to introduce roles unfamiliar to Berkshire Healthcare, some requiring external expertise from the automation industry. To manage this effectively, the programme was structured around three workstreams, Designing, Delivering, and Sustaining, with defined roles for each.

Our analysis revealed that several capabilities already existed within teams such as IT Service Desk, Cyber Security, and Infrastructure, as well as within the Power Platform Centre of Excellence. Leveraging these strengths, we engaged early with these teams to align objectives and ensure they had sufficient notice to plan for additional support where needed, including external partners like

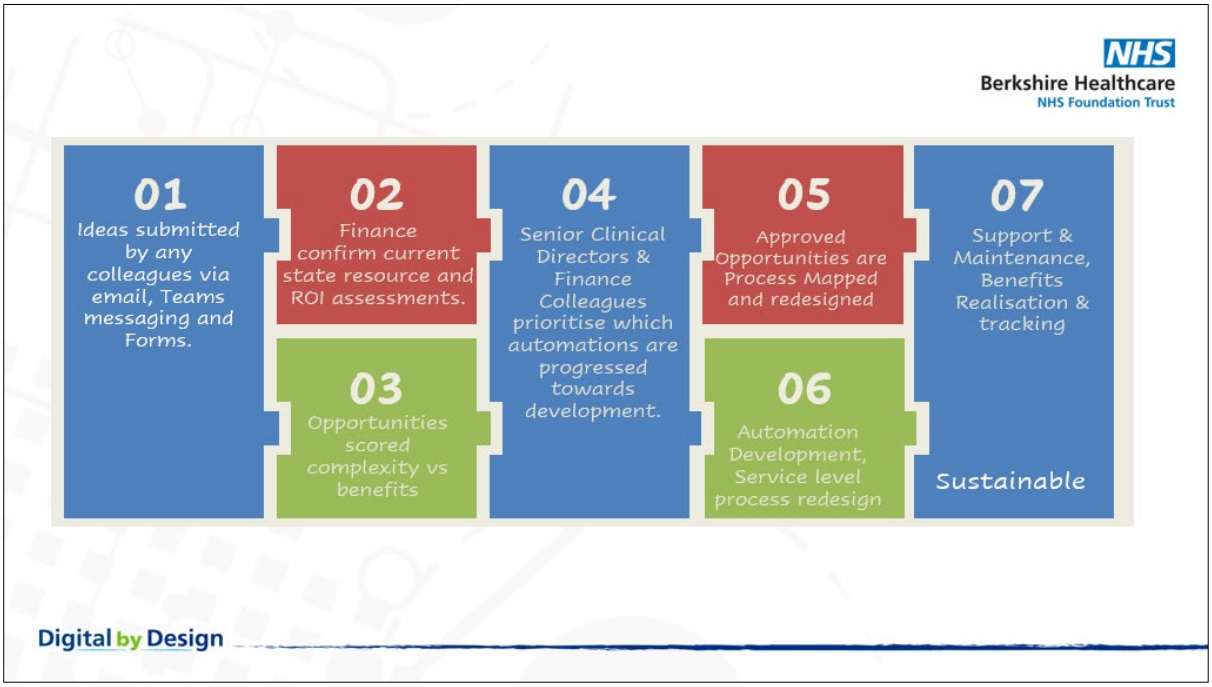
Microsoft.

Given the scale of the programme, some roles were designed to span multiple responsibilities, while others were consolidated to maintain efficiency. This approach allowed us to introduce critical new positions, such as IA Manager, Business Analyst, Governance and Change roles, and development specialists, while ensuring the structure remained agile and sustainable.

Examples of roles we considered.

Designing	Delivering	Sustaining
Project manager Programme manager Business or process analyst Automation architect Integration architect Security architect Software designer or developer	Project manager Programme manager Business or process analyst Automation architect Software designer or developer Delivery manager Quality assurance analyst Change manager Risk manager Governance manager Compliance manager	Performance analyst Resource manager Robot farm manager Robot controller Robot administrator Infrastructure manager Service manager (support and helpdesk) Risk manager Governance manager Compliance manager

Job Roles and the delivery cycle



Long term Staffing Levels

Over time, around 10% of Intelligent Automation delivery capacity will be dedicated to maintaining existing automations. Without additional resources, this could limit the ability to deliver new solutions. In the early years, despite maintenance demands, we expect efficiency gains as experience grows, enabling greater productivity with the same staffing levels and ensuring continuous programme delivery.

Currently, most automation failures stem from changes in third-party systems, though the automations themselves remain resilient. As we increasingly adopt API integrations to bypass user interfaces, we anticipate further reductions in downtime and improved stability.

6. Technology

Berkshire Healthcare identifies as a Microsoft-centric organisation, relying on Microsoft products for our standard business operations. While we also extensively utilise our own Microsoft Power Platform tenant, a critical assessment of prominent Automation/RPA technology providers was essential to enhance and fine-tune our automation strategy.

For Berkshire Healthcare, Microsoft stood out prominently amidst competitors and for us, were the best choice.

The integration of the Microsoft Power Platform with various Microsoft services enhances automation efficiency by combining processes seamlessly. Microsoft's comprehensive ecosystem, inclusive of tools like Power BI, Azure, and Dataverse, empowers the deployment of automation solutions addressing diverse needs with coherence.

The platform's robust security measures and compliance standards, crucial in the healthcare sector, provide assurance of safeguarding sensitive data. Azure's scalability ensures the automation infrastructure can expand with evolving organisational requirements. Microsoft's commitment to innovation keeps automation capabilities cutting-edge and future-proof.

In evaluating options like UiPath, Automation Anywhere, and Blue Prism, we considered factors such as cost, ease of use, community support, scalability, and integration capabilities. However, the choice of Microsoft aligns with our existing infrastructure, encourages user adoption, and provides a secure, scalable, and integrated solution for Berkshire Healthcare's automation efforts.

Within the Microsoft Power Platform, our citizen developer program also supports us in advancing enterprise automation. This initiative taps into the skills of employees, enabling non-technical individuals to create customised solutions, fostering innovation and collaboration. The Power Platform fully enables solution development, allowing citizen developers familiar with departmental processes to swiftly identify and implement opportunities, reducing reliance on traditional IT teams.

Effective governance is crucial within the Microsoft Power Platform for a successful citizen developer program. Guidelines, training, and the centralised platform within the Power Platform ecosystem ensure security, compliance, and high-quality solutions.

In summary, the Microsoft Power Platform, our Enterprise, and citizen developer program significantly contributes to the enduring success of enterprise automation at Berkshire Healthcare.

7. Infrastructure

Berkshire Healthcare have access to their own Azure infrastructure and Power Platform tenant. Using these services, we have access to:

Dataverse	A secure cloud-based storage for us to manage our data securely, making it easily accessible for different applications.
Power BI	A tool that visualises data, making dashboards, helping us to understand and make decisions based on colourful charts and graphs.
Power Automate	A software development tools that allows developers to build robots that automate repetitive tasks and more.
Power Apps	An easy-to-use platform that lets you create software applications without coding skills.
Key Vault	Is a secure vault for digital keys, passwords, and secrets, ensuring our sensitive information is well-protected.
Centre of Excellence (CoE)	A package of governance applications, focused on the Power Platform that ensures best practices and helps others in Berkshire Healthcare make the most of Microsoft's powerful tools.
Virtual machines (VMs) within the Microsoft 365 and Azure environment	These are virtual computers running in the cloud, providing a flexible and scalable way to support and manage our robots, without the physical hardware.

Azure Virtual Machines (VMs)

We use Azure Virtual Machines (VMs) for their flexibility and reliability, providing a strong foundation for automation. Azure VMs enable rapid deployment of both VMs and robots, with scalability that allows dynamic resource adjustments to manage varying workloads. This optimises costs while ensuring responsiveness during peak demand.
Each VM hosts one or more robots with distinct runtimes, and as of January 2024, we operate 20 VMs. Security is reinforced through Azure Key Vault, which securely stores credentials, certificates, and keys, ensuring confidentiality and controlled access for RPA processes.
The Azure Centre of Excellence (CoE) underpins our programme with governance, best practices, and resource optimisation, while Key Vault integrates seamlessly into workflows to protect sensitive data. Together, these capabilities create a secure, scalable, and resilient automation environment.

8. Governance and Compliance

Robotic Process Automation (RPA) operates within Berkshire Healthcare’s Digital Services

framework, ensuring alignment with security, governance, and assurance standards. Compliance with ISO 27001, Cyber Essentials Plus, NHS data security requirements, and clinical safety standards is fundamental.

Our project and process design methodologies, PRINCE2, Agile, and Lean Six Sigma, provide structured frameworks for efficient delivery. From inception, the Intelligent Automation programme was built to meet ISO 27001, DCB0160, and GDPR standards, ensuring information security, clinical safety, and strong governance.

ISO 27001 compliance establishes a secure foundation for managing information while driving continual improvement and effective risk management through regular audits. Certification builds confidence among stakeholders, partners, and patients, reinforcing the long-term success of our RPA initiatives. We also align with NHS Digital Standards, Clinical Safety Standards, the IG Toolkit, and NICE guidelines.

This comprehensive approach has created a robust framework that meets the unique regulatory, security, and quality requirements of the NHS.

Secure Development Lifecycle

Our Secure Development Lifecycle (SDL) underpins security and governance across the programme. Compliance for Microsoft Power Platform applications is maintained through regular audits, peer and code reviews, with documented outcomes and timely remediation.

Berkshire Healthcare delivers security training to all personnel involved in Power Platform development, covering secure coding practices, threat awareness, and adherence to established standards.

In the event of a security or data breach, the Information Governance, IT Security, and senior IA and IM&T teams are immediately notified to ensure rapid response and reporting.

Environment Management and Control

We operate 3 separate environments.

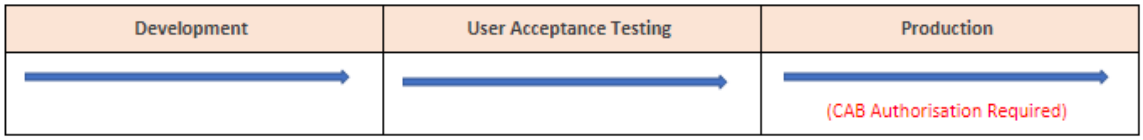
- Development
- User Testing
- Production.

The production environment is the most secure, with access strictly limited and controlled, developers for example do not have access onto Production environments. Applications are moved from the UAT environment into the production environment using a transportation application, managed by non-technical staff.

Environment Movement Control

No movement of any application, located within either the User Acceptance Testing or Production environments can occur without approval via change.

Application movement is one way.



We restrict developer access to production environments to maintain security, stability, and effective risk management. Limiting access reduces the risk of unauthorised entry or accidental exposure of sensitive data, ensuring compliance with privacy regulations. It also protects system stability, as unrestricted access could compromise critical operations during testing or feature deployment.

Controlled access mitigates the likelihood of errors or malicious actions, supports structured change management, and ensures all modifications align with business and security standards. This approach strengthens compliance, simplifies audits, and maintains clear accountability. It also reduces vulnerability to cyber threats, safeguards performance, and ensures operational continuity. Restricting developer access is a best practice that upholds Berkshire Healthcare's principles of security, stability, and reliability.

Policies

Our programme is heavily governed, with policies covering four distinct categories. ISO 27001:2022, Standard Operating Policies, Associated Policies and Gateway Policies.

ISO 27001:2022 Policies	Standard Operating Policies
• Access to Source Code • 3rd Party Access Control • Security Testing • Application Security • 3rd Party Development • Secure Development Lifecycle • Change Management • Intellectual Property Policy • Secure Coding • Environment Separation and Security • Privacy and Protection of Personal Data • Test Data Management	• Azure Key Vault • DPIA Decision Tree • Process Mapping • Staff Training • Break Fox Prioritisation • End of Life Management • Postproduction Review and Audit • Training Developments • Change Freeze • Peer Review • Reusable Components • Application Programming Interfaces • Development Standards • Programme Data Retention • RIO Synchronisation • Using Artificial Intelligence
Associated Policies	**Gateway Policies**
• IA Governance Statement • Client Responsibilities • Client Handover Document • Change Workshop • Gateway Management • Risk Register • Peer Review Questioner • Postproduction Review and Audit... • Discovery Workshops • Run Book	• Agreement to Proceed • Risk Assessment • Statement of Work • Testing Pun

9. Security and Access Controls

3rd Party Providers

If a third-party provider encounters an issue or security breach while working for Berkshire Healthcare, they must report it immediately to the IA team. When remote access to local systems is used, the provider must notify a Berkshire Healthcare contact once work is complete.

The IA team ensures remote access is secure, systems are protected after work, and any temporary support accounts are disabled. Only Berkshire Healthcare-issued hardware can connect to BHFT networks and the Microsoft 365 tenant.

All third-party accounts must comply with the Berkshire Healthcare Account Policy and IM&T IT Security Policies, ensuring security, accountability, and compliance always.

Application Security

When designing and building new automations, security is embedded from the start. The Statement of Work outlines measures to protect information, and security discussions are held with third-party providers. During development, rigorous testing identifies and resolves vulnerabilities, ensuring compliance with our security standards.

Before implementation, approval is documented through an Agreement to Proceed. To maintain expertise, our team receives training on Microsoft Power Platform development, secure practices, threat awareness, and compliance requirements.

If a security incident occurs, the Information Governance, IT Security, and senior IA and IM&T teams are notified immediately to enable a rapid response and resolution.

Credentials Security

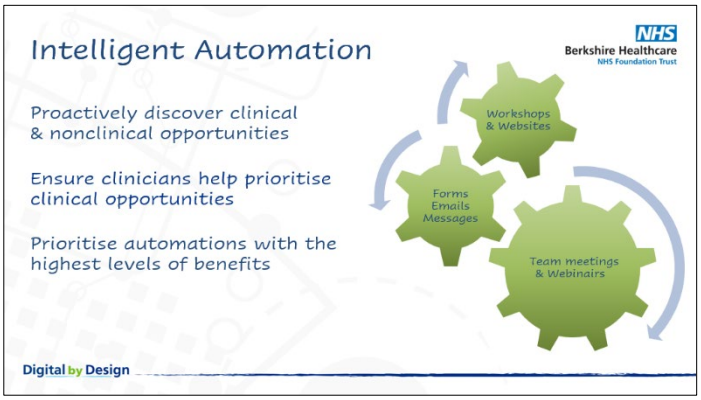
Azure KeyVault is integral to our Intelligent Automation (IA) program, ensuring the security of vital information and compliance with digital operations standards. KeyVault helps us safeguard sensitive data and passwords, adhering to data security regulations, and mitigating risks associated with secret codes and keys for all individuals involved in the Power Platform.

Rules mandates the use of Azure KeyVault in all IA and RPA solutions to, preventing the direct storage of sensitive data in programs. Azure KeyVault’ s granular access control is integrated into solutions by IA/RPA developers, supervised by program managers to ensure policy implementation and adherence across all IA and RPA projects.

10. Process Identification and Prioritisation

Process Identification

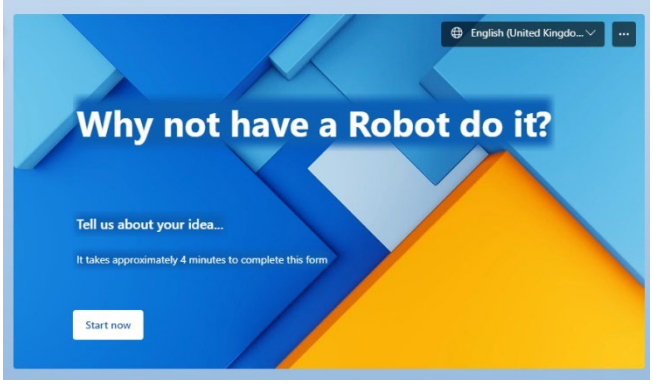
In our approach to socialisation, we've implemented an intensive marketing program. This encompasses comprehensive coverage on the intranet, webinars, inclusion in Trust-wide briefing papers, and active participation in as many clinical team meetings and workshops as we can secure a seat.



Securing the support of the Trust Business and Clinical Leadership is pivotal, and we take every opportunity to present to the Executive, Board members, non-executive members, and Governors. We focus particularly on senior Clinical team leaders, Clinical Directors, and Heads of Services.

Recognising that 'Unicorn' (High benefit, Low complexity) opportunities won't simply present themselves, we've adopted a proactive strategy. To uncover substantial time savings, exceeding 3000 hours per year of time returned for each automation, we actively seek them out. This led us to integrate a Clinician into the team, tasked with helping us in identifying these 'High Value' opportunities.

In addition to this proactive approach, we've established an inclusive channel for idea submission. Anyone can contribute suggestions via forms, which are seamlessly integrated into our Task Manager, 'Asana.' This ensures a streamlined process for idea submission and consideration.

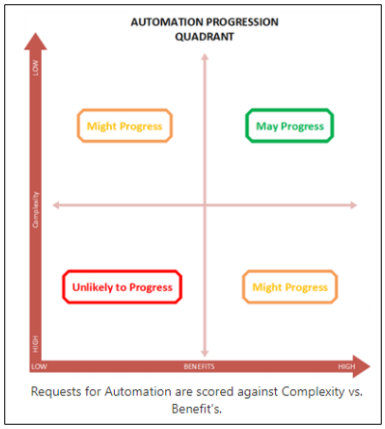


We've also made a deliberate choice – our focus isn't solely on high-value opportunities though. We leave room for introducing automations into services facing challenges, such as staffing issues. Deploying a robot into a service that's grappling with difficulties becomes a positive local news story, showcasing the Trust's commitment to offering support where it's needed.

Up until now, every introduction of our robots has been met with enthusiasm and genuine excitement. It's essential not to exclusively concentrate on 'High Value' opportunities, as each deployment, regardless of scale, contributes to the broader success of our automation initiatives.

Prioritisation

We don't accept submitted opportunities at face value. In every case, we conduct a thorough analysis and scoring process based on the information provided by the submitter.



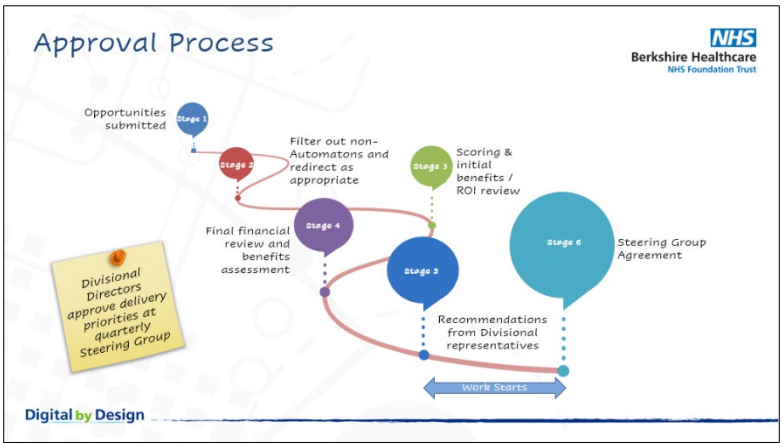
Requests for Automation are scored against Complexity vs. Benefit's.

Each opportunity goes through a scoring system where benefits, Trust Priorities and Clinical Priorities directly influence the score.

Those with low complexity but significant benefits are classified as high-value opportunities and are scored accordingly.

Approval Process

There are 4 stages before we start analytics and development work (Stage 5 onwards)



After establishing the initial score and priority, (Stage 3) we delve even deeper into the top-scoring opportunities. This involves collaboration with our business analytics and Finance teams (Stage 4) to conduct a thorough 'discovery' session with the submitting service.

During this stage, we ensure the accuracy of the submitted details, seeking confirmation from the senior team of the submitting service regarding their agreement to host and collaborate with an automation. We also verify their understanding of ownership responsibilities, readiness for the impending change and transformation efforts, and their commitment to releasing appropriate staff during the design and build sprints.

Our finance teams assess the potential for recovered hours and collaborate with us in conducting an initial return on investment review. If, at this early stage, we encounter challenges in obtaining the necessary assurances or signatures, or if concerns are raised by our Finance teams, we make the decision to descope the opportunity.

Moving to stage 5, we engage in discussions with the most senior Clinical leaders. During this phase, we share the identified opportunities, allowing them to leverage their local knowledge to reassess priorities. Finally, at stage 6, we secure agreement to proceed in a formal meeting, marking the end of the approval process.

11. The Delivery Process

We consistently strive to deliver a minimal viable product, actively working to decrease our sprint times. This encompasses both business analytics and the robotic development aspects of the program.

The end-to-end process of delivering an automation into production can take up to 4 months* and is broken down into 5 steps.

* As we learn and become more experienced, we expect this to reduce significantly.

The idea submission process involves the Business Analyst team meeting with the process owner to gather details about the process and system information.

Opportunities are then scored based on the complexity of the build and the perceived benefits, prioritising high-value opportunities with low complexity and high benefits for a successful Return on Investment (ROI). High-level process maps provide a quick overview, while detailed maps offer a more in-depth understanding of subprocesses and decision points.

Development sprints involve building the solution as per agreed-upon requirements, with testing conducted by the developer alongside the Process Owner, Business Analyst team, and Intelligent Automation Managers.

In development sprints, the automation solution is tested and evaluated with subject matter experts and process owners, addressing, and retesting any discovered problems until all parties agree on progression to production.

12. Break / Fix Support and Maintenance

At Berkshire Healthcare, automation break/fix issues are treated as urgent rather than critical, making Priority 1 (P1) failures rare. Services using automations receive support through change workshops to develop business continuity plans, ensuring readiness for any failure.

If an automation fails, the immediate action is to report it to the IT Service Desk and activate the continuity plan.
To allocate resources effectively, fixes are prioritised by clinical impact, financial value, scale, and user dependency. Automations affecting patient care, such as referrals or medication processes, or those delivering significant time and cost savings, take precedence. High-volume automations and those essential to daily operations are also prioritised.

Standard break/fix timelines vary: onboarding automations are low priority with an eight-week resolution, procurement card processes medium at six weeks, and referral workflows high priority at four weeks. P1 failures are rare but clearly defined, they occur when four or more robots fail concurrently, two or more fail from the same cause (e.g., Power Platform fault), or a single robot remains offline for around four weeks. These criteria ensure critical issues receive immediate attention while maintaining a structured response for standard incidents.

When a P1 issue is raised, it takes precedence over all other IA work. The IA Manager is responsible for resolution and Service Desk updates, while the BA Manager manages client communications. The Head of Service receives daily updates until the issue is resolved.

13. Continuous Improvement

We support a programme of continuous improvement; this process covers several key areas.

Peer review

Within the Berkshire Healthcare IA Programme, peer reviewers evaluate the design, logic, and code of automated processes to ensure quality, accuracy, and efficiency. Typically, experienced automation developers, they provide constructive feedback, identify improvements, and maintain the integrity of solutions, ensuring they meet organisational standards and objectives.

Peer reviews occur at key project milestones during planning and development and must be completed before implementation. Reviewers submit detailed reports outlining strengths, weaknesses, and recommendations, which the project team uses to refine solutions. Confidentiality and professionalism are essential, with reviewers expected to maintain discretion and deliver objective feedback.

The IA Manager oversees the implementation of recommendations and may request follow-up reviews to confirm effectiveness. All reports are securely stored for audit purposes, reinforcing accountability and continuous improvement. This collaborative process ensures solutions are robust, efficient, and aligned with organisational goals.

Feedback

We engage stakeholders from the outset, securing their commitment to regular meetings during and after production. This ensures valuable feedback on automation performance, user experience, and any challenges, forming the basis for informed improvements.

Collaboration continues throughout the automation's lifecycle, with monthly meetings in the first quarter post-launch, transitioning to quarterly sessions. This sustained dialogue fosters adaptability and responsiveness to evolving needs, ensuring long-term success.

Training and Skill Development

At Berkshire Healthcare, all staff complete annual appraisals, objective setting, and regular one-to-one meetings. Our mission is to maximise independence and quality of life, supporting people to live fully within their circumstances. Our vision is to be an outstanding organisation that delivers excellent care and fosters a positive work environment, guided by values of compassion, quality, safety, and collaborative innovation.

Funding for specialist automation training is allocated directly to the team, with members encouraged to pursue role-specific learning and certification. Business Analysts, Project Managers, and Developers are expected to complete training to certification level, supported by a comprehensive IA Robotics Programme offering structured development pathways.

Training is delivered through flexible formats, including self-directed, modular, in-person, virtual, and e-learning options. Certification demonstrates compliance with training standards, and additional support is provided where needed. If training requirements cannot be met, role suitability may be reviewed to maintain programme quality and capability.

Benchmarking

We actively network across the NHS, sharing insights and learning from organisations at every stage of their automation journey, from early adopters to advanced programmes. We also draw lessons from commercial automation providers and private sector organisations running mature programmes.

Microsoft Assessments play a key role in benchmarking and guiding improvement. Conducted at programme inception and periodically thereafter, these assessments evaluate processes, infrastructure, and strategy, shaping our approach to Power Platform adoption. Our latest assessment rated us 'Efficient' with an overall score of 74%.

Beyond evaluation, these assessments drive learning, improvement, and risk mitigation by identifying challenges early and enabling proactive solutions. They support seamless integration of Power Platform tools, fostering efficiency, innovation, and a culture of continuous improvement. As a dynamic tool for progress, Microsoft Assessments remain central to our strategy, ensuring sustained performance and long-term success.

14. Communication Plan

Our communication plan ensures transparent, effective engagement with internal and external users and stakeholders throughout implementation and into sustainability. Its purpose is to keep all parties informed, aligned, and aware of programme benefits.

We launched with a comprehensive team kick-off meeting to introduce the RPA programme, outline objectives, and define roles. Regular updates followed to share progress, challenges, and milestones, fostering open dialogue and feedback. Externally, we maintain engagement through stakeholder briefings, user notifications, and feedback mechanisms to capture insights and improve delivery.

Stakeholder collaboration remains central, supported by regular meetings, workshops, and progress reports highlighting milestones and impact on organisational efficiency. Using channels such as the Berkshire Healthcare intranet, newsletters, and websites, we share success stories, key achievements, and upcoming events, ensuring visibility and continued engagement across the Trust.

15. Monitoring and Reporting

Postproduction reviews

Post-production reviews and audits are a priority within the Intelligent Automation programme, ensuring quality, reliability, compliance, and continuous improvement. These reviews begin with daily audits for the first 10 working days, followed by monthly sessions for four months, and then quarterly reviews as an ongoing practice.

Meetings, often held via Teams, include IA Managers, Process Owners, and Subject Matter Experts, focusing on performance, issues, and any required changes. Comprehensive documentation of findings, recommendations, and actions ensures transparency and accountability throughout the automation lifecycle.

Testing Reports

The testing process requires high-level test reports as part of the documentation, including a clear summary table of scenarios such as exception handling and audit table entries. These reports can be embedded in the Testing Plan or stored separately in the sprint Teams Information Governance & ISO folder, with links provided for easy access.

In line with ISO standards, each environment requires its own Testing Plan and Report. While documents may share similarities, they cannot be direct copies, as new testing must be demonstrated for every environment to ensure full coverage and compliance.

Exception Reporting

Regular email updates provide a clear overview of tasks completed by the robot and those requiring manual intervention. Any robot failures trigger immediate exception reports to the IA team for investigation.

Significant failures may require a switch to manual processing under the service's Business Continuity Plans, which remain outside the IA team's control. Responsibility for ensuring staff are trained to manage such scenarios lies with the Process Owner, ensuring readiness when automated processes encounter issues.

16. Current Position (September 2025)

Since early 2022, the team has delivered over 30 automations, transforming key processes across the organisation, from appointment management to staff supervision, equipment ordering, and discharge processing. These solutions have streamlined operations, reduced administrative workload, and improved service delivery.

The Intelligent Automation team comprises 12 specialists in Business Analytics and Automation Development, including experts from the commercial sector whose experience has strengthened capability and accelerated progress. By April 2025, we will have released more than 47,000 hours back to the Trust, time reinvested in patient care.

Our focus has shifted from isolated opportunities to large scale, organisation wide transformations. The first is an ambitious initiative to automate approximately 350,000 referrals annually, eliminating duplicate data entry into EPR systems and improving the referrer experience. This will make referrals faster, simpler, and smarter, enhancing patient care, reducing complexity, and improving data quality. Built on Microsoft Power Platform and fully compliant with UK and EU accessibility standards, the solution is mobile first, user-friendly, and supported by dedicated post-launch assistance.

This programme is about more than automation; it is about reimagining processes to deliver measurable impact. By reducing referral processing times from 20 minutes to under a minute, enabling real time 24/7 automation, and maintaining clinical integrity through intelligent workflows, we are setting a new benchmark for efficiency and quality.

Looking ahead, we are assessing further opportunities for organisation wide automation. Priorities include automating up to 60% of administrative tasks, streamlining wider team functions, and improving patient engagement through automated notifications to reduce DNAs, manage follow ups, and cut waiting lists. We are also exploring ways to reduce call volumes by automating common queries such as prescription requests and personal information updates. These initiatives have the potential to enhance accessibility, improve satisfaction, and free staff for.