RPA Capability Roadmap

12-Month Director Pack: establishing a scalable, sustainable and internally owned RPA capability for Oldham Council

Purpose

This roadmap sets out a practical plan for introducing Robotic Process Automation into a council environment from a standing start. The intention is not to deliver a small number of disconnected bots, but to establish a repeatable automation function that can identify opportunities, build production-grade automations, document and govern them properly, and train internal staff so the capability remains inside the council. The plan is deliberately realistic, targeting **8-16 live automations in year one** while building reusable technical assets and internal knowledge.

8-16	Reusable	Internal	Governed	Supportable	Clear
live automations	component libraries	staff trained	automation pipeline	production estate	year-two roadmap

Commercial positioning

This should be treated as a capability build and delivery programme, not just development resource. The value is in building the operating model, standards, component libraries, training pathway and live automations together.

Core principle

Build internal capability and reduce reliance on external consulting firms by transferring knowledge, documentation and reusable assets into the council.

1. Executive Summary

What the programme delivers and why the approach is structured this way

RPA is most successful in councils when it is implemented as an operational capability rather than a technology experiment. Many council processes still rely on repeatable manual administration: reading emails, validating forms, moving data between systems, updating records, producing reports, routing exceptions and checking case information. These tasks consume significant staff time and create avoidable backlogs, delays and inconsistency.

The proposed 12-month roadmap creates early delivery while building the foundations required for safe scale. It starts with service workshops and infrastructure, then moves through standardised delivery, component library creation, internal training, governance, production monitoring and knowledge transfer. This gives directors visible early value while avoiding the long-term risk of fragile automations that only an external supplier can maintain.

The target of 8-16 live automations is intentionally realistic. It allows enough time for proper discovery, documentation, risk assessment, UAT, deployment, stakeholder engagement and training. The aim is to underpromise and overdeliver, with every automation built to a standard that can be supported and extended.

Quarter	Programme focus	Expected cumulative outcome
Q1	Foundation: workshops with key service areas, VM/machine template setup, access model, documentation standards, first component libraries, first 1-2 processes identified and deployed.	RPA environment live, delivery standards agreed, first automations deployed, first pipeline of opportunities created.
Q2	Scale: 2-4 additional automations, reusable libraries for key systems, queue-based design, monitoring reports, deployment checklists and consistent documentation.	3-6 automations live, repeatable delivery model in place, components reducing future build time.
Q3	Embed: additional service areas engaged, 3-5 more automations, internal staff training, pipeline governance and code review practices.	6-11 automations live, internal staff contributing, RPA recognised as a council-wide capability.
Q4	Optimise: final 2-5 automations, performance review, knowledge transfer, support model, handover and future roadmap.	8-16 automations live, sustainable capability established, reduced dependency on external resource.

2. Operating Model and Delivery Principles

How the RPA function should be built so it scales safely

The operating model should be lightweight but disciplined. It should make it easy for services to suggest opportunities, while ensuring only suitable processes are selected for automation. This prevents RPA from becoming a queue of random requests and helps directors see what value is being delivered.

1. Discover and assess

Run workshops, capture volumes, current handling times, systems used, exception rates, data quality issues and service impact. Score opportunities by value, feasibility, risk and complexity.

2. Design and govern

Produce PDD, SDD, risk assessment, process overview and support approach before build. Confirm business ownership, success measures and UAT route.

3. Build and deploy

Use reusable components, standard exception handling, logging, queues where appropriate, clear deployment checklists and documented handover.

4. Monitor and improve

Track success rates, exceptions, manual referrals, estimated hours saved and system issues. Use reporting to improve automations and evidence benefits.

5. Train internal staff

Move staff from shadowing to active contribution through real process discovery, testing, support, component development and pair building.

6. Transfer capability

By the end of year one, hand over documentation, component libraries, support knowledge, standards and the year-two backlog.

Decision area	Recommended principle	Director-level value
Process selection	Prioritise high-volume, stable, rules-based and measurable processes. Avoid automating broken or unstable processes too early.	Improves ROI and prevents resources being spent on poor candidates.
Documentation	Make PDD, SDD, risk assessment, process overview and handover documents mandatory from the first build.	Creates auditability, reduces support risk and protects the council from knowledge loss.
Reusability	Build libraries for common actions and key council systems rather than rebuilding the same logic repeatedly.	Reduces future delivery cost and increases reliability.
Internal ownership	Train internal staff alongside delivery rather than waiting until the end.	Reduces consultancy dependency and creates a council-owned capability.
Benefits tracking	Capture baseline manual effort and report realistic time savings.	Gives directors evidence for future investment decisions.

3. Component Library Strategy

Reusable technical assets for key council systems

Component libraries are one of the most important parts of scaling RPA. Without them, every automation starts from scratch and repeatedly solves the same problems: logging in, searching records, navigating screens, adding notes, handling pop-ups, reading emails, writing reports and dealing with exceptions. A library-based approach creates reusable building blocks that reduce development time and improve consistency.

The council should start with generic components in Phase 1, then mature into system-specific libraries during Phases 2 and 3. Libraries should be version controlled, documented and treated as production assets. This is especially important for key systems that multiple automations are likely to use.

Library area	Example components	Benefit
Core automation framework	Config handling, credential retrieval, standard logging, exception screenshots, email notifications, retry handling, folder creation, file archiving.	Creates consistency across every automation and reduces basic setup time.
Email and forms processing	Mailbox reading, attachment saving, duplicate checks, subject/body parsing, routing rules, acknowledgement emails and exception emails.	Useful across many council teams where work arrives through shared mailboxes and forms.
Excel and reporting	Read/write data tables, clean CSVs, validate columns, generate status reports, produce summary tables and attach outputs.	Supports reporting, reconciliation, status updates and operational MI.
Key council systems	Login, search person/account, open record, update details, add note, upload document, retrieve reference, controlled logout.	Speeds up future builds and reduces selector duplication.
Queue and transaction handling	Dispatcher/Performer structure, add queue item, process queue item, business exception, system exception, retry rules, final status reporting.	Supports scale, auditability and reliable unattended processing.

Important: component libraries should not be allowed to grow informally. Each component needs a clear purpose, input/output arguments, exception behaviour, version history and usage guidance. This keeps the library useful rather than becoming another unsupported dependency.

4. Delivery Accelerators and Operational Enhancements

Pre-built assets that improve speed, reliability and visibility from day one

In addition to the core component library strategy, a set of pre-developed accelerators and operational enhancements are available. These have been developed through real-world delivery in local government environments and are designed to reduce build time, improve quality, strengthen reporting and make automations easier for services to understand and support.

Accelerator	How it is used	Value to Oldham Council
ROI tracking and Power BI-ready outputs	Template files are already available for tracking ROI and benefits on a weekly basis for live processes. The data can be structured so it can feed into reporting software such as Power BI.	Provides directors with evidence of value, supports future investment decisions and avoids benefits tracking becoming an afterthought.
Reusable utility XAMLs	A library of useful XAMLs is already available, including DataTable to HTML conversion for email bodies, Excel formatting, personalised greetings, password generators and transaction summaries.	Reduces development time, improves consistency and avoids rebuilding common utilities for every automation.
End-user friendly status reports	Every process will include a clear status report designed with stakeholders. Reports include service-agreed columns plus four standard fields at the end: Status, Description, Date and Time.	Gives services a readable operational output showing what happened, what needs action and when each transaction was processed.
Local government REFramework template	A ready-to-go REFramework template is available, customised for local government delivery with exception handling, structured logging and status report outputs built in.	Creates a consistent production standard from the first build and makes future processes easier to support, review and hand over.
Automated credential resilience	Processes can include automatic password generation and reset routines to reduce the risk of failure when robot credentials expire.	Improves resilience, reduces avoidable downtime and lowers reliance on manual intervention from support teams.
Insight processes for larger automations	High-volume processes can have monthly, quarterly and yearly insight runs that compile status report data into summary outputs for easier transaction tracking and reporting.	Turns operational outputs into meaningful management information and can feed reporting tools such as Power BI.
Custom HTML communication templates	Dispatcher, performer and exception emails will use tailored HTML bodies for each process, with clear formatting, stakeholder-specific language and consistent branding.	Improves stakeholder confidence, makes outputs easier to act on and gives every automation a polished, professional communication route.

These accelerators mean the programme is not starting from a blank page. The council benefits from proven delivery assets, reusable technical patterns and reporting structures that can be adopted immediately and refined to match Oldham Council standards.

Phase 1: Months 1-3 - Foundation, Discovery and Initial Delivery

Stand up the RPA function, agree the delivery model, set up infrastructure, create structured documentation, begin component libraries and deploy the first 1-2 automations.

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Workstream	Detailed activity	Why this matters
Service workshops	Run workshops with priority areas such as Adult Social Care, Finance, Revenues and Benefits, Housing, HR and customer services. Capture volumes, handling times, pain points, systems, data quality, exceptions and SLAs.	Creates a clear evidence base and prevents automation effort being spent on low-value or unsuitable processes.
Opportunity pipeline	Score candidate processes by value, complexity, risk, data quality, stability, manual effort and service impact. Produce an initial prioritised backlog.	Gives leadership a transparent view of where RPA can deliver value and what should be tackled first.
Infrastructure setup	Set up UiPath tenant/folder structure, unattended robot, machine template, VM, robot account, credentials, access to systems, package feeds and deployment route.	Prevents infrastructure and access issues delaying delivery once demand grows.
Structured documentation	Create templates for PDD, SDD, handover documents, process overview documents, risk assessments, UAT evidence, support runbooks and deployment checklists.	Builds auditability and supportability from day one rather than trying to retrofit governance later.
Development standards	Define logging, exception handling, queue usage, naming conventions, config structure, credential handling, email standards and production support expectations. Use the local-government REFramework template where suitable.	Ensures automations are built consistently and can be maintained by others.
Initial delivery	Select 1-2 low-risk, high-value processes and deploy them into production with documented support routes, stakeholder-friendly status reports and measurable outputs.	Creates early confidence and proves the council can move from concept to live delivery.

Key deliverables

- RPA operating model and intake route
- VM/machine template and unattended robot ready
- Documentation pack: PDD, SDD, process overview, risk assessment, handover and runbook
- Initial component library foundations
- 1-2 live automations and first benefits reporting

Internal training focus

Internal staff should shadow workshops, documentation and the first builds. The focus is on understanding what makes a good automation candidate, how a process is documented, how risks are identified, how UAT works and how production jobs are monitored.

Expected phase outcomes

- RPA environment is live and ready to scale
- First automations deployed with clear ownership
- Initial pipeline of opportunities created
- Directors have visible proof that RPA can work in the council
- Documentation and risk controls embedded from the beginning

Phase 2: Months 4-6 - Scale Delivery and Standardisation

Move from early proof points into repeatable delivery by expanding automations, building system-specific components and introducing stronger reporting and support controls.

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Workstream	Detailed activity	Why this matters
Delivery expansion	Deliver 2-4 additional automations from the prioritised backlog, using a mix of quick wins and slightly more complex processes.	Builds momentum and demonstrates that RPA is not limited to one team or one process type.
System libraries	Expand component libraries for key systems, including login, search, open record, update record, add note, upload document, retrieve reference and controlled logout.	Reduces build time for future automations and improves resilience when the same systems are reused.
Queue-based processing	Introduce Dispatcher/Performer patterns, transaction references, business exceptions, system exceptions, retries and structured queue reporting where appropriate.	Creates scalable unattended processing and improves auditability.
Reporting and MI	Implement daily or weekly status reports showing transactions processed, successes, exceptions, manual referrals and estimated hours saved. Outputs should align to ROI templates and Power BI-ready datasets.	Gives service owners and directors evidence of value and visibility of issues.
Testing and deployment	Formalise peer review, UAT scripts, defect tracking, deployment checklists, production readiness checks and go-live sign-off.	Reduces production risk and increases confidence from IT and service owners.
Support model	Define who monitors jobs, who owns exceptions, how failed cases are rerun, how service changes are raised, password reset approach and how incidents are escalated.	Prevents automations becoming unsupported once live.

Key deliverables

- 2-4 additional automations live
- Expanded component libraries for priority systems
- Queue-based framework used where appropriate
- Performance reporting model in place
- Deployment and support checklists embedded

Internal training focus

Internal staff should move from observing to contributing. Suitable activities include PDD drafting, process mapping, UAT support, exception review, log review, small component updates and support documentation. This begins the shift from external delivery to internal capability.

Expected phase outcomes

- Cumulative total reaches approximately 3-6 live automations
- Delivery becomes repeatable rather than one-off
- Reusable assets begin reducing future build effort
- Service owners see clear reporting and exception information
- Internal staff start contributing to delivery activities

Phase 3: Months 7-9 - Embed Across Services and Build Internal Capability

Expand RPA across the council, formalise the pipeline, increase internal contribution and introduce stronger quality controls across the live estate.

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Workstream	Detailed activity	Why this matters
Service expansion	Engage additional services such as Housing, HR, environmental services, customer services or corporate support functions. Use live case studies to explain what RPA can and cannot do.	Creates wider adoption and builds a council-wide pipeline rather than isolated departmental use.
Advanced delivery	Deliver 3-5 further automations, potentially including structured document handling, multi-system updates, exception routing or more complex validation.	Shows that the capability can handle more than simple quick wins while staying controlled.
Pipeline governance	Create a visible backlog with business owner, stage, expected benefit, complexity, risk, dependencies and proposed delivery quarter.	Gives directors transparency and makes prioritisation easier.
Training pathway	Build a structured pathway covering discovery, PDD writing, solution design, UiPath basics, Orchestrator, debugging, testing and support.	Turns training into an organised capability plan rather than ad hoc shadowing.
Quality assurance	Introduce code reviews, design reviews, reusable component checks, standards compliance and go-live readiness checks.	Protects quality as more people contribute to delivery.
Operational embedding	Agree how services receive status reports and exception outputs, how manual checks are routed, how changes are requested and how benefits are reviewed after go-live.	Ensures automations become part of BAU rather than separate technical experiments.

Key deliverables

- 3-5 further automations live
- Prioritised automation backlog visible to leadership
- Internal staff development pathway in place
- Code review and design review process embedded
- Service adoption model agreed

Internal training focus

Internal staff should begin pair development on real council processes. They should own smaller deliverables such as test scripts, support guides, exception analysis, simple workflow changes and component updates. The aim is practical competence, not just attendance on training courses.

Expected phase outcomes

- Cumulative total reaches approximately 6-11 live automations
- RPA is recognised across multiple services
- Internal staff can support and contribute to smaller builds
- The council has a governed backlog rather than ad hoc requests
- Benefits and exceptions are visible through agreed reporting

Phase 4: Months 10-12 - Optimisation, Handover and Sustainability

Optimise the live estate, complete knowledge transfer, formalise BAU ownership and produce the year-two roadmap for continued automation growth.

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Workstream	Detailed activity	Why this matters
Final delivery	Deliver the final 2-5 automations needed to reach the year-one target of 8-16 live processes. Prioritise high-value processes with manageable support risk.	Ensures delivery continues while the capability is being stabilised.
Optimisation review	Review each live automation for runtime, exception trends, failure reasons, success rate, support burden, benefits and improvement opportunities.	Improves reliability and helps leadership understand the true value of the live estate.
Documentation completion	Ensure each automation has final PDD, SDD, process overview, risk assessment, handover document, runbook, test evidence and service sign-off.	Creates a complete knowledge base for internal ownership and audit purposes.
Support transition	Define BAU monitoring, incident handling, reruns, access ownership, password management, VM maintenance and escalation routes.	Prevents reliance on one external person for everyday support.
Knowledge transfer	Run structured handover covering Orchestrator, queues, schedules, credentials, component libraries, code structure, reporting templates and common failure scenarios.	Transfers practical knowledge into the council.
Future roadmap	Create a year-two roadmap covering further automations, internal roles, recruitment needs, AI/document understanding opportunities and governance improvements.	Gives directors a clear next investment decision and route to scale.

Key deliverables

- Final automations delivered to reach 8-16 live total
- Optimisation review of full live estate
- Complete handover and documentation pack
- BAU support model agreed
- Year-two roadmap produced

Internal training focus

By the end of Phase 4, internal staff should be able to monitor live jobs, read logs, investigate common failures, support UAT, update documentation, manage controlled changes and contribute to smaller automations. Any remaining gaps should be captured in the year-two training plan.

Expected phase outcomes

- Council has a sustainable RPA capability rather than dependency on external delivery
- Internal staff can monitor and support live jobs
- Leadership has clear evidence of value and remaining opportunities
- Reusable libraries and standards are ready for future development
- The programme can move into lighter advisory support if appropriate

8. Internal Training, Governance and Risk Controls

How the programme avoids consultancy dependency and keeps production delivery safe

A major measure of success is whether the council can continue operating and improving RPA after the initial engagement. Training should therefore run alongside delivery from day one. Internal staff should learn using real council processes, because this is where they understand the relationship between operational process design, system behaviour, exception handling and production support.

Area	Practical approach	Result
Training	Shadowing, pair development, UiPath fundamentals, PDD/SDD writing, testing, Orchestrator monitoring, exception triage and component usage.	Internal staff move from awareness to contribution and support.
Governance	Single intake route, opportunity scoring, service owner approval, design review, risk assessment, UAT sign-off and deployment checklist.	Automation requests are controlled and prioritised.
Risk	Assess data sensitivity, access permissions, operational impact, business continuity, exception handling and audit requirements for each process.	Directors and IT have confidence that RPA is safe and supportable.
Reporting	Track transactions, success rate, exception rate, manual referrals, estimated hours saved, failures, improvement actions and ROI outputs. Larger processes can include monthly, quarterly and yearly insight reporting.	Benefits are evidenced realistically and issues are visible.
Support	Define monitoring, incident handling, reruns, manual exception routing, ownership, automated credential management and escalation routes before go-live.	Live automations are managed as BAU services.

Training outcome

By month 12, internal staff should be able to support the live estate, contribute to documentation and UAT, understand Orchestrator, review logs, triage common failures and build or amend smaller automations under agreed standards.

Governance outcome

By month 12, the council should have a governed pipeline, clear prioritisation model, documented support route, reusable standards, agreed status reporting and a measured view of benefits across live automations.

9. Commercial Structure and Engagement Options

Positioned as a capability build and delivery programme

The commercial structure should reflect the scope of the engagement. This is not only development activity. It includes programme shaping, service discovery, process assessment, UiPath delivery, component library creation, documentation standards, risk management, internal training, production support design, benefits reporting and knowledge transfer.

Commercial item	Proposed structure
Engagement model	Outside IR35, initial 12-month engagement.
Full-time day rate	GBP 1,000 per day.
Quarterly cost	GBP 55,000 per quarter, based on approximately 55 working days.
Annualised value	GBP 220,000 across the initial 12-month period.
Delivery target	8-16 live automations, with internal training, component libraries, governance, reporting assets and support model included.
Flexibility	Can be structured as full-time, phased, or part-time initially depending on budget, urgency and preferred delivery route.

If budget approval requires a lower-risk entry point, the first quarter can be positioned as a foundation and discovery phase with initial delivery. This would allow the council to validate the pipeline, prove the operating model and deploy the first automations before committing to the full year-one scale. The day rate should remain aligned to the capability being delivered; flexibility should be handled through structure, days and phasing rather than undervaluing the work.

Recommended positioning

The council is not buying isolated bots. It is buying a structured route to stand up an internal RPA capability: live automations, reusable components, documentation, governance, reporting, staff training and a route to sustainability. This provides stronger long-term value than relying on a consulting firm to deliver disconnected automations that require external support for every change.