

Enterprise Automation Playbook 2022

November 2022: Complimentary Abstract / Table of Contents



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risk, technologies

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sustainability, portfolios

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Objective

The **Enterprise Automation Playbook** empowers enterprises at various stages of their process automation and transformation journeys with insights, methodologies, and practical advice to achieve best-in-class outcomes from Intelligent Automation (IA).



Overview and abbreviated summary of key messages

Following the pandemic, organizations have been increasingly turning to Intelligent Automation (IA) – a combination of technologies such as Robotic Process Automation (RPA), Intelligent Document Processing (IDP), process mining, task mining, process orchestration, and conversational Artificial Intelligence (AI) – to help them transform into digital-first businesses. This Playbook taps various frameworks, such as Everest Group’s Pinnacle Model™ and Capability Maturity Model (CMM), to empower enterprises to adopt, expand, and scale their automation journeys. It also evaluates Pinnacle Enterprises’ winning strategies to build IA capabilities and generate superior business impact and outlines a framework for enterprises to develop the business case for IA adoption

Some of the findings in this report, among others, are:

The need to become a digital-first enterprise

- Evolving into a digital-first business is becoming increasingly important for organizations to remain resilient and competitive
- IA enables organizations to successfully evolve their operating models, meet their strategic objectives, and achieve enterprise-wide automation
- IA’s role in helping enterprises transform to digital-first operations and address business challenges is driving rapid adoption

The IA paradigm

- The enterprise automation life cycle starts from discovery and ends at continuous monitoring, which acts as a feedback loop back to discovery
- An IA platform offers capabilities that serve the key requirements across the different stages of enterprise automation life cycle
- Enterprises are achieving increased business value by combining multiple IA technologies and adopting a holistic intelligent automation

Enterprise automation journey

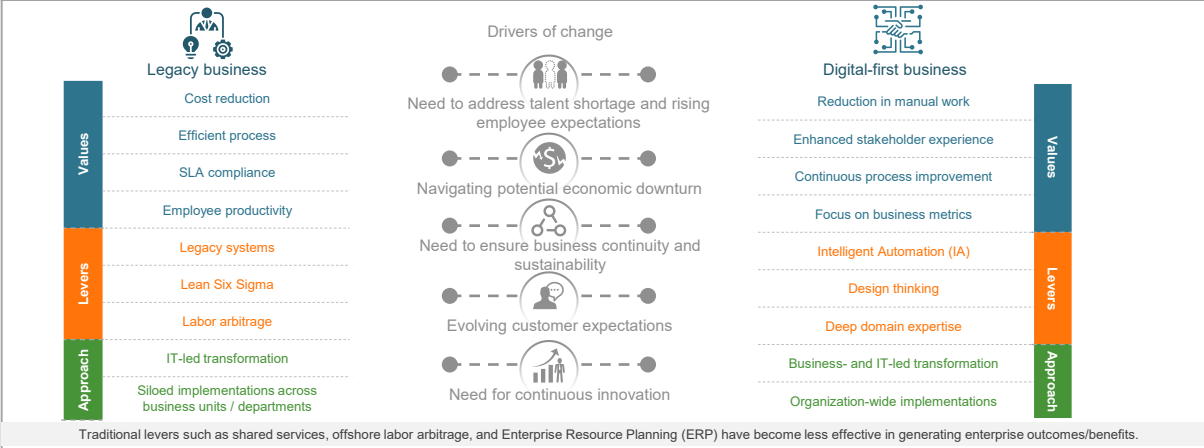
- Adoption of IA can be driven by ad hoc needs to optimize a few processes or as part of an enterprise-wide strategy to transform operations
- A hybrid model of IA adoption brings together the best attributes of top-down and citizen-led approach, overcoming the respective shortcomings
- Enterprises can break down their automation journeys into five distinct steps, including understanding the current state and executing against the mapped path

Accelerating the enterprise automation journey

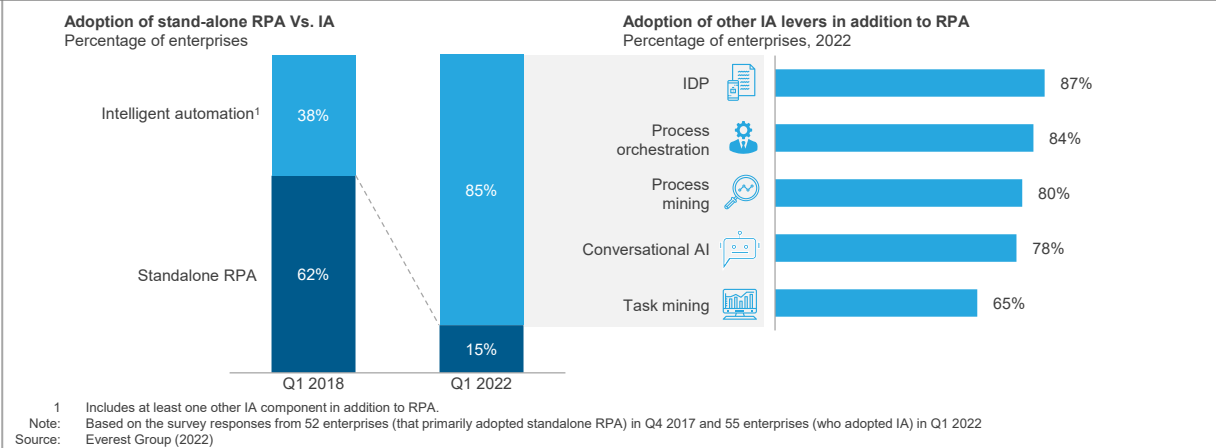
- Maintaining a healthy transformation pipeline is critical to ensuring enterprise-wide automation, and it comprises four key elements
- To choose the right intelligent automation solution, enterprises need to consider factors such as product capabilities, ecosystem of service partners, product training and support, and commercial models
- An effective IA change management program includes five key levers to drive and embed the change within the organization

This study offers five distinct chapters providing a deep dive into key aspects of enterprise automation market; below are four charts to illustrate the depth of the report

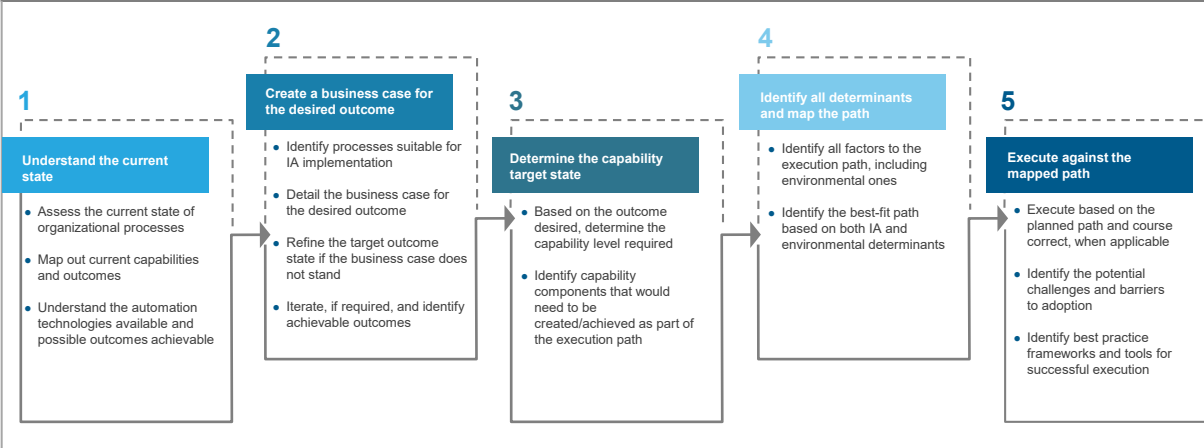
The need to become a digital-first enterprise



The IA paradigm



Enterprise automation journey




Accelerating the enterprise automation journey



The Enterprise automation report has four buyer case studies

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Case study | EY (page 1 of 2)



Enterprise overview
EY is a multinational professional services company merged in 1989 and currently has operations in over 120 countries, providing consulting, law, strategy, financial services, legal and tax services.
Website: https://www.ey.com/en_gl

Drivers of adoption

- **Improve process efficiency:** reducing process overheads and errors while improving the quality as well as enhancing the capabilities of the workforce
- **Reduce time to market:** reducing the time to market even when the transactions rise
- **Cost avoidance:** reducing future labor demand as well as the cost associated as the scale of operations grows

IA technologies leveraged


- RPA (both attended and unattended)
- Process mining
- Task mining
- Conversational AI
- IDP

Key business outcomes

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Case study | Security Benefit (page 1 of 2)



Enterprise overview
Security Benefit Corporation ("Security Benefit"), an insurance company that has been in business since 1911, provides a full range of retirement markets and wealth solutions. Security Benefit began its automation journey in 2021. Website: www.securitybenefit.com

Drivers of adoption

- **Reduce manual effort in less value-adding activities:** optimizing and engaging the workforce in value-adding activities
- **Application rationalization:** reduce inefficiencies due to legacy applications by eliminating legacy applications using automation or using automation until the application could be upgraded

IA technologies leveraged


- RPA
- Task mining
- AI/ML models

Key business outcomes

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Case study | Fiserv (page 1 of 2)



Enterprise overview:
Fiserv is a global financial technology and services company on the financial services industry and has evolved into a 10,000 financial institution clients, and handles near 100 million transactions. Website: <https://www.fiserv.com/>

Drivers of adoption

- **Improving efficiency:** automate repetitive, manual, and tedious tasks in the contact center vertical, for improved efficiency
- **Reducing costs:** curtail costs associated with increased number of customer contact center representatives
- **Higher accuracy:** being a financial services firm, accuracy, error reduction, and avoidance, etc. were also important drivers for adoption

IA technologies leveraged


- RPA
- Intelligent Document Processing (IDP)
- AI/ML (early stages)
- Conversational AI
- Process orchestration

Key business outcomes

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Case study | Dentsu International (page 1 of 2)



Enterprise overview
Part of Dentsu Group, Dentsu International is a network designed for helping clients predict and plan for disruptive future opportunities and create new paths to growth in the sustainable economy. Dentsu delivers people-focused solutions and services through five global leadership brands – Carat, Dentsu Creative, dentsu X, iProspect, and Merkle. Dentsu International operates in over 145 markets worldwide with more than 46,000 dedicated specialists, and partners with 95 of the top 100 global advertisers. Dentsu began its automation journey in 2017 and has partnered with UiPath as part of its automation program. Website: www.dentsu.com

Drivers of adoption

- **Reduce time spent in routine work:** reducing the time spent in repetitive, non-productive work that can instead be utilized in creative, human-centric work

Approach toward intelligent automation initiatives

- Project initiation
- Process selection
- Talent
- Organization structure

IA technologies leveraged

- RPA
- Process mining
- Task mining
- Conversational AI
- Intelligent Document Processing (IDP)
- Process orchestration

Key business outcomes

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Research calendar

Service Optimization Technologies (SOT)

Published Planned Current release

Reports title	Release date
Intelligent Process Automation (IPA) – Solution Provider Compendium 2022	May 2022
Intelligent Document Processing (IDP) – Technology Provider Compendium 2022	June 2022
Process Mining – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022	June 2022
Intelligent Document Processing (IDP) – State of the Market Report 2022	July 2022
Process Mining – Technology Provider Compendium 2022	July 2022
Task Mining – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022	August 2022
Conversational AI – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022	September 2022
Task Mining – Technology Provider Compendium 2022	September 2022
Robotic Process Automation (RPA) – Technology Provider Landscape with PEAK Matrix® Assessment 2022	October 2022
Enterprise Automation Playbook 2022	November 2022
Process Mining in Global Business Services (GBS)	Q4 2022
Process Mining – State of the Market Report 2023	Q4 2022
Conversing with AI – Conversational AI (CAI) State of the Market Report 2023	Q4 2022
Scaling Automation Across the Enterprise	Q4 2022
Digital Adoption Platforms (DAP) – State of the Market Report 2023	Q4 2022

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