Everest Group®

Market Report | Service Optimization Technologies

Attended Automation Playbook

March 2023: Complimentary Abstract / Table of Contents

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Objective

The **Attended Automation Playbook** empowers enterprises at various stages of their attended automation journey with insights, methodologies, and practical advice to help develop winning strategies and achieve best-in-class outcomes from their attended automation investments.

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Overview and abbreviated summary of key messages

As enterprises embark on their digital transformation journey with increasing focus on improving customer and employee experiences, attended automation is rapidly gaining adoption as a key technology to elevate stakeholder experience. However, enterprises often struggle with implementing attended automation effectively to achieve maximum benefits. This playbook describes a step-by-step approach to adopt and scale up the use of attended automation, tapping into various frameworks, such as the Everest Group Capability Maturity (CMM). It also highlights attended automation market characteristics, challenges to attended automation adoption, best practices for the attended automation, and enterprise case studies.

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

Need for digital transformation

- The objective of digital transformation has transformed beyond traditional objectives such as cost savings to enhancing the stakeholder experience. The evolving customer expectation and employee needs are driving this change
- Increased awareness about the need to improve employee experience and gaps in the traditional approach is driving the adoption of attended automation

Attended automation and its importance

- Contact center accounts for the majority of attended automation deployment. North America leads adoption of attended automation
- Key applications of attended automation that elevate stakeholder experience include on-the-job training and process guidance, on-demand data processing, and employee assistance
- Attended automation plays a critical role in enabling enterprises to adopt and scale citizen model by Improving automation accessibility, focusing on more relevant use cases, and improving the ease of getting started

Enterprises' attended automation journey

- Enterprises can break down their attended automation journey into five distinct steps: understand the current state, create a business case for the desired outcome, determine capability target state, identify all determinants and map path, and execute against mapped path

Accelerating the attended automation journey

- Change management, lack of healthy transformation pipeline, operational silos, talent and skill gap, and lack of senior leadership support are some of the challenges enterprises face in scaling attended automation initiatives
- Some of the best practices are around selecting the best fit enterprise-grade solution, effective talent management, change management, and the role of CoE
- Task mining can be leveraged to identify and optimize processes where attended automation can be used

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This study offers six distinct chapters providing a deep dive into enterprises' attended automation journeys; below are four charts to illustrate the depth of the report

Five steps for a successful attended automation journey

1 Understand the current state
- Map out the current attended automation capabilities and outcomes
- Understand the attended automation technology and the possible outcomes achievable

2 Create a business case for the desired outcome
- Identify the processes suitable for attended automation implementation
- Detail the business case for the desired outcome
- Refine the target outcome state if the business case does not stand
- Iterate, if required, and identify the achievable outcomes

3 Determine capability target state
- Based on the outcome desired, determine the capability level required
- Identify the capability components that would need to be created/achieved as a part of the execution path

4 Identify all determinants and map path
- Identify all determinants of the execution path, including the environmental ones
- Identify the best-fit path based on both attended automation and environmental determinants

5 Execute against mapped path
- Execute based on the planned path
- Identify the potential challenges for adoption
- Identify best practice frameworks and tools for successful execution
- Establish continuous monitoring mechanism and a feedback loop to refine the target state and determine the capabilities required

Create a business case for the desired outcome

Identifying processes | Prioritizing processes | Creating a business case

Applicability of attended automation

Long list of processes

Filtering criteria

- Processes that involve managing multiple applications and databases to address/execute customer queries/requests
- Processes that involve a high share of repetitive and mundane manual activities that hamper employee productivity and affect customer satisfaction

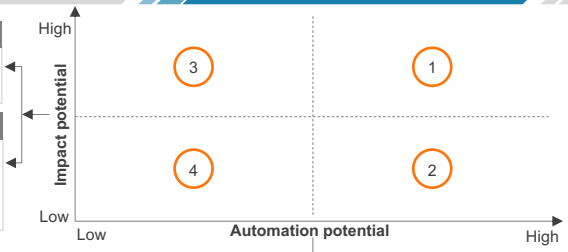
List of processes to be considered for attended automation

Framework to identify high priority processes for attended automation

Identifying processes | Prioritizing processes | Creating a business case

Cost and volume of transactions
Average cost per transaction and volume of transactions

Business criticality
Relative correlation of the process with organizational targets, e.g., customer experience and employee experience



Process complexity
Degree of human judgment, expertise, and experience required. Also, the number of applications/databases involved to execute a process

Existing process health
A measure of the extent to which the process is well defined and structured for the successful adoption of attended automation

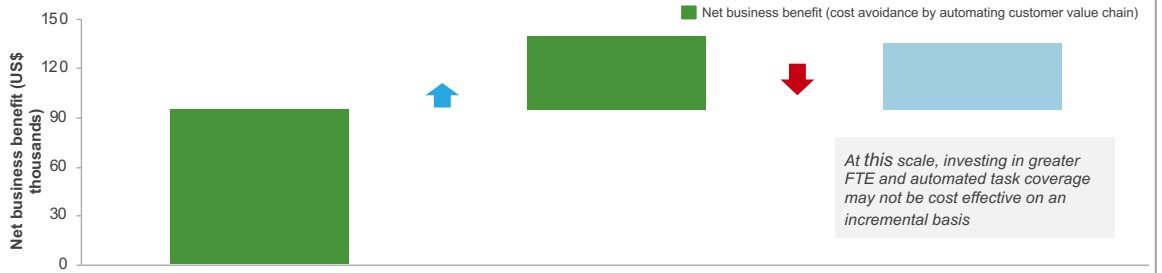
Technology fragmentation
Level of fragmentation in technology

Scale of process/operations
The scale of operations for the process (such as the volume and frequency)

Extent of digitization
Degree of digitized data and digital infrastructure already in existence

Building a business case for attended automation adoption

Identifying processes | Prioritizing processes | Creating a business case



	State 1	State 2	State 3
Breadth of FTE coverage	50%	75%	95%
Breadth of tasks automated	20%	30%	35%
License and implementation cost	x	1.2x	1.3x

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Published | Planned | Current release

Reports title	Release date
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Visualizing Business Operations at a Micro Level – Task Mining State of the Market Report 2022	October 2022
Robotic Process Automation (RPA) – Technology Provider Landscape with PEAK Matrix® Assessment 2023	October 2022
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Unlocking the Power of Hybrid Workforce – Process Orchestration State of the Market 2023	February 2023
Attended Automation Playbook	**March 2023**
Intelligent Process Automation (IPA) – Solution Provider Landscape with PEAK Matrix® Assessment 2023	Q1 2023
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