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GLOBAL OUTSOURCING

IN PARTNERSHIP WITH

2 0 1 7 **FIMER** IAOP GLOBAL OUTSOURCING 100 PARTNERSHIPS

Outsourcing is transforming businesses by unlocking the potential of robots and humans.

IN AN AGE OF TUMULTUOUS CHANGE, COMPANIES ARE MOVING SWIFTLY TO HARNESS all that automation has to offer. But that doesn't necessarily mean sending staffers packing and bringing in a team of robots.

To access the best new systems and know-how, companies are outsourcing more strategically than ever. In the process, they're engaging partners who offer a lot more than savings. They're gaining insight that can transform their own business processes and deliver crucial advantages for a fast-changing world.

"More and more, outsourcing is not primarily done to reduce costs," says Debi Hamill, CEO of the International Association of Outsourcing Professionals (IAOP). "That was the main reason for outsourcing in the beginning: to get better talent at less cost ... Today innovation is what customers are looking for and what providers need to address."

High on the agenda for 2017 is investing in new IT-based capabilities, according to KPMG's Global Insights Pulse survey from Q4 2016. More than half of respondents said they plan to add more data analytics this year. Two-thirds plan to ramp up robotic process automation (RPA), which uses software enhanced with artificial intelligence and machine learning to perform high-volume



See how Birgitte from ISS combines IBM Watson IoT vith service excellence to leliver great workplace xneriences

service

Birgitte Nørgaard, Facility Manager at ISS in Copenhagen, Denmark.

Working with the future of

him human









RESHAPING THE LANDSCAPE: Artificial intelligence isn't replacing customer service agents. It's empowering them to do their jobs with maximum effectiveness.

tasks that used to involve human labor. This shift has been dramatic.

In 2015, only 8% of companies said RPA

was an essential capability for undertaking new initiatives. Just one year later, 39% said it was. In fact, the rapid proliferation of RPA has companies and scholars asking whether it's time to bring more functions back in-house and let robots do the work.

"Current BPO [business process outsourcing] providers will increasingly compete against RPA insourcing," writes Mary Lacity, an outsourcing expert at the University of Missouri-St. Louis, in the IAOP's PULSE magazine last November. "They will have to convince customers that their combined labor-automation models will produce value to customers over and above what customers can produce on their own."

NEW TECHNOLOGIES SHAPE TODAY'S OUTSOURCING

Providers have a strong case to make for why outsourcing still makes sense, perhaps now more than ever. In fact, they're most often the ones initiating deals that involve cognitive and robotic process automation, according to the Deloitte 2016 Global Outsourcing survey. As specialists, they typically have more access to the right tech tools than their clients do and more experience in leveraging them to solve today's business problems.

Cloud computing marks an example of terrain where companies find they don't need to invest heavily to build and maintain their own in-house infrastructure. Nearly 40% of global outsourcing contracts involve cloud-based solutions, such as software as a service or infrastructure as a service, according to IAOP's 2017 State of the Industry survey. As technologies emerge, companies are getting the access they need through partners who deploy them for a range of clients.

Artificial intelligence (AI) is reshaping the landscape, too, though not necessarily by displacing

workers. At TELUS International, a global BPO company with over 25,000 employees who speak 35 languages, Al isn't replacing

customer service agents. It's empowering them to do their jobs with maximum effectiveness, according to president and CEO Jeffrey Puritt.

Virtual agents might be able to handle the simplest calls, Puritt says, but customers calling with complex problems need interaction with a highly trained human agent. Voice and video recognition tools can support agents in real time in various ways, such as alerting them when customers are on the verge of becoming frustrated.

"We want to be able to deploy and exploit automation and digitization wherever possible," Puritt says. "At the same time, we're increasing our investments in training our agent population so that they can work effectively with these tools and technologies."

As automation and other disruptive forces shatter business models in industries from media to transportation, companies are taking no chances. They're assessing their own models to ferret out what needs tweaking, overhauling, reinventing. That includes taking a hard look at both their outsourcing and internal processes in a bid to adapt wherever necessary.

Business models for outsourcing are in flux as traditional arrangements share the stage with as a service (cloud-based) and other game-changing models. No fewer than 59% of companies that outsource are preparing and building competencies that enable new business models, according to IAOP's State of the Industry report.

PARTNERS WANTED TO TRANSFORM PROCESSES

As companies cultivate new types of partnerships, they're expecting more from their partners, according to Deloitte's 2016 Global Outsourcing survey.

"This 'more' they seek comes in the form of the transformational benefits that managed service providers can offer through robotic and cognitive pro-

TELUS INTERNATIONAL AND GOOGLE CLOUD

A Collaboration Focused on Customer Experience Innovation

TELUS International provides customer support to some of the tech industry's most innovative and respected brands. And in many instances, it uses the technology it supports to deliver the best customer experience to a savvy user base.

Take its collaboration with Google, which started in 2011 when G Suite (previously Google Apps for Work) was growing rapidly; those new customers expected service in line with Google's worldclass brand.

At the same time, TELUS International was looking to enable its fast-growing global operations. Products like Google Docs, Google Drive, and Google Hangouts have helped TELUS International integrate its operations, including acquisitions on three continents, onto a common collaborative platform.

"Deploying Google Cloud has made our more than 25,000 team members more productive when supporting customers," says TELUS International president and CEO Jeffrey Puritt. "From collaboration and standardization to business intelligence and machine learning, Google enables us to speak the same language across our global business."

Google selected TELUS International as a partner in customer support because of its strong employee retention. brand commitment and compatible culture. TELUS International enjoys attrition rates well below industry average, and employee engagement scores exceed 80%, according to Aon Hewitt.

Months into the pilot program, Google saw its own customer satisfaction ratings climb, and as the Google customer base exploded, so too did its relationship with TELUS International. Now, TELUS International devotes 2,000 employees to handling support cases for several Google products, while Google continues to grow its Cloud customer base.

And when it comes to customer experience innovation, both parties bring a lot to the table.

From enhancing Google's training, quality and coaching programs to finding the right success metrics,

call floor."

programs.

TELUS International



TELUS International and Google Cloud have worked together to provide a positive experience for both employees and customers. Likewise, Google has helped TELUS International by equipping its team leaders with Google Chromebooks loaded with upto-the-minute performance data while they walk the floor. "They can use relevant information in real time to influence immediate and meaningful changes, including on-the-spot coaching of agents," says Peter "Scotch" Scocimara, senior director of support for Google Cloud. "It really changes the dynamic of the entire

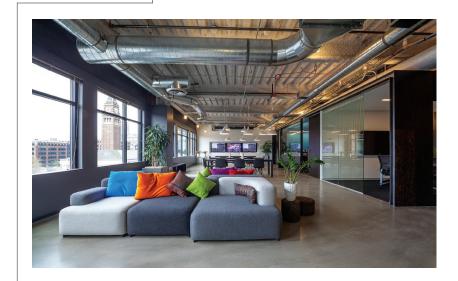
An important side benefit: as Google seeks continual feedback on products, TELUS International shares from its own experience. Most important, like Google, TELUS International strives to make work satisfying, providing exceptional perks, from on-site daycare to game rooms to gyms, to thriving community giving

"Our industry has been slow to realize that surrounding employees with the finest tools and technologies is great, but if engage-

> ment is low and attrition is high, customer service will suffer," says Puritt. "The customer experience will never exceed the employee experience." With aligned corporate cultures and a shared dedication to customer experience innovation, it's

clearly a collaboration that works both ways.

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▲ THE MODERN OFFICE: Many offices are saddled with underutilized meeting rooms. Or they're beholden to individualized desk and cubicle seating that hinders collaboration among employees.

cess automation, operational flexibility and scalability, merger and acquisition enablement, and risk mitigation—all leading to an increase in service innovation as the result of rapidly changing technology," the Deloitte report says.

Even on this new frontier, they're already demanding results. Thirty-five percent of companies surveyed by Deloitte say they measure how much value providers bring through innovation. Twenty-one percent write those expectations into contracts at the outset. When the work is done, clients want impacts that drive positive process change inside their organizations.

Consider real estate. Companies in a range of industries contract with ISS World Services, a Copenhagen-based facility services leader with around 500,000 employees in more than 70 countries. ISS studies clients' goals and encourages them to work differently as they manage their spaces.

"Facilities can be a tool to increase both efficiency and satisfaction," ISS Group CEO Jeff Gravenhorst says.

He observes, for instance, that many offices are beholden to individualized desk and cubicle seating that hinders collaboration among employees. By redesigning and building out workspaces to make them more efficient and inspiring, ISS shapes how a client's staff works better together. That reshapes how business gets done inside the client organization.

Another example comes from the BPO arena, where Vee Technologies helps clients get paid quickly for complex services rendered. The company's thousands of employees at six centers in India are so highly trained that the bills they process for health care providers and others are disputed less often.

Too many BPOs are "just moving it through as fast as possible so that you get the bill out," says Vee Technologies president Patrick O'Malley. "If the bill is not accurate, it just makes it much tougher because the payer won't pay it." Vee Technologies also helps customers improve their

in-house systems. When Vee's U.S. executives call on hospitals and other providers, they explain how to remove hurdles that are slowing the revenue collection process.

As outsourcing evolves to be less about cheaper production and more about value enhancement, it's critical to structure partnerships to clarify expectations and lay groundwork for success. Today's contracts go beyond describing what functions will be performed and on what timetable. Providers need to know exactly how they're expected to transform a client's business processes and which benchmarks will signal whether they're on track.

Consultants see room for improvement, as evidenced in the "disconnect" that Deloitte sees afflicting all too many outsourcing deals. Of the companies that measure a provider's contribution to innovation, only about half build such measurements into their contracts. That can be a missed opportunity in an age when, according to the Deloitte survey, 70% of respondents are either implementing or discussing the use of robotic and cognitive process automation to improve outsourcing results.

CONTRACTS: OUTCOME VERSUS OUTPUT

Still, the shape of contracts is evolving. Providers (Continued on page S10)

WHEN COMPLEXITY IS AN OBSTACLE

Vee Technologies Helps Clients Get Paid Fast

Some of America's major health systems ran into a major revenue problem last year after acquiring a bunch of new facilities and medical practices.

Insurers weren't paying bills issued by the newly acquired properties. That meant millions of dollars weren't being collected for procedures performed months earlier.

Why wouldn't they pay? One main reason: Some 100,000

charts hadn't been coded correctly. The organization urgently needed an army of skilled coders to get to work in a snap.

The solution came from Vee Technologies. With thousands of employees in India, Vee Technologies has the manpower in business process outsourcing (BPO) to rapidly scale up or down, depending on a client's changing needs.

"The more complex and the more difficult the task, the more people choose us," says Vee Technologies president Patrick O'Malley.

In one case, accounts that had been taking six months to collect were quickly fixed so that bills were paid within an average of 45 days. What's more, it now takes less than 48 hours for a new chart to be coded and invoiced to the payer.

"We've been able to help a client standardize across their enterprise, which is national in scope, and improve both the accuracy in coding and their collection percentages," O'Malley says. "Improving their turnaround time helps them get paid faster."

Vee Technologies gets the job done quickly and accurately for clients in health care,



"The more complex and the more difficult the task, the more people choose Vee Technologies."

engineering, and other industries because its training is second to none. The company owns and operates Sona College of Technology, which educates 10,000 students for careers in various fields. The top 8% of graduates are recruited for jobs at Vee Technologies.

> Patrick O'Malley, President of Vee Technologies

nologies get access to skilled agents who know their firm's unique needs. Because they're assigned to stay with specific clients' accounts, they're already familiar when

Clients of Vee Tech-

new work arrives. Some firms opt for terms that let them have their own Vee Technologies team dedicated exclusively to them.

Because flexibility is crucial, clients of Vee Technologies have an option to

> pay based on volume, not necessarily fixed monthly rates. That gives them peace of mind, knowing they don't have to build cushion into their projections or risk contracting for more services than they need.

A track record for delivering value helps account for

Vee Technologies' rapid growth. Last year alone, revenues grew by 65%. Also within the past year, a new center opened with facilities to accommodate 10,000 workers. Vee Technologies is

on track to fill all those seats over time as the BPO business keeps growing.

When collecting revenue depends on managing complexity with accuracy and speed, companies turn to Vee Technologies. And it pays off.



2 0 1 7 IAOP GLOBAL OUTSOURCING 100

Company	Web Address	2017 Group	Size & Growth	Customer References	Awards & Certifications	Programs for Innovations	Programs for CSR
ACCELYA	w3.accelya.com	Leader		*	*	*	
ACCENTURE	accenture.com	Leader	*	*	*	*	*
ACQUIRE BPO	acquirebpo.com	Leader		*			
AEGIS LIMITED	aegisglobal.com	Leader		*	*	*	*
AGS HEALTH	agshealth.com	Leader		*	*		
ALORICA	alorica.com	Leader	*	*		*	
AON HEWITT	aonhewitt.com	Leader		*		*	*
ARTHUR LAWRENCE	arthurlawrence.net	Rising Star		*			
NRVATO	arvato.com	Leader	*	*	*	*	*
URIGA	auriga.com	Rising Star		*		*	*
UXIS	auxis.com	Rising Star		*			
BELL INTEGRATOR	bellintegrator.com	Leader		*			
ANON BUSINESS PROCESS SERVICES	cbps.canon.com	Leader		*	*	*	*
:BRE	cbre.com	Leader	*	*	*	*	*
:GI	cgi.com	Leader		*	*	*	*
GS	cgsinc.com/en	Leader		*	*		
GS CHINASOFT INTERNATIONAL	chinasofti.com	Leader	*	*	*		
	cienet.com	Leader	^	*	*	*	*
				*	*	*	*
IKLUM OLLIERS INTERNATIONAL	ciklum.com	Leader Leader	*	*	*	*	~
	colliers.com		*	*	*	*	*
	concentrix.com	Leader					
USHMAN & WAKEFIELD	cushmanwakefield.com	Leader	*	*	*	*	*
DATROSE	datrose.com	Rising Star		*		*	*
DHC	dhc.co.in	Leader		*			
OONLEN	donlen.com	Leader	_	*		*	
LEKS	eleks.com	Rising Star		*	*	*	
LLUCIAN	ellucian.com	Leader		*		*	
MERIO GLOBESOFT	emeriocorp.com	Leader		*	*		
NDAVA	endava.com	Leader				*	
PAM SYSTEMS	epam.com	Leader	*	*	*	*	*
XL	exlservice.com	Leader	*	*	*	*	*
IRST LINE SOFTWARE	firstlinesoftware.com	Rising Star		*		*	
IRSTSOURCE SOLUTIONS	firstsource.com	Leader		*	*		
ISCHER	fischercompany.com	Leader		*		*	*
PT SOFTWARE	fpt-software.com	Leader		*	*		*
EBBS HEALTHCARE SOLUTIONS	gebbs.com	Leader		*	*	*	
EP	gep.com	Leader					
RUPO ASSA	grupoassa.com	Leader		*	*	*	*
IAPPIEST MINDS	happiestminds.com/location	Leader		*	*	*	
ICL TECHNOLOGIES	hcltech.com	Leader	*	*	*	*	*
IEXACTA	hexacta.com	Rising Star		*		*	*
IGS	teamhgs.com	Leader	*	*	*	*	*
BA GROUP	ibagroupit.com	Leader		*	*	*	*
CL SERVICES	icl-services.com	Leader		*	*	*	*
MS PEOPLE	imspeople.com	Rising Star		*	*		
NDECOMM GLOBAL SERVICES	indecomm.net	Leader		*	*		
NTEGREON	integreon.com	Leader		*	*	*	
NTETICS	intetics.com	Rising Star		*	*	*	
SS	issworld.com	Leader	*	*	*	*	*
TC INFOTECH INDIA	itcinfotech.com	Leader		*	*	*	*

			Size &	Customer	Awards &	Programs for	Programs
Company	Web Address	2017 Group	Growth	References	Certifications	Innovations	for ČSR
ITRANSITION	itransition.com	Rising Star		*	*	*	
	jll.com	Leader	*	*	*	*	*
KELLYOCG	kellyocg.com	Leader	_	*	*	*	*
KNOAH SOLUTIONS	knoah.com	Rising Star		*	*		
LEASEPLAN USA	us.leaseplan.com	Leader	*	*	*	*	
LEGALBASE	legalbaselaw.com	Rising Star		*			
LIQUIDHUB	liquidhub.com	Leader		*		*	
LOGICALIS	us.logicalis.com	Leader		*		*	
LONG VIEW	longviewsystems.com	Leader				*	
LUXOFT	luxoft.com	Leader	*	*	*	*	
MAYKOR	maykor.com	Leader		*	*	*	*
MERA	mera.com	Leader		*	*		
MINDTREE	mindtree.com	Leader			*	*	*
MIRATECH	miratechgroup.com	Rising Star		*	*	*	
NEWMARK GRUBB KNIGHT FRANK	ngkf.com	Leader	*	*		*	*
NEXIENT	nexient.com	Rising Star		*		*	
N-IX	n-ix.com	Rising Star		*		*	*
ONELINK BPO	onelinkbpo.com	Rising Star	*	*			
PACTERA	pactera.com	Leader	*	*	*	*	*
PROGRAM-ACE	program-ace.com	Rising Star		*			*
PYTHIAN	pythian.com	Leader		*			
QUATRRO	quatrro.com	Leader		*	*		*
QUEST GLOBAL	quest-global.com	Leader			*		
QUINTILESIMS	imshealth.com	Leader	*	*	*	*	*
QUISLEX	quislex.com	Rising Star		*	*		
QX	qxltd.com	Rising Star		*	*		
R.R. DONNELLEY	outsourcing.rrd.com	Leader			*		*
SIGMA SOFTWARE	sigma.software	Rising Star		*			*
SITEL	sitel.com	Leader	*		*	*	
SOFTENGI	softengi.com	Rising Star		*			
SOFTJOURN	softjourn.com/en	Rising Star		*		*	*
SOFTSERVE	softserveinc.com/en-us	Leader		*	*	*	
SONATA SOFTWARE	sonata-software.com	Leader		*	*	*	
SPI CRM	spicrm.com	Leader		*	*		
STEFANINI	stefanini.com	Leader	*	*	*	*	
SUTHERLAND GLOBAL SERVICES	sutherlandglobal.com	Leader	*	*	*	*	
SWISS POST SOLUTIONS	swisspostsolutions.com	Leader		*	*	*	
SYNTEL	syntelinc.com	Leader		*		*	*
TATA COMMUNICATIONS TRANSFORMATION SERVICES (TCTS)	tatacommunications-ts.com	Leader		*	*	*	*
TEAM INTERNATIONAL SERVICES	teaminternational.com	Rising Star		*		*	*
TELEPERFORMANCE	teleperformance.com	Leader	*	*	*	*	*
TELETECH	teletech.com	Leader	*			*	*
TELUS INTERNATIONAL	telusinternational.com	Leader		*	*	*	
TIVIT	tivit.com.br	Leader		*	*		
TRANSCOSMOS INC.	trans-cosmos.co.jp	Leader	*	*	*		
TRIGENT SOFTWARE	trigent.com	Rising Star		*			
VEE TECHNOLOGIES	veetechnologies.com	Rising Star		*	*		*
VIRTUSAPOLARIS	virtusapolaris.com	Leader	*	*	*	*	*
WILLIS TOWERS WATSON	willistowerswatson.com	Leader		*	*		
WNS GLOBAL SERVICES	wns.com	Leader			*	*	*
WING GLUDAL SERVICES	WIIS.CUIII	Leavel			*	^	~

IAOP GLOBAL OUTSOURCING 100

2 0 1 7 IAOP GLOBAL OUTSOURCING 100

IAOP WORLD'S BEST OUTSOURCING ADVISORS

Сотралу	Web Address	Size & Growth	Customer References	Awards & Certifications	Programs for Innovations	Programs for CSR
AVASANT	avasant.com	*	*	*	*	*
BAKER MCKENZIE	bakermckenzie.com	*	*		*	*
BIRD & BIRD	twobirds.com	*	*		*	
THE BOSTON CONSULTING GROUP	bcg.com	*	*	*	*	*
DELOITTE CONSULTING	deloitte.com/us	*	*	*	*	*
DLA PIPER	dlapiper.com	*	*	*		
ELIXIRR PARTNERS	elixirr.com		*		*	
ERNST & YOUNG	ey.com	*	*	*	*	*
FOLEY & LARDNER	foley.com		*	*	*	
INFORMATION SERVICES GROUP	isg-one.com	*	*	*	*	*
KIRKLAND & ELLIS	kirkland.com		*	*	*	*
KPMG INTERNATIONAL	kpmg.com	*	*	*	*	*
MAYER BROWN	mayerbrown.com		*			
OLSWANG	olswang.com		*		*	*
PACE HARMON	paceharmon.com		*	*	*	*
PILLSBURY WINTHROP SHAW PITTMAN	pillsburylaw.com		*		*	
QUINT WELLINGTON REDWOOD	quintgroup.com		*	*	*	*
TURTLETON & COMPAGNIE	turtleton.de		*			
WGROUP	thinkwgroup.com		*		*	
ZINNOV	zinnov.com		*	*	*	

increasingly take steps to make sure they're incentivised on the basis of client-centered outcomes rather than mere outputs, such as the number of tasks completed.

Take ISS World Services. Standards vary based on a client's needs and goals. In a hospital, ISS focuses on making facilities more hygienic and food more nutritious, because the hospital's purpose is to get people well. In an airport, ISS strives to boost the client's rankings by ensuring security lines are flowing.

"In outsourcing contracts, you see more and more clients adding on outcome-related KPIs," or key performance indicators, Gravenhorst says. "A KPI could, for example, be to improve a client's employee satisfaction because they have a goal to attract the right talent—and we can have an impact on that with the right service focus." Observers see outcome-based contracting as the wave of the future. That's evident in the forecast of outsourcing trends for 2017 from London law firm Taylor Wessing.

"While traditional service level regimes remain enormously important as tools to help measure and drive performance, with the nature of deals becoming increasingly transformational, there is a growing awareness that these can also be a blunt instrument," writes Martin Cotterill, a partner in Taylor Wessing's IT, Telecoms, and Competition group, on the firm's weblog. "Outcomebased deals offer an attractive alternative, that is, where critical components that mark the success of a deal are tied to the achievement of customer-centric, business-based outcomes."

In today's outsourcing, companies are thinking holistically about how to generate the productivity that clients seek. Years ago, productivity was tied to narrowly defined benchmarks, such as how many components roll off an assembly line per hour. But companies are now considering more factors, including safety and employee satisfaction, which can be costly if neglected.

At TELUS International, for example, agents aren't incentivized to keep every call as short as they can. Instead they're encouraged to take the time necessary

to solve the problem on the initial call whenever possible, according to CEO Puritt.

If performance bonuses are based on "how quickly they can end the conversation, the odds are they're going to rush to end the conversation even if they haven't solved the customer's problem," Puritt says. "When that happens, the customer phones back again and again and again." The total cost per case ends up being higher than if an initial call takes longer but resolves the issues.

PARTNERSHIPS, PLACES, POLITICS

Looking ahead, KPMG finds that companies are bringing a strong appetite for further outsourcing and investment in 2017. More than 90% of respondents said they plan to invest as much as or more than last year in RPA, cloud infrastructure, and cognitive automation, including AI and machine learning.

In this new environment, KPMG encourages strategic outsourcing that takes into account a wide array of emerging challenges and opportunities. Labor shortages, for instance, might be addressed through some combination of traditional, cloudbased, or robot-assisted partnerships. What's more, geopolitical risks aren't limited to potential wars and natural disasters; they also include fallout from new trade policies emerging in the United States and Europe.

"Develop different scenarios that describe the possible growth of protectionism and its impact on your organization," the KPMG report says in its list of actions to consider. "With a new administration in the U.S., companies need to carefully consider the possible impact of changes in trade laws, the imposition of heavy tariffs, currency market volatility, and a realignment of economic partnerships between companies and nations."

In preparing for what's to come, companies are also casting their nets more widely than ever and finding talent in long-overlooked places. The Global Impact Sourcing Coalition formed in September 2016 to encourage the practice of hiring workers from traditionally disadvantaged communities and enabling career advancement. By March, the coalition had counted 30 corporate members representing some 850,000 BPO workers. These firms have been persuaded in part by the business case for impact sourcing. They're drawn to the higher rates of employee engagement and lower rates of attrition. The practice helps their brands inspire consumers and employees alike by making a positive difference. Now the stories of their companies involve celebrating how they've brought jobs to U.S. military veterans and Native Americans as well as youth in Africa and refugees.

In Salem, India, Vee Technologies has been living its mission to provide global prosperity through success and jobs. Through its Sona College of Technology, the company helps over 10,000 local people gain practical skills and boost daily income from \$1 a day to \$5 a day.

"Salem gives us the ability to give back in a rural community," president O'Malley says. "It's less expensive. There's less turnover and fewer challenges of retention once [workers] are on board. They have a career mindset."

When companies outsource, what they're increasingly saying is, "I'd like to transform my business," says IAOP CEO Hamill. And the possibilities for how to do that keep expanding.

"It could be by automating my process, it could be by giving back to the community, it could be by hiring folks that probably were unemployable before, or it could be by digitizing everything," Hamill says. "But it is definitely about transforming your business."

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◀ TRANSFORMATION INNOVATION: More than 90 percent of respondents said they plan to invest as much as or more than last year in RPA, cloud infrastructure and cognitive automation, including artificial intelligence and machine learning.