



HYPER INTELLIGENT AUTOMATION

LANDSCAPE REPORT 2021



\$1.04 Tn

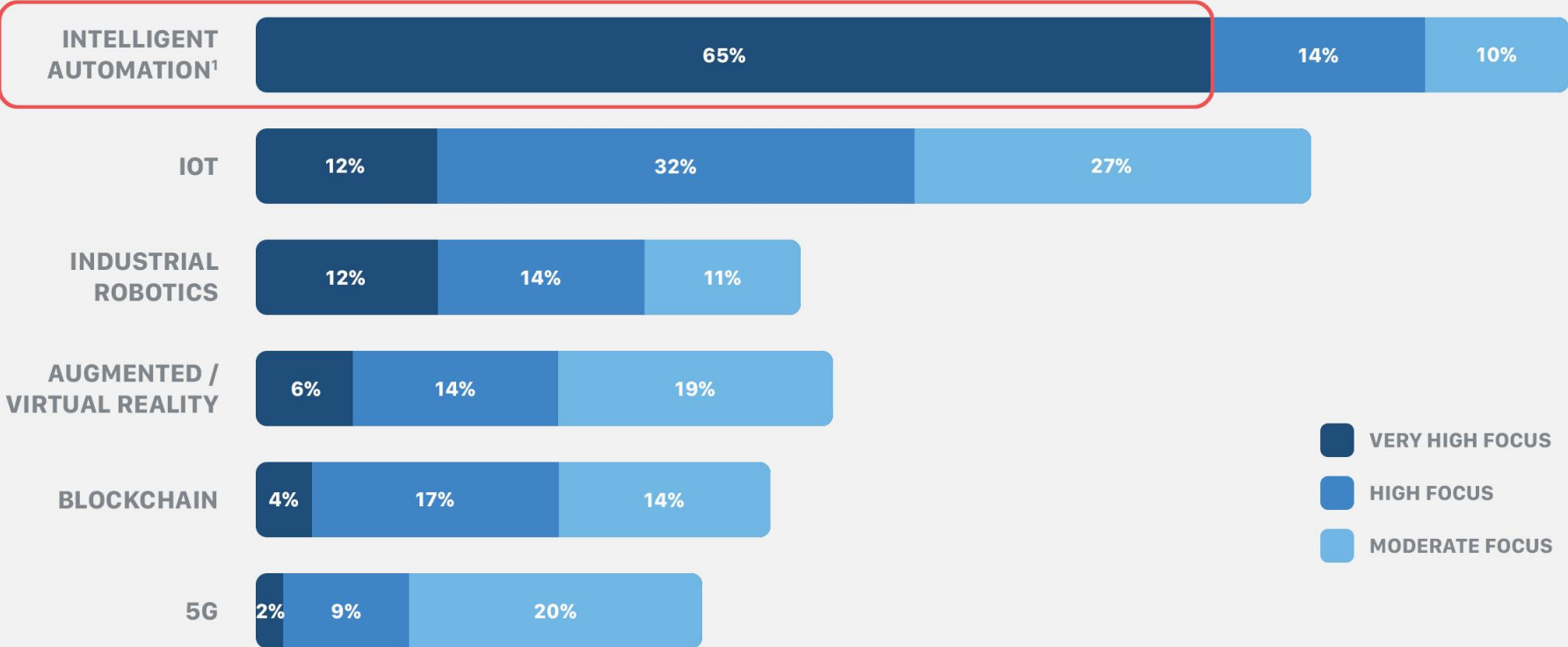
Enterprise Digital Transformation spend globally (FY21 estimate)

15-20%

Growth forecasted in Digital Transformation spend (FY21-26 CAGR)

TOP TECHNOLOGY PRIORITIES WITHIN ENTERPRISE DIGITAL TRANSFORMATION

GLOBAL CXO SURVEY
257 CXOs



 VERY HIGH FOCUS
 HIGH FOCUS
 MODERATE FOCUS

Note: 1) Intelligent Automation includes RPA, Low-Code/No-Code, Intelligent Document Processing, Process Mining, Intelligent Virtual Agents, and AI
Source: Zinnov's Global Automation CXO Survey 2021 of 257 CXOs

COVID-19 has significantly accelerated Enterprise Adoption of Automation



77% of Global CXOs claim that their Automation investments have gone up due to COVID-19

22% of enterprises say their automation investments have surged by more than 25%

CASE IN POINT: AUTOMATION-LED BUSINESS RESILIENCY

CLEVELAND CLINIC

Automated patient verification, registration, and vaccine administration

150K patients vaccinated in 2 months; enabled **90%** faster vaccine rollouts

THE UNITED STATES OF AMERICA

Automated disbursement of **1 Mn+** SBA (Small Business Administration) loans worth **\$350 Bn+**

90% reduction in time taken in SBA-related data management

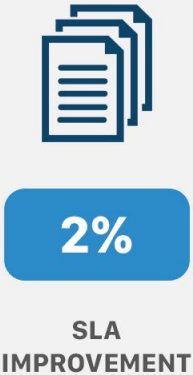
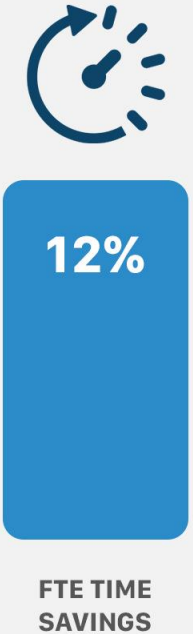
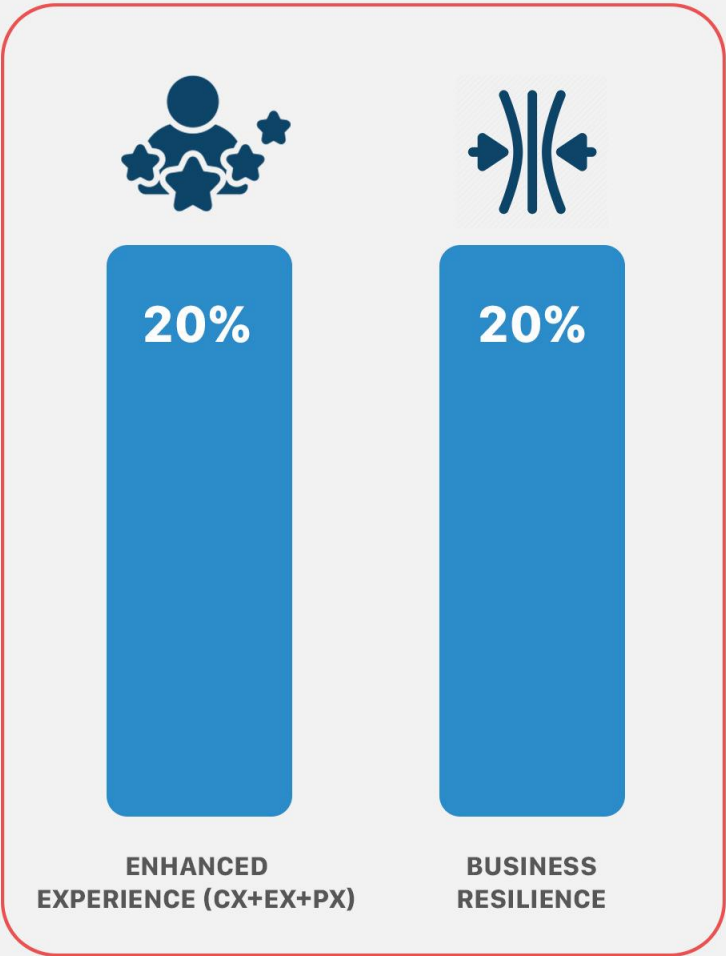
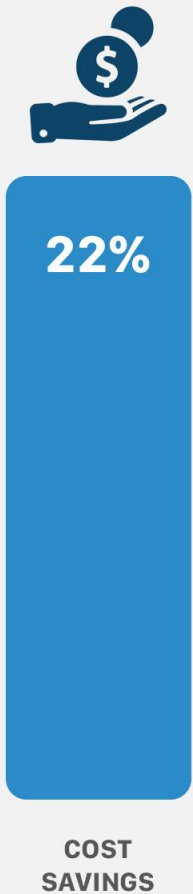
STANDARD BANK

Automated customer onboarding process, more than **60%** reduction in account opening time (to 5 minutes)

1 Mn+ monthly transactions automated

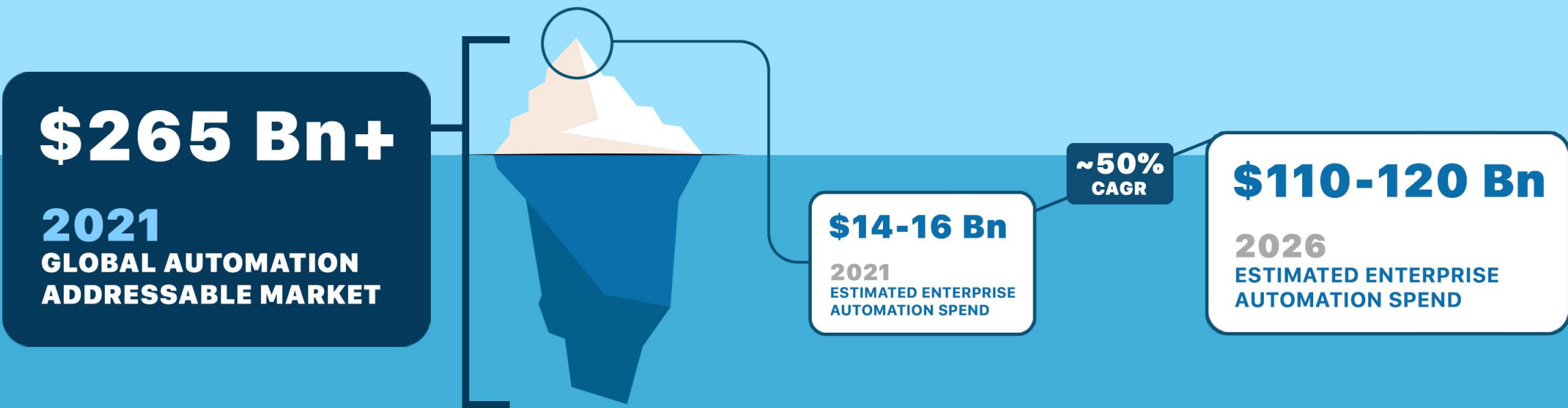
ENTERPRISE FOCUS ON KEY OUTCOMES FROM AUTOMATION

GLOBAL
CXO
SURVEY
257 CXOs



Consequently, Enterprise Investment in Automation is Growing rapidly

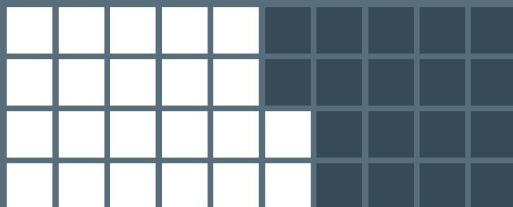
AUTOMATION MARKET SIZE (2021-2026)



PLATFORM VS SERVICE REVENUE (2021)

55%

Platform Revenue
(Commercial &
Internal)

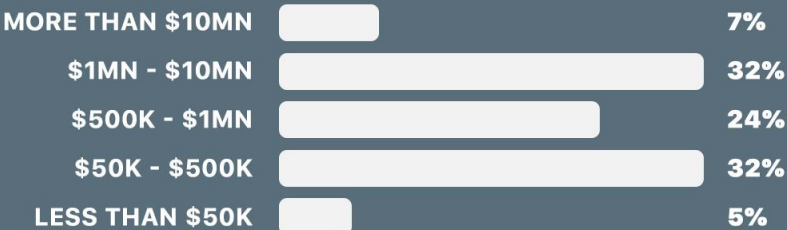


45%

Services Revenue
(In-house &
Outsourced)

ANNUAL ENTERPRISE INVESTMENT IN AUTOMATION (2021)

**GLOBAL
CXO
SURVEY**
257 CXOs



Source: Zinnov Research and Analysis, Zinnov – Global Automation CXO Survey 2021 of 257 CXOs
Notes: 1) All figures in the market size estimates pertain to Calendar Years (CY); 2) Automation market size estimates based on a total of Use Case Discovery (Task Mining & Process Mining), IDP, RPA & Intelligent Automation;
3) Market size estimates based on analysis of the revenue of leading automation platforms; 4) Enterprise Spend defined as spend on proprietary automation platforms, automation assets developed in-house, and related in-house and outsourced automation services, including bot configuration, management, deployment, support, and training

However, Enterprises are facing several Challenges to Scale Automation

TOP ENTERPRISE CHALLENGES WITHIN AUTOMATION

GLOBAL
CXO
SURVEY
257 CXOs

ORGANIZATIONAL CHALLENGES



34%

Lack of a defined
Automation charter
and accountability

24%

Shortage of
Automation-
proficient talent
in-house

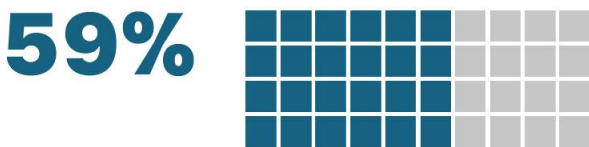
21%

Inability to secure
leadership buy-in

20%

Resistance to
change from the
existing workforce

PROCESS-RELATED CHALLENGES



63%

Highly fragmented
and non-standardized
processes across
geographies and
functions

20%

Lack of a robust
governance structure

17%

Inability to identify
Automation-ready
use cases

TECHNOLOGY-RELATED CHALLENGES



40%

Inability to
identify the best-fit
Automation
platforms

38%

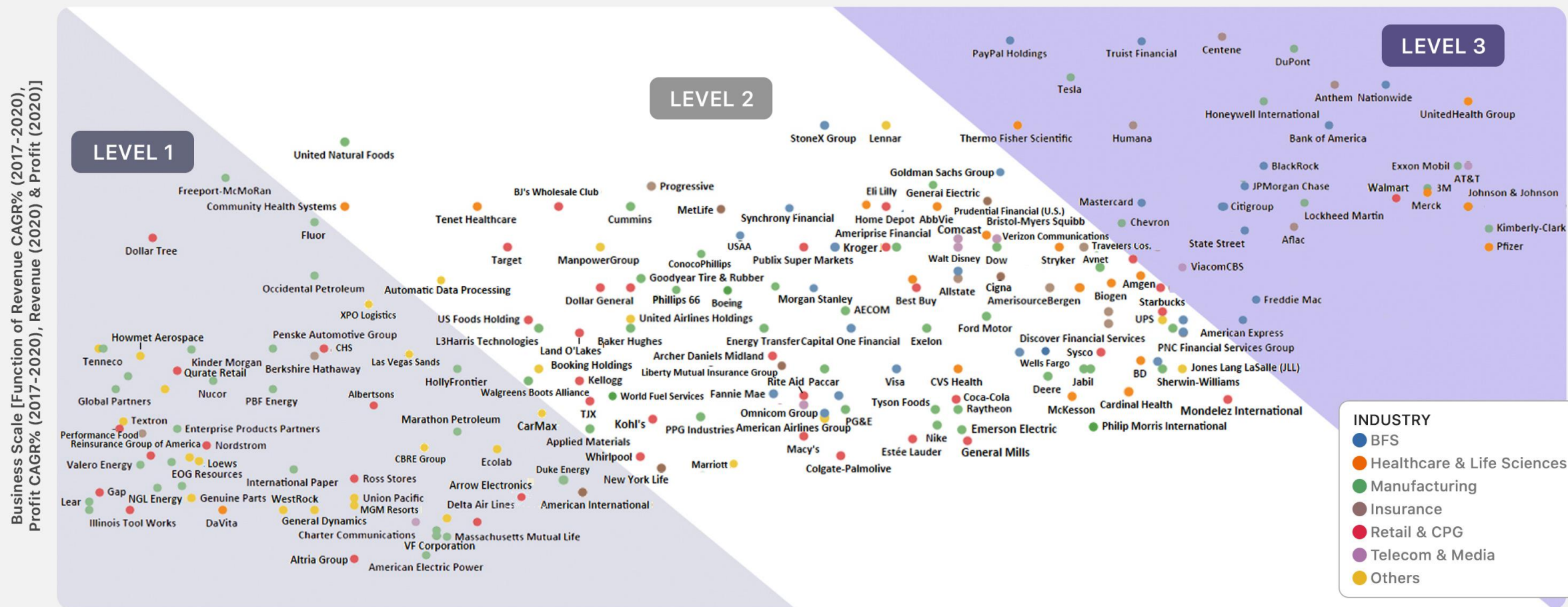
Inability to automate
high volumes of
unstructured data

22%

Long implementation
cycle and inadequate
support

Enterprises are at different Maturity Levels across their Automation journeys

FORTUNE 250 ENTERPRISE AUTOMATION MATURITY MODEL



01

TECHNOLOGY-LED ENABLEMENT

TECHNOLOGY ORCHESTRATION

EFFICIENT DATA MANAGEMENT

AUTONOMOUS PROCESS DISCOVERY

DEMOCRATIZATION OF AUTOMATION

DECISION AUTOMATION

02

ENTERPRISE-WIDE TRANSFORMATION

VISION & MANAGEMENT BUY-IN

COE OPERATING MODEL

GOVERNANCE MECHANISM

AUTOMATION SCOPE & OWNERSHIP

TALENT STRATEGY

CHANGE MANAGEMENT

03

ECOSYSTEM-LED EMPOWERMENT

BEST-FIT PLATFORMS

BEST-FIT SERVICE PROVIDERS

BEST-FIT ENGAGEMENT MODELS

Hyper Intelligent Automation (HIA): Orchestration of Technologies at Scale

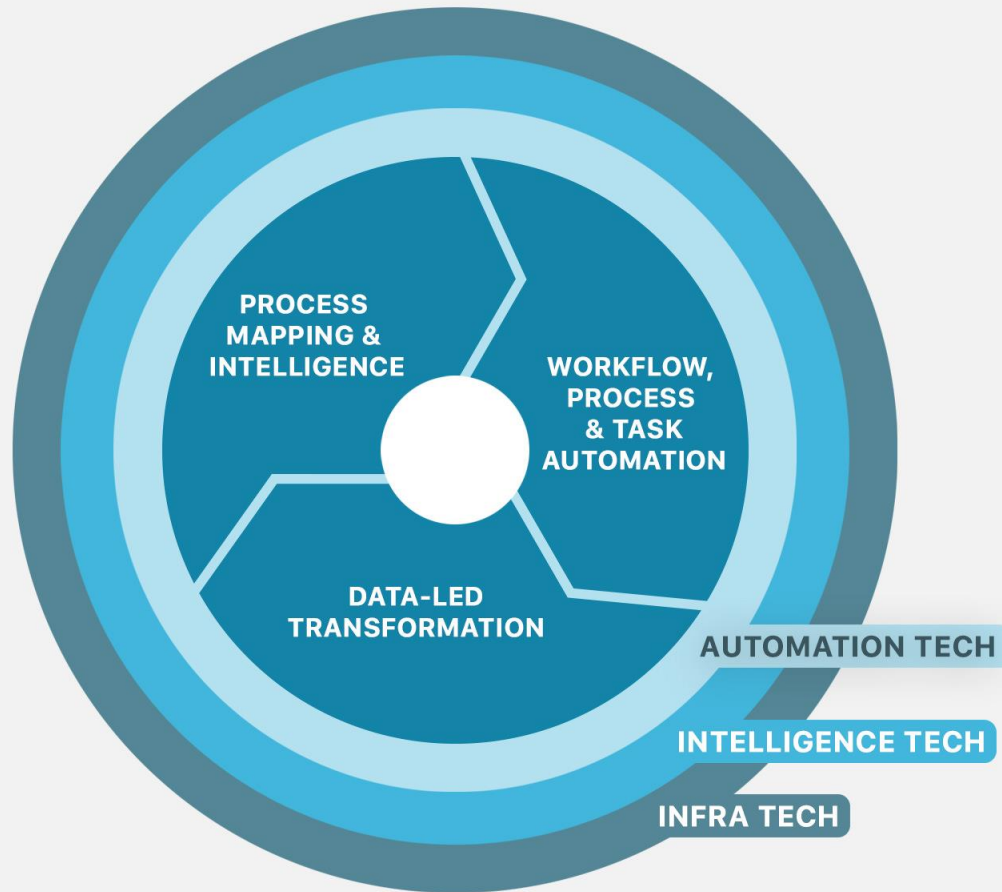
TECHNOLOGY
TECHNOLOGY ORCHESTRATION

ENTERPRISE

ECOSYSTEM



HYPER INTELLIGENT AUTOMATION (HIA)



OPTIMIZED VIA AUTOMATION

PROCESS MAPPING & INTELLIGENCE

PROCESS DISCOVERY

PROCESS MINING

TASK MINING

PROCESS MAPPING & UNDERSTANDING

PROCESS REIMAGINATION

iBPMS

DATA-LED TRANSFORMATION

INTELLIGENT DOCUMENT PROCESSING (IDP)

DOCUMENT MANAGEMENT & STORAGE

WORKFLOW, PROCESS & TASK AUTOMATION

LOW CODE/NO CODE-LED WORKFLOW AUTOMATION

RPA

INTELLIGENT VIRTUAL AGENTS (IVA)

API INTEGRATION

POWERED BY ADVANCED INTELLIGENCE

COMPUTER VISION

NATURAL LANGUAGE PROCESSING / GENERATION (NLP/NLG)

CONVERSATIONAL AI

MACHINE TRANSLATION

BUILT ON NEXT-GEN INFRASTRUCTURE

CLOUD

SECURITY

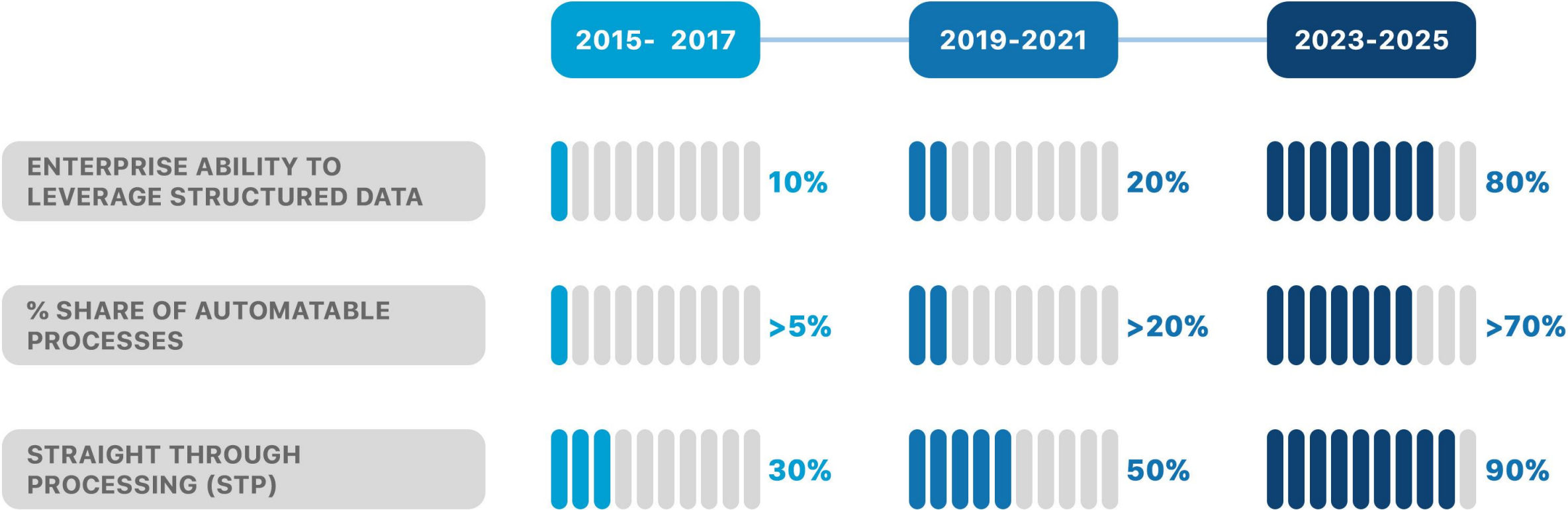
EDGE COMPUTING

DATA LAKEHOUSE

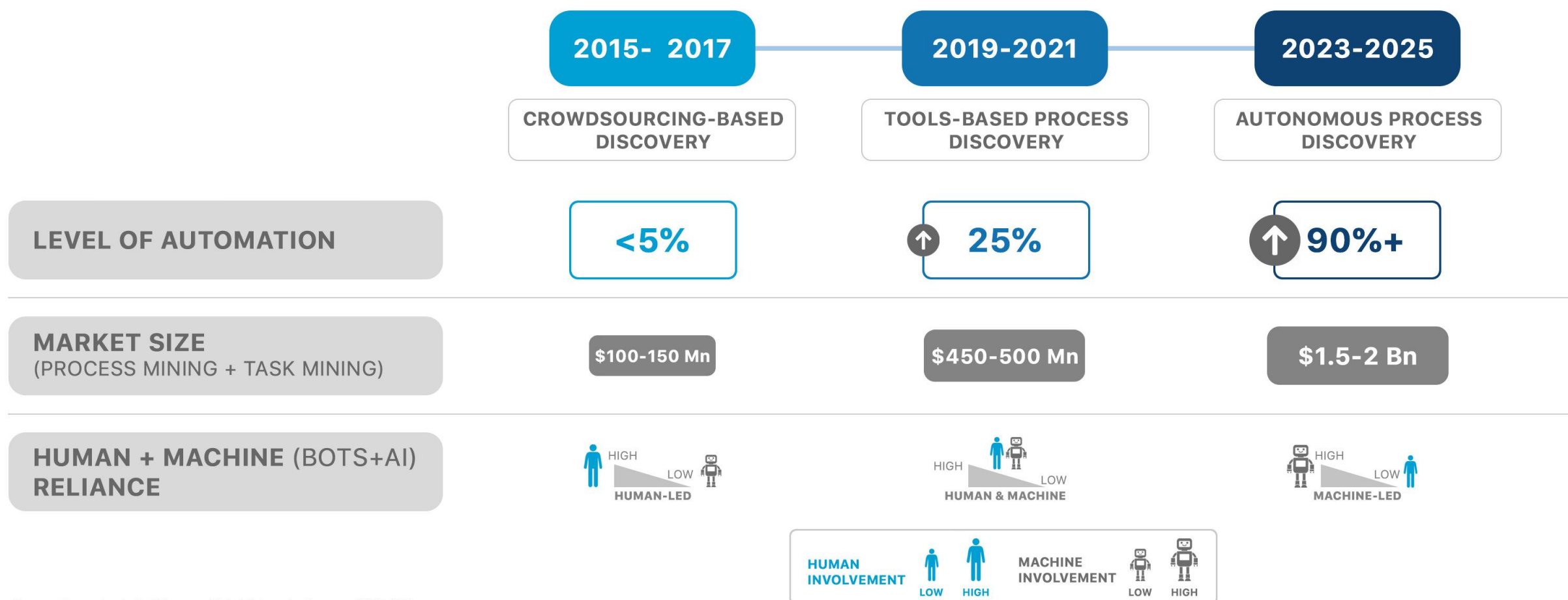
5G

Radical Transformation of Data Management Strategies to Scale Automation

Enhanced data management strategies can help unlock significant value from unstructured data, boost volume of structured data, and thereby scale automation



Identification and prioritization of automatable processes is shifting towards tools-based techniques, that will make the effort autonomous by 2025



Every Enterprise is becoming a “Software Development” enterprise

TECHNOLOGY

ENTERPRISE

ECOSYSTEM

DEMOCRATIZATION



Enterprises focused on building up developer capacity and striking a balance between Pro-Code, Low Code, and No Code developers will achieve scaled Automation

2015- 2017

PRO CODE
DEVELOPER-LED

2019-2021

RISE OF LOW CODE/
NO CODE DEVELOPERS

2023-2025

TRUE
DEMOCRATIZATION

SHARE OF DEVELOPERS
WITHIN GLOBAL ENTERPRISES



OF PROFESSIONAL
DEVELOPERS

OF LOW CODE/
NO CODE DEVELOPERS

OVERALL DEVELOPER
CAPACITY

21 Mn

8 Mn



LOW

31 Mn

25 Mn



MED

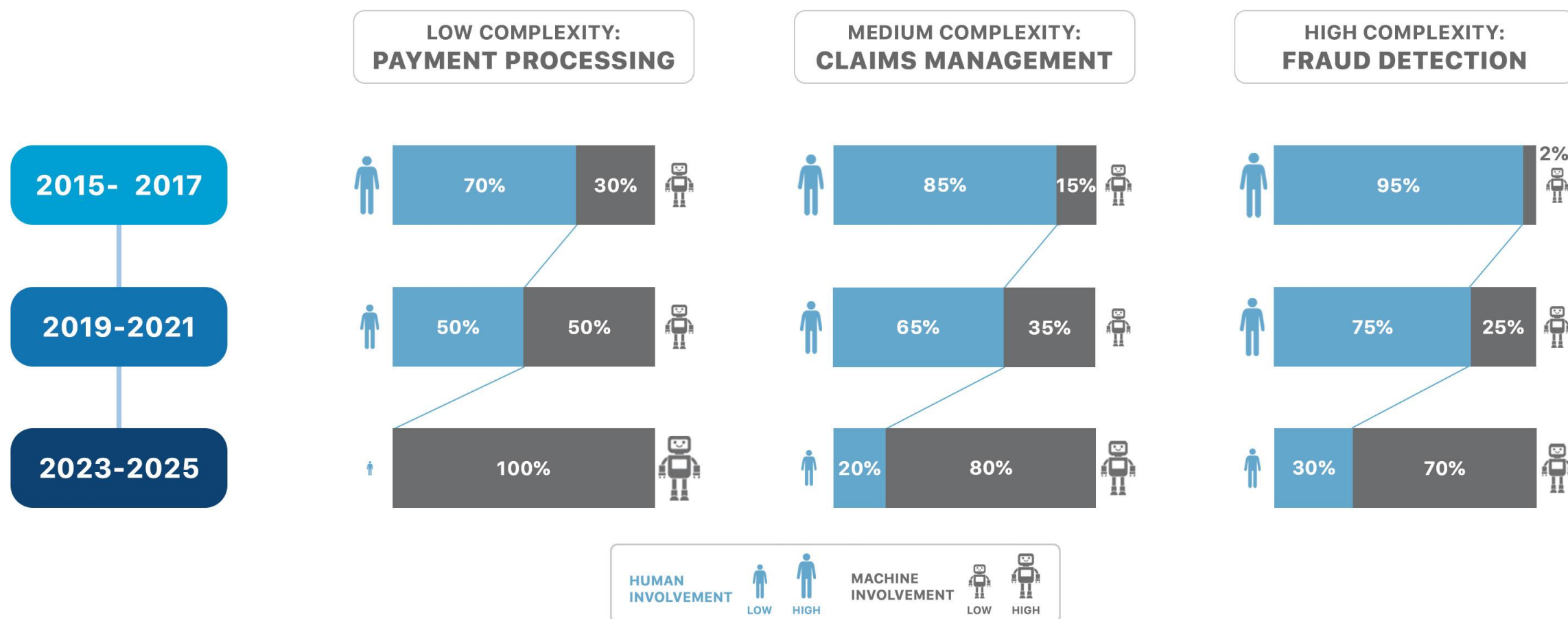
130 Mn

42 Mn



HIGH

AI is enabling Machines (Bots+AI) to think, learn, and interpret like humans, automate decisions across complexities, thereby augmenting the role of humans

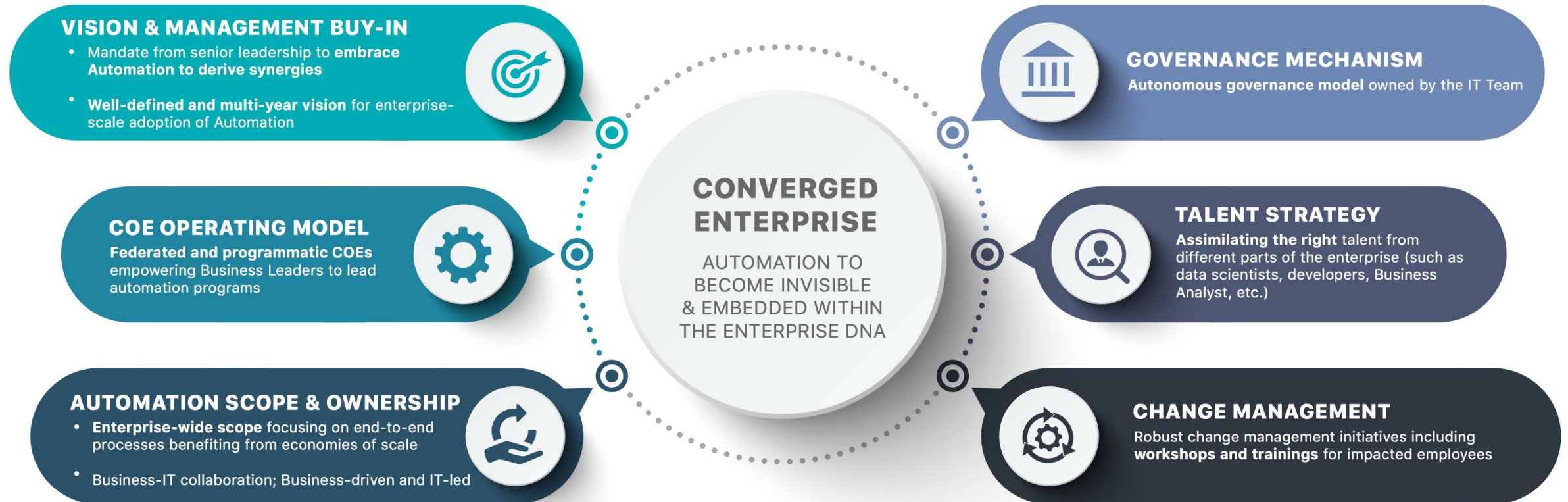


Need for Enterprise-wide Transformation to Scale Automation

TECHNOLOGY

ENTERPRISE

ECOSYSTEM



How to engage with the Best-fit Platforms?

KEY CONSIDERATIONS FOR PLATFORM DECISION ACROSS ENTERPRISE MATURITY LEVELS

LEVEL 1 MATURITY



Cost effective product to prove immediate ROI

Siloed leverage of individual technologies

LEVEL 2 MATURITY



Technology convergence via two or more platforms

Flexibility to customize as per business needs

Emerging focus on product R&D related investments

Integration of automation tools with enterprise systems

LEVEL 3 MATURITY



Platform of Platform with end-to-end HIA capabilities

Orchestration of multiple platforms and interoperability across systems/apps

Modularity and flexibility for high customization

Deep focus on R&D investments being planned for the future

Platforms with fully integrated pricing and billing

SCALE OF AUTOMATION

COMPLEXITY OF USE CASES

